NESLi2 under Scrutiny

Review of NESLi2 for Jisc Collections

Final Report

May 2014

Undertaken by Tony Kidd and Albert Prior

Contents

1. Executive Summary

Negotiations with journals publishers, under the NESLi2 banner, form a cornerstone of the activities of Jisc Collections. Although we have not had the opportunity to gather detailed figures, spending with publishers covered by NESLi2 will generally comprise well over half of a typical university library's journals budget, the journals budget itself taking up the lion's share of the library's expenditure on resource content.

This Review has concentrated on seeking views from the major stakeholders on how well the current iteration of NESLi2 is meeting needs, together with suggestions on how improvements could be made. Particular attention has been paid to the views of library staff – in the past, staff more directly involved in managing serials, and e-resources more broadly, have given feedback on the performance of NESLi2 in particular and Jisc Collections in general. While by no means neglecting the views of this group, we have also sought the opinions of library directors, many of whom have become much more closely interested in the workings and particularly the outcomes of Jisc Collections negotiations, as expenditure increases, budgets remain static, and the outworkings of the Finch report and related activities heighten the impact of Open Access, and journals expenditure more generally, among researchers and senior university management. Changes in the funding structure of Jisc Collections will also tend to give its activities a higher profile within HEIs, and therefore of more interest to library directors.

Other stakeholders have not been neglected, in particular publishers, without whom there would be no negotiations and no agreements, but also subscription agents, regional purchasing consortia, and international consortia. Jisc Collections staff themselves have also been interviewed. More detail on methodology is given in Section 3 below.

The first substantive point to note in this Executive Summary is that our interviews have confirmed that there is a remarkable level of trust in and respect for the role of Jisc Collections among the library community in the UK, along with a very high level of respect for the professionalism and commitment of its staff at all levels. This is a reflection no doubt of the high praise for Jisc Collections in the 2010 Review of JISC (alongside praise for JANET). It should also be noted that, when we asked what would happen in terms of negotiations if Jisc Collections ceased to exist, the most common answer by far was that it would be necessary to re-invent Jisc Collections.

Jisc Collections already seeks regular feedback on its services by means of an annual Satisfaction Survey for HE and FE, together with more informal feedback channels. The most recent HE survey from 2014 indicates that 66% are very satisfied (compared with 61% in 2013), and a further 32% fairly satisfied with Jisc Collections overall.

However, the review also confirmed that there are a number of concerns on, for example, the value for money being achieved by Jisc Collections in some of its negotiations, with a perception among some (predominantly but by no means exclusively library directors; the Satisfaction Surveys outlined in the previous paragraph will more usually be completed by e-resource managers), that price increases have been slowly rising in the last couple of years. There was some feeling of dissatisfaction with the annual savings information provided by Jisc Collections. There are also concerns over communications in general, but again not only from directors; the position of EIRWG; the way that negotiations are carried out (including delays in completion); and the input (or lack of it) from the community into criteria setting and the negotiation process. These concerns all reflect a certain sense of distance, a certain

lack of transparency and openness, felt by a not insubstantial part of the community. 'Trust' was a word that came up time and again in our interviews: in order to remain effective, Jisc Collections must retain and improve upon the present high level of trust with which it is regarded.

On a few more specific points, there does seem to be a strong consensus on moving away from the 'historic print spend' that still forms the basis of so many NESLi2 agreements. Although this has been said for several years, librarians, including directors, do seem more willing now to bite this particular bullet, and move to, probably, Jisc band based payments for a 'database', for the entire journal content of a publisher – even where this is disadvantageous for a particular institution. Transition arrangements may be possible in such cases. A number of our interviewees suggested that top-down support from RLUK and SCONUL (depending of course on their members' views) would facilitate such a move over a period of a few years. There is a clear view that new calculations should not be based on usage, for a number of reasons including the perverse incentives that such an arrangement would foster. It should be noted that there will be stumbling blocks along this route, including the sore point, for both libraries and publishers, of transfer titles, which, depending how they are handled, can make a noticeable difference to price cap negotiations.

The Call for the Review noted the distinction between 'opt-in' and 'closed consortium' models, and this was much pondered on in our interviews. On the one hand, the opt-in nature of most NESLi2 deals was probably the most commonly cited 'weakness' of Jisc Collections' negotiating hand; but on the other, few could see how a closed consortium for the whole of England in particular, however desirable, could be made to work, in terms of numbers and diversity of institutions. SHEDL and WHEEL were much admired, and SHEDL in particular is expanding quickly (though not without its problems), but there was a recognition that different factors are in play in Scotland and Wales. One interviewee noted that in Scotland the impetus for 'closed consortium' negotiations had come from below, whereas if there were to be any progress in England the initiative would have to come from above. There were some suggestions that RLUK members could negotiate as a group (via Jisc Collections), with resulting agreements open to all HEIs. The Finch Report did recommend that 'during the period of transition to open access publishing worldwide … funds should be found to extend and rationalise current licences to cover all the institutions in those sectors [i.e. HE and health]'. This is an example of leadership from above, but so far has not led to practical results, although there may be developments with the NHS.

The position of subscription agents in relation to Jisc Collections negotiations remains a difficult area. Library views are mixed, some strongly supporting the role of the agent, others unconvinced that agents have any relevancy at all in this particular area (negotiations with publishers on their overall content). In these circumstances, the Review supports the present position where Jisc Collections negotiates 'single payment' deals where they offer significant savings, while preserving the agent payment option in the very largest deals and seeking to keep open communication channels with the agents.

Although there was recognition by libraries of the important position of the regional purchasing consortia, quoting the current e-books deal for example, there was very little enthusiasm for these consortia playing a more important part in e-resource negotiations. Again, communication channels remain significant, perhaps by means of EIRWG membership for one of the purchasing consortia library chairs.

The Model Licence is regarded as a bedrock underpinning the NESLi2 agreements. The comparative lack of comment on the Licence in this Review is not an indication of any perceived diminution in its importance, but rather of its acceptance as part of the landscape. There are a number of recommendations concerning the Licence (including concerning confidentiality clauses, highlighted currently), but they are evolutionary rather than revolutionary. A symptom of the importance of KB+ (KB+ was mentioned many times during our interviews) was the desire for relevant licence information to be added automatically to an institution's KB+ application.

There was almost unanimous support for the involvement of Jisc Collections in negotiating APC payments along with subscriptions, as is happening this year, under the Total Cost of Ownership project, including consideration of total payments at an institutional level, although a number of lower-banded institutions felt that this would not affect them much at this stage, accompanied by a slight concern that the new emphasis on OA should not distract from the traditional concentration on achieving the best journal subscription price deal possible. Most libraries, certainly at research-intensive institutions, now administer APC payments on behalf of their institutions, and the trend is undoubtedly in this direction. Despite this, there was a more mixed view on whether Jisc Collections should be involved in actually developing a system to help with this. Some were very much in favour, while others preferred a 'home-grown' system, or perhaps one available from one of the subscription agents or another commercial provider. These libraries would value Jisc Collections' involvement in e.g. developing best practice, but they drew a distinction between much valued shared services such as JUSP and KB+, and an operational system to administer APCs.

Finally, there was an overwhelming feeling that 'NESLi2' as such had had its day, and that all agreements should henceforth be branded as Jisc Collections. There was recognition of the importance in financial terms of the big journal publisher negotiations, but also recognition of the increasing interconnectedness of content, which should be reflected in a single strong brand for e-resource negotiations by Jisc Collections.

The Review contains a number of recommendations, of varying strategic importance and relevance, including a number of relatively trivial – but important to some of our interviewees – comments (and some that may come into the 'motherhood and apple pie' category). Although we have used the form 'JC should…' it may be, given our time pressures, that a number of these recommendations already reflect existing practice (although even in that case they may not be widely known in the community, highlighting communication difficulties) or forthcoming developments. Also, of course some recommendations may be stronger than others, but all are for the consideration of Jisc Collections, and not all may be practical.

As a final comment, a number of recommendations involve extra costs, usually in terms of staff time. We have not attempted to carry out any costings, but recognise that there are always priorities and that opportunity costs and cost benefit analysis may preclude particular developments. On the other hand, a number of interviewees felt that, if the business case is there, Jisc Collections should not shy away from appropriate investment in staff. This may become a sensitive area, as the funding regime for Jisc Collections changes, but there is some potential support in the community for additional investment in this area.

2.   Introduction

In October 2013 Jisc Collections issued a Call for a Review of NESLi2, on the basis that the previous review of NESLI had been undertaken in 2003 (resulting in various changes symbolised by NESLI becoming NESLi2), and that there had been dramatic changes in the information landscape since that date, particularly relating to:

- budget pressures with ongoing reductions in the public finances;
- growing differences in the structure and funding of higher education across the four nations of the UK;
- the increasing importance of OA and APCs, in the light of the Finch Report and its influence on RCUK and the REF process.

The authors of this report were selected to carry out the review, which has been underway since December, reaching completion in April 2014. Interviews have been held with Jisc Collections staff, with library staff (directors and others), with publishers, and with other stakeholders including subscription agents, regional purchasing consortia, and international consortia. More details are provided in the Methodology section.

The most substantive part of the Review reports on the results of our interviews with library staff. This is divided into sections, corresponding to the headings of our interview questionnaire, which varied slightly for library directors and for other staff. Most sections, though not all, are completed by one or more recommendations arising out of the discussions held.

There is also a shorter chapter reporting on interviews with publishers, again divided into sections according to interview questionnaire headings, followed by recommendations where appropriate.

The final chapter of the main report brings together and lists the recommendations which have been given in their appropriate place in the previous two chapters. While essential to bring together the recommendations, it should also be remembered that the recommendations are best read in the context of the narrative in the sections where they are first noted.

There are a number of appendices, giving more detail on interviews with other stakeholders, listing some of the trends and developments that interviewees felt would be influential over the next few years, and giving details of all interviewees.

Finally, we should record here our gratitude to all those who were willing to be interviewed – at some length: most interviews lasted an hour, and some were considerably longer – and give their views on NESLi2 (and Jisc Collections). We were impressed by the enthusiasm of interviewees, both in supporting (generally) the role of Jisc Collections and in providing constructive criticism and suggestions for change, all of which should bode well for the future development of Jisc Collections.

3.   Methodology

The methodology used in the Review was predominantly by way of interviews, by telephone or in face to face meetings, with representatives of a wide range of key NESLi2 stakeholders and other bodies. These were:

- Jisc Collections staff
- E-resources librarians
- Library directors
- Publishers
- Subscription agents
- UK closed consortia, SHEDL and WHEEL
- Regional purchasing consortia
- International library consortia
- Further Education colleges

Numbers of interviews held were: 6 members of staff at Jisc Collections; a total of 60 librarians at 42 institutions, of which 26 were Directors, Assistant Directors or Heads of Libraries and the remaining 34 were e-Resources librarians; librarians at 2 Further Education Colleges; representatives of 20 publishers which included commercial, society and Open Access publishers; 2 subscriptions agents; librarians involved in two UK closed consortia; representatives of one Regional Purchasing Consortium and 6 international consortia, and representatives from RLUK, SCONUL, ALPSP and the British Library.

A list of all people interviewed and their institutions is given in Appendix 9.

In considering the libraries to be selected for interviews, the procedure adopted ensured that there was a suitable apportionment based on the location of libraries, ie England, Scotland, Wales and Northern Ireland, and also on Jisc Collections' banding. Separate questionnaires relevant to each of the groups of stakeholders were used in the interviews.

Two Librarians' Focus Group meetings were also held, in London and Manchester, attended by a total of 23 participants. Furthermore, a message was also sent to librarians by way of lis-nesli-reps list and jisc-collections-reps list towards the latter part of the project, seeking any additional views and comments for input to the Review. In this respect two additional comments were received as a result.

The interviews addressed specific aspects of NESLi2 under the following general topics:
- General views of Jisc Collections' service relating to NESLi2.
- The nature and relevance of the resources available in NESLi2.
- Negotiations with publishers relating to NESLi2 agreements.
- The two main subscription models used by Jisc Collections
- The NESli2 licence.
- Open access developments.
- Jisc Collections' communications with stakeholders.
- Future developments that might have an impact on NESLi2 and Jisc Collections itself.

The Review focused specifically on NESLi2, rather than on Jisc Collections, but the nature of a number of the questions in the interviews meant that aspects generally relating to Jisc Collections were also addressed.

4.   Library Interviews

4.1 Strengths of NESLi2

All stakeholders have commented positively on the current and continuing strengths of NESLi2. The leading strengths cited by library staff interviewed are, first, the power of national negotiations as a true 'shared service', both in terms of better terms achieved, and in terms of time-saving on administration and negotiation; second, the importance of the model licence and consequent standardisation of terms; and, third, the professionalism and experience of Jisc Collections staff, enabling the achievement of the potential benefits arising from national negotiations. The word 'trust' in relation to Jisc Collections (JC) was used many times by library interviewees: in general, JC has a very high reputation as a trusted organisation in its field of operations.

Other points mentioned included the influence of JC on broader national developments, such as APCs/Open Access, JUSP, and KB+, and benefits from international contacts; the international reputation of JC; the stimulus provided by NESLi2 towards e-only content allowing space-saving within libraries; the acceptability of JC to procurement staff in universities; and the fillip given to smaller libraries in particular in terms of being able to provide much more content for their students and staff.

4.2 Weaknesses of NESLi2

The main weakness cited by (library) stakeholders related to the opt-in nature of most NESLi2 agreements. This will be discussed in depth at the appropriate point below. There was also comment on the difficulty of catering for a very wide variety of institutions, in size, funding, research- intensity, and subject basis.

Then there were also some comments, both from Directors and from e-resource staff, querying JC's ability to achieve the best possible deals with publishers for the community, with a number wondering if JC staff were somehow 'too close' to those with whom they were negotiating, using expressions such as 'gone native' and 'could do better'. The perception is sometimes that JC seeks a middle position between the publisher and the library community, and can too easily see the 'publisher's point of view'. Such views in general did not seriously weaken the trust in JC mentioned under 'Strengths', and there was of course in most cases a recognition of the realities of negotiation. Nevertheless, JC needs to be aware that this perception, coupled with a perception that percentage increases have been growing over the last year or two, is relatively widely held (though by no means a universal view), and does not just reflect the grumblings of a very few vocal directors. Poor communications were also mentioned in a few cases, together with a lack of channels for input from library staff, and feelings that JC was not taking full account of the current pressures on HE.

A variant of the above (related also to opt-in considerations) was the feeling that JC negotiating power was just not very high, faced with monopolistic international publishers. Other comments were more specific, mentioning for example delays in reaching deals, and delays in the availability of licences; and problems relating to title transfers between publishers. Some felt that NESLi2 was rather 'old-fashioned', concentrating specifically on e-journals. There was also much criticism of the 'historic print spend' basis of most agreements, and pleas for more 'flexibility' (in relation to cancellations etc).

Recommendations

- 4.2.1 JC should take every opportunity to reinforce the message that it is not a 'neutral intermediary' of some kind, but is working hard on behalf of, and is responsible to, the HE/FE community.
- 4.2.2 JC should publish, on a secure part of its website, an annual review of price caps achieved in the previous year (not an easy calculation to make, given variables, options, etc), as we understand this is now available internally and to EIRWG.

4.3 Benefits from participation in NESLi2

All library staff interviewed recognised the benefits that had accrued to their institutions as a result of the achievements of JC/NESLi2. In addition to those implicit under 'Strengths' above, the level of additional content available to researchers and students was praised by many. One graphic comment noted that it was sometimes difficult to persuade academics that there was a crisis in this area, when access to journal content had increased ten-fold or more over the last decade and a half, with heavy usage of previously non-subscribed titles – 'Give me more crises like this!'. (This does not stop demands for immediate access to ever more content, of course, nor does it cut much ice with younger researchers [those under 50…], least of all with students who assume that everything without exception is available online right now).

The benefits of moving to e-only access were mentioned several times, along with much clearer provision of title-level information (via KB+ in particular), although this is by no means yet perfect.

There was some concern around the difficulty of actually proving benefit; see discussion below under Value for money.

4.4 Changes in perception of NESLi2 over last five years

In figures, around 19 felt there had been no change in their (already favourable) views. Perhaps 11 felt that their view had changed for the better, and a couple were less impressed than before (to do with JC in general not keeping up with the changing landscape, and conversely JC trying to do too much). Interestingly, the majority of those whose views had improved were directors or associate directors, sometimes in connection with a greater involvement or familiarity with the work of JC. A variety of other reasons were provided for improved perceptions: more content for smaller libraries and from smaller publishers, better value for money, single payment provision, better opt-out clauses, better communication, and more value-added services such as KB+ and JUSP.

4.5 Suggested improvements in NESLi2

There were quite a number of suggestions for change or improvement, but these are dealt with under more specific headings above or below. For information, the most commonly mentioned categories under this heading related to communication, moving away from opt-in, moving away from historic spend, more timely deals and licence provision, and problems relating to title lists.

4.6 Does NESLi2 cater for institutions' size, and subject mix?

In general, library staff were happy with the suitability of NESLi2 resources for their institution. A number quoted the number of deals in which they participated, suggesting

that they would not have signed up unless the mix of resources was suitable for them. A minority of smaller libraries thought that the deals were skewed more towards larger more research-intensive, more science-based, institutions, but even for smaller libraries there was a widespread recognition that JC negotiated deals for a wide variety of relevant resources (and some smaller libraries felt that there were now more agreements suitable for them). There were different views on the desirability of larger or smaller numbers of SMP agreements, but that will be further discussed below.

There was some apprehension about possible effects of moving to the new banding system – and some worries about band differentiation pricing at present: some libraries around Band 3/4 felt that there was not enough of a gap between pricing for them and Band 1/2 (whereas the highest banded libraries sometimes felt they were paying too much…). There were comments that JC should explore implications of the band changes on pricing for some libraries, although this may well have been done already, certainly in general terms; some reassurance may still be required. There was a suggestion that banding for subject-based resources should be based on relevant departmental size/income rather than the overall income band.

Recommendation

- 4.6.1 JC should consider arranging for further information on the new banding system to be released.

4.7 NESLi2 Helpdesk/Customer Service

There was universal approval of the service provided by Helpdesk staff. There were favourable comments on the friendliness, product knowledge, and prompt service provided by staff, using words such as 'brilliant, 'fab', and 'superb'. When it was necessary to seek advice and call back, almost all interviewees felt that return calls were made without delay (there was just one comment on a response delay on a particular occasion). Some of our interviewees said they felt hesitant on occasion to get in touch, as they felt their enquiry to be too trivial or something they should have already been aware of, but the unanimous view was that the response was always helpful and comprehensive, without any element of reluctance or being made to feel their query was unnecessary. The Helpdesk is obviously an essential and very much appreciated aspect of the service provided by JC.

4.8 Communications between Jisc Collections and libraries

This question, on the adequacy of JC communications with libraries and institutions, elicited a considerable level of comment, particularly but not only from library directors. Communications specifically during the negotiation process are discussed below. Taking library directors first, almost all directors felt that they could benefit from more information from, and contact with, JC. Some felt that this would best come via SCONUL or RLUK, and of course there already is some information provided through these routes. A short quarterly bulletin for directors was one quite popular suggestion, perhaps distributed through the SCONUL Directors list, but written by JC senior staff. This would include strategic-level information and updates. Directors would welcome more face to face contact with JC senior staff, at RLUK and SCONUL member meetings, recognising that it would be hard to arrange individual meetings. Contact becomes particularly important during difficult negotiations, and is dealt with below. Interaction of all varieties is important as JC and Jisc

emerge from a period of concentration on reorganisation, into a climate where there will be a greater emphasis on institutional subscriptions.

At other staff levels, there was also some concern about the level of communication, although equally some were happy with the present situation. Library staff other than directors would also welcome more face-to-face contact, with senior JC staff, with licence negotiators, and with more specialist JC staff (e.g. KB+, JUSP). It is recognised that roadshows do take place, but it seems there can never be enough of such opportunities – although presumably at some point attendances would drop off to the point where additional events would not be viable. There is demand both for specialist events (and it is recognised that there are regular sessions for e.g. partnership licences, e-Collections, KB+, JUSP, etc), and for more general feedback on what JC has been doing, and listening to library input back to JC. Webinars are very useful, but are not a complete substitute for actual meetings. Networking and information exchange are vital, according to our interviewees. The recently-announced JC Members' Meeting in June looks like an excellent example of the kind of interaction library staff are looking for. There is a geographical aspect to this, and library staff are grateful for JC efforts to spread meetings through the country, but again complete satisfaction is unlikely to be possible (it is interesting in this context that the Review's London Focus Group was much better attended than the Group held in Manchester, and that attendees in London included staff from Northumbria and Sunderland Universities, and from the British Geological Survey in Nottinghamshire). We recognise that such meetings are staff- and time-intensive, with high opportunity costs in terms of other activity, but nevertheless they would appear to be a high priority, both for their own sake, but also by way of putting across the JC message, giving JC staff a higher profile, and avoiding the impression that JC in some sense does not 'care' about its community. (While attendance at high-profile events such as the UKSG Conference is vital, person-to-person contact at such events is in fact quite difficult, and they are no substitute for smaller and more frequent gatherings). We repeat that there is a very high level of underlying support in the community for the work of JC, but we have also been made aware of some dissatisfaction, and it is important for the future of JC and its work that there are opportunities for exchange of ideas and information.

One particular kind of communication requested was more training for staff taking up e-resource management opportunities for the first time. No doubt JC have met this type of demand before, but it was mentioned a few times in our interviews. There is the 'Are you a new NESLi2 Rep?' paragraph in the Monthly Report, but actual training days would be welcomed.

Turning to another specific aspect, while there was general satisfaction with the content of lis-nesli-reps, the majority view was that this should be merged with jisc-collections-reps (this is part of a theme, whereby the distinctiveness of NESLi2 is no longer considered to be worth preserving). There was some confusion about the difference between the two lists, and particularly about whom within a library might be on one rather than the other – of course, that may be thought to be a library problem, rather than a JC problem. Many libraries would like more than two representatives to be able to sign up to lis-nesli-reps. There is a security and commercial confidentiality aspect to the contents of lis-nesli-reps which makes some control over membership important, but we feel that consideration should be given to opening up membership rather more than at present. The distinction between Primary and Secondary Contact was also unclear to some – if the distinction is still required (and there may be a need for a primary contact on occasion), there should be more explanation of the reasons and applicability.

Recommendations

- 4.8.1 JC should consider initiating a regular (quarterly or less frequent) bulletin for library directors, written at a strategic level by senior JC staff.
- 4.8.2 JC should attend, where possible and invited, more SCONUL and RLUK Directors meetings.
- 4.8.3 JC should consider, within constraints, holding more meetings around the UK, particularly 'general update' and information exchange meetings.
- 4.8.4 JC should investigate requirements for training for new e-resource management staff.
- 4.8.5 JC should consider merging lis-nesli-reps and jisc-collections-reps.
- 4.8.6 JC should investigate, within security constraints, lifting restrictions on numbers by institution signing up to lis-nesli-reps/jisc-collections-reps.

4.9 Communications within libraries

Both library directors and e-resource managers were asked about the level and frequency of communication between them, partly in the context of concerns about communication with library directors.

Perhaps unsurprisingly, there were few comments on inadequate communication. The volume of communication to directors from e-resource managers did vary, but the former felt that they were adequately briefed and were informed and consulted when exceptional conditions arose. A number of directors did not receive much information, trusting their staff to get on with the job, and trusting JC to negotiate the best deals. Directors generally trusted their staff, happy to leave day to day dealings with JC to them.

Equally, e-resource managers took much of the responsibility upon themselves, but were also reporting regularly to their director, either informally, or via monthly budget meetings for example, or when deals come up for renewal. Managers would also report negotiation crises to their director.

4.10 Jisc Collections website

The website was praised in general terms, and felt to have improved in recent years. (There were some concerns about finding resources via the Catalogue – perhaps keyword searching needs to be expanded further – but we have not been able to take this further and verify examples).

One comment that appeared on occasion was that there was some inconsistency between different parts of the website e.g. between MyAccount and the Catalogue, with resources not simultaneously available in both, and/or delays in information appearing following the announcement on lis-nesli-reps that a new deal was now available (e.g. JSTOR). In as much as this is the case, it no doubt reflects the difficulty of maintaining a website to perfection, and it may not be possible to eradicate such differences completely. No doubt everything possible is done to ensure automatic updating of the website, and eliminating the need for manual duplication where possible.

Recommendation

- 4.10.1 JC should audit website, taking into account the above queries.

4.11 MyAccount

MyAccount was also generally viewed favourably, with praise for example for the immediate email receipt of invoices on order. In some minds, there was less clarity on invoicing where this was not coming directly from JC, but this does not really appear to be a problem for JC specifically. On invoicing procedures in general, a number of libraries commented on being chased for payment slightly earlier than they would expect, but this is no doubt JC policy in terms of ensuring timely payment as far as is possible. The (forthcoming?) ability to pay via payment cards was also welcomed.

There was some confusion on different tabs within MyAccount, in particular queries on excluding Expired resources from display, although this would seem a straightforward matter of selecting the Active tab. It might be better if Active titles were the default tab, rather than All. (In addition, there was a suggestion that resources Expired within the last twelve months should be separately identified). No doubt on occasion MyAccount is covered in roadshows, and that would be an appropriate forum to discuss detailed matters of this nature with those present. In addition, it might be helpful to have a Comments option from within MyAccount to suggest improvements, but this is unlikely to be a top priority website enhancement.

One query that arose several times was whether it was possible for there to be automated emails to institutions alerting them to expiring deals. Although this is covered within MyAccount, some said that they did not sign into MyAccount regularly, and therefore personalised emails would help.

Recommendations

- 4.11.1 JC should audit MyAccount function, taking into account above queries.
- 4.11.2 JC should investigate the possibility of automated personalised emails re expiring agreements.

4.12 Selection of NESLi2 resources

There was no great dissatisfaction with the selection process for NESLi2 publishers – in most cases these select themselves, as the largest publishers of research journal content – but there would be interest in a more transparent selection, or nomination, process for smaller SMP publishers. There is a perception that the initiative for inclusion as an SMP deal often comes from the publisher itself i.e. the publisher approaches Jisc Collections, as opposed to Jisc Collections approaching publishers following some sort of selection process, although this may not be the case. Most interviewees recognised that there is an option to add resources to a Requirements List on the website (though some were unaware of this), and that there is a request for new suggestions at the end of every Monthly Report. Although these are valid routes, and should be maintained, it may be necessary to encourage responses in a more proactive way, for example by surveying NESLi2 reps once a year, asking specifically for new resources to be identified cf library surveys asking which publishers should next be approached to join JUSP . This is already done as part of the annual Satisfaction Survey, and that may be considered sufficient, in which case that route should be more widely publicised. Alternatively/additionally, a voting process could be organised on an annual basis for resources that have already been identified.

There was confusion among some librarians that Eduserv also offered e-resources. Despite a theoretical advantage of some competition, no one was particularly eager to maintain the separate existence of Jisc Collections and Eduserv. Where an opinion was offered, interviewees favoured Jisc Collections rather than Eduserv's modus operandi. Although a merger may be impractical (and of course Eduserv encompasses a wider range of services than just e-resource content), it would probably be welcomed by the community, or at least a consideration of a transfer of the e-resource aspects of Eduserv to Jisc Collections (with accompanying staff and other resource).

Recommendations

- 4.12.1 JC should consider a more proactive selection process, or publicising more widely the existing process.
- 4.12.2 JC should investigate the possibility of a closer relationship with Eduserv.

4.13 SMP agreements

There is much lower take-up of SMP deals than of those with the larger NESLi2 publishers. There were 140 subscriptions in 2013, with the engineering society publishers – IMechE, ASCE, ICE – the most popular, together with BioOne, Brill and Duke University Press. A small number of SMP publishers appear to have no takers at all, but it can take a year or two for subscriptions to begin. It also seems possible that not all subscriptions to SMP publishers are recorded by JC, with some orders going direct from the library to the publisher. There would appear to be low take-up of SMP deals by the lower-banded institutions; only 16, or about 11%, of the subscriptions are from Band 6 to 10 institutions, while the equivalent figure for NESLi2 subscriptions is about 20%. (JC will have more accurate and current figures). Reflecting these figures, a number of library staff were not aware of the existence of SMP, or of the differences between NESLi2 and SMP deals. Nevertheless, there was appreciation of their provision of more specialist content, and also appreciation by the SMP publishers we interviewed of the fact that JC were meeting a specific need. There was a comment that sometimes the JC SMP deal is not as good as that which has been negotiated by an individual institution with the publisher. Some felt that it was not necessary to identify SMP deals separately from NESLi2, or Jisc Collections other resources. But the SMP label does indicate a somewhat lower degree of engagement between JC and publishers, and it would probably be useful to retain some indication of this. The selection of SMP publishers has been discussed in the previous section.

As is mentioned below, some felt that JC should not dilute its resources by negotiating with these smaller publishers, while others felt that the more content available the better. In the absence of a consensus, given that SMP provision is providing a useful service to some, and provided that staff time spent on SMP negotiations is not excessive, then these agreements should probably remain as part of the JC portfolio. However, if this has not been done already, it may be worth attempting a fairly low level cost benefit analysis of the provision of these resources, to check that this should continue.

Recommendations

- 4.13.1 JC should continue to label SMP deals in some way, to indicate a 'light touch' negotiation.

- 4.13.2 JC should consider undertaking a cost benefit analysis, comparing the value of SMP deals to the community, with the cost to JC of undertaking negotiations and supporting the deals.

4.14 Merging negotiations for e-journals and e-books (and other formats)

Most libraries were not in favour of a wholesale extension to include e-books and e-journals in the same negotiations. Most libraries are still purchasing e-books on a title-by-title basis, sometimes at least partly through PDA mechanisms, through aggregators, often as part of the SUPC e-book agreement available nationally. There was also the question of budgeting arrangements: for most libraries books, including e-books, are funded separately from journals (and perhaps dealt with by different departments/staff within the library) – though change is certainly taking place, and no doubt could accelerate should circumstances encourage this. And finally there were concerns about JC 'mission creep'.

However, many libraries had dipped a toe into purchasing packages of e-books, and a few (larger research-intensive institutions) were aggressively pushing purchases of e-books on a bulk basis. One driver for this publisher-based rather than aggregator-based route is the DRM disadvantages of aggregator content – users are accustomed to 'hassle-free' access to journal articles and are impatient of restrictions of one kind or another that tend to accompany e-book aggregator access. There are also benefits, especially for researchers, in having access to journal articles and books on the same platform. There is a trend as well for publishers to withdraw content from aggregators, pushing users towards access via publisher platforms.

E-textbooks were mentioned as a continuing problem by many, who were keen that JC continues to probe different models of e-textbook provision.

So, given that content is increasingly seen by users as undifferentiated, a trend encouraged by library discovery systems, and that there is some interest from libraries (the application of the model licence to books was also mentioned), JC should not be reluctant to include e-book content in negotiations where there are particular, pricing or other, advantages, and perhaps opportunities to negotiate in innovative ways. There should always be options available allowing libraries to subscribe to only e.g. the e-journal content; and it should be axiomatic that including e-books does not dilute the value proposition for the journals part of the deal, which remains the top priority for most libraries.

Recommendations

- 4.14.1 JC should continue to explore the combination of e-journal and e-book negotiations with publishers, seeking value-added options, provided that choices remain to subscribe to either e-journal or e-book content.
- 4.14.2 JC should continue to model and experiment with solutions to the e-textbook access problem.

4.15 Particular resource categories that NESLi2 should include

A large number of libraries had no strong views on the inclusion of additional resources, but it is perhaps not a surprise that legal databases (LexisNexis, Westlaw, etc) came out top of desiderata, followed by further business content (including single titles like the Economist and Harvard Business Review, as well as e.g. Mintel), and then art and design resources

(though not many actual examples were put forward under this heading; exhibition catalogues were mentioned as a desiderata). One or two other publishers were mentioned, including LWW, Royal College of Nursing, and Adam Matthew (as an example of primary source material), and video/DVD content, and apps, also came up on occasion. There was a general recognition that JC had made attempts to negotiate on some or all of these categories, but further efforts would be appreciated by the community. IEEE and AAAS were brought up quite often, though again with recognition of the difficulties faced in each case: in general, libraries do not feel that a deal is essential at any cost in every case, and there is an appreciation of the importance of the licence for instance. AAAS/Science will be discussed further below.

There was also a philosophical argument on the extent to which JC should extend its negotiating reach. On the one hand, a number felt that for maximum benefit JC should concentrate on perhaps only a few of the largest journal publishers, to obtain the best deals possible where the most money is spent. This group is a minority, but not an insignificant one. The majority felt that JC was about right in its current scope, but again a not insignificant minority felt that JC should aggressively be negotiating deals with as many content providers as possible, given the insatiable demand for content, anything, by researchers and students. There are of course resource implications for these different options, which may come into stronger focus, as JC becomes more directly dependent on subscriptions from individual institutions.

Recommendations

- 4.15.1 JC should consider approaching again in particular legal content suppliers (and selected business suppliers, and others mentioned above) for negotiation, following a consultation process with the community (see also 4.12 above)
- 4.15.2 JC should, in the event of failure to reach agreement, ensure that the community is aware of this, including reasons for failure to agree.

4.16 Jisc eCollections

While Jisc eCollections is not strictly part of NESLi2, the opportunity was taken to ask libraries their views on this resource. As is well-known, there was considerable dissatisfaction with the functionality on its introduction of eCollections, particularly relating to the Historic Books content (EEBO/ECCO). There is recognition that substantial improvements have been made, but there is still reluctance particularly among larger institutions with significant humanities research interests to move away from the original EEBO and ECCO platforms. And in most cases, libraries and library users prefer to search the publisher Journal Archive versions. MediaHub is of interest, although libraries would prefer the option of subscribing only to that resource, rather than having to take a combination of at least two of the three components of eCollections.

Nevertheless, there is some appreciation of the motives behind setting up the Jisc eCollections service, particularly as platform fees begin to rise for some resources where these were originally zero or very low. Libraries understand the importance of maintaining access independent of the e-resource supplier, with additional options should access via the original supplier become too expensive, or even non-existent. But at present, there are still quite a large number of libraries unwilling to spend scarce funds on supporting this theoretical concept, unless and until the eCollections functionality improves still further.

Recommendation

- 4.16.1 JC should continue to improve e-Collections functionality (as recently announced), and continue to market the resource, including the underlying motives behind its establishment.
- 4.16.2 JC should consider whether an option to subscribe to a single component could be introduced, or explain further the reasons why this would be impractical.

4.17 Jisc Collections' procedures for negotiations

Quite a number of library staff at all levels felt unable to express an opinion on JC negotiation skills and procedures, as they felt they had little information on which to base a view. There was also a substantial number that expressed satisfaction with JC, given the outcomes achieved in terms of pricing, coverage, licensing terms, etc. However, as suggested under 'Weaknesses' above, there was also some dissatisfaction, more so among directors, though not restricted to them.

Among comments, in addition to those noted above, there was a feeling that institutions were steered towards agreements that publishers would accept (rather than vice versa); that more planning and timetabling was needed (although of course this does take place) in order to reach timely deals; and that JC staff may well be overworked. In connection with this, although not raised by libraries, there may be advantages in a more formal training programme for JC staff, in particular negotiators. This is not to say that negotiations are not carried out at present professionally, calmly and in a determined and assertive manner, but every organisation relies on continuing professional development, and relevant training would indicate JC's commitment to continuing improvement in the negotiation skills of its staff. (There was one suggestion that JC negotiators should receive performance-related pay based on quality of deals negotiated: apart from measurement difficulties, this would perhaps not have the desired effect on staff morale – although it is not beyond the bounds of possibility that some such pay mechanism operates within some publishing companies). There was some support for more community involvement in negotiations, see discussion below under 'Position of RLUK in negotiations' (although this should not be restricted to RLUK Directors). There was also support for the involvement, exceptionally, of directors of finance and other senior university staff such as Research PVCs, in particularly difficult or high-profile negotiations; this would require careful planning.

It has always been difficult to have as much information as is desirable before commencing negotiations, to allow evidence-based arguments as much as possible. Interviewees welcomed surveys of existing users (to be available to all institutions and not just subscribers) before the start of negotiations, including recent Wiley and Taylor & Francis surveys. The results, or a summary, of these surveys should be available to respondents, to encourage buy-in and participation by the community.

In addition, several interviewees mentioned the previous practice whereby libraries were surveyed on their likelihood of renewing, or newly subscribing to, the publisher offers that were for negotiation in the coming year. Libraries were also asked to estimate how much they spent on these publishers' content. This was felt to be a useful way of engaging with upcoming negotiations, and giving libraries the feeling that they were part of the process. Perhaps the information received was too vague or incomplete, but it may be useful to consider reinstating this (it is no doubt at least partly covered by the more specific publisher surveys).

Efforts to document the actual financial/budgetary health of libraries prior to negotiation have been made on a number of occasions (publishers have a tendency to assert when told of overall budget difficulties that this is not necessarily what they are hearing when visiting individual institutions), but this is very difficult to achieve in practice. During, certainly at the start of, negotiations, most libraries will have no idea of their likely budget in the forthcoming financial year. SCONUL statistics provide some information, but by their nature are always at least two years out of date. Institutions could be asked how the present year's resources budget compared with the previous year's, or previous two-three years, as there are always fluctuations. Complications and caveats are endemic, plus perhaps sometimes a tendency to play down any budget increases received. Nevertheless it might be worth trying this (around November/December) to see whether any useful information could be gathered: most likely any survey of this nature will reveal wide variations between institutions (and wide variations for a single institution over a time period). Institutional finances, not just libraries, are also relevant, but perhaps even harder to pin down.

Recommendations

- 4.17.1 JC should investigate a training programme on negotiation skills for its staff.
- 4.17.2 JC should consider more community involvement in negotiations, including library directors and others, and on occasion directors of finance or other senior university staff.
- 4.17.3 JC should continue to survey users (and non-users) before negotiation with individual publishers, and disseminate the results.
- 4.17.4 JC should also consider surveying libraries more generally on forthcoming negotiations.
- 4.17.5 JC should consider, as an experiment, asking libraries for budget information for previous two-three years this November/December.

4.18 Communications during the negotiation process

There was almost unanimous approval of the Monthly Reports sent out by JC, including their timeliness and comprehensiveness. Some asked if more information could be given concerning individual negotiations under way, while at the same time most recognised that a blow-by-blow account of negotiation meetings and emails would not be productive. There was one suggestion that the Monthly Report should be produced (at least as an additional option) in the same way as UKSG e-News (which comes via JC) i.e. there would be the opportunity to choose to read particular sections rather than the whole Word document.

The communication process is intimately bound up with the all-important concept of trust. While nobody, as far as we know, thinks that JC is not working hard on behalf of the HE and FE community, there are doubts that JC is getting the best deal possible. For example, a number suppose that JC start the negotiation ball rolling by suggesting a 3% increase, which is a very different matter from finishing up with a 3% increase following tough negotiating sessions. In order to keep the community onside, it is better to provide more information rather than less, even where there may be no objective advantage in the additional information provided. One quote from an RLUK library e-resources staff member: 'librarians don't feel part of Jisc Collections/NESLi2, so they criticise rather than support the negotiators'. Information exchange is particularly and vitally important at library director level.

Where communications do become all-important is if and when negotiations are in danger of stalling or collapsing. Communication with library directors is vital at this stage, with opportunities for feedback perhaps via SCONUL/RLUK. As much notice as possible should be provided to institutions in these cases, both for practical reasons in terms of subscription agent renewals and possibly budgeting, and more importantly to encourage buy-in and support, especially if an eventual failure to reach agreement comes to pass, and to allow feedback to JC. Time is also important to allow institutions to consult their academic staff and researchers, and senior research and financial officers, concerning the implications of saying no (or yes), and to develop any possible alternative courses of action.

Recommendations

- 4.18.1 JC should investigate an alternative web-based format for the Monthly Report, in addition to current version
- 4.18.2 JC should increase frequency and content level of communications where negotiations in difficult, including opportunities for feedback.

4.19 Negotiation criteria

In recent years, negotiation criteria have not in general been shared with library staff at the start of the negotiating season, although they are discussed and approved by EIRWG, and they do become visible to libraries at the end of the process in the Offer Documents, where a section towards the end notes whether or not each negotiating criterion has been achieved. The 2011 Negotiation Criteria are available within MyAccount, but nothing later. Although not universal (a good number were quite happy to trust the judgement of JC and EIRWG), there was significant support for a more open attitude to negotiation criteria. At the 'conservative' end of the spectrum this would include publishing criteria on a secure part of the website, but not offering any opportunities for comment or feedback. A greater number, particularly directors, would welcome the opportunity not only to see, but also to influence, criteria before the start of negotiations, 'setting the ground rules'.

There is a recognition that, if feedback is to be meaningful, this would slow down the process, or at least put back the timetable – publication of criteria, following consideration by EIRWG, and feedback would ideally take place at the end of the previous year, to be reviewed and endorsed by EIRWG in January or thereabouts. There is also a recognition that security and confidentiality are vital: a wider consultation process would increase the risk of leaks, even if inadvertent. It also has to be borne in mind that criteria are one thing: the final result is almost always different, and the community would have to accept that it is not always possible to achieve every criterion – priority setting (and compromise) is part of the negotiation process.

However, repeating the importance of the development and maintenance of trust and active participation, it would seem worthwhile to set up ways of enabling greater community participation, and particularly the participation of library directors, in the process of setting negotiation criteria.

Recommendations

- 4.19.1 JC should consider securely making available Negotiation Criteria and asking for feedback, including from library directors, perhaps via RLUK and SCONUL.

4.20 The position of EIRWG

EIRWG was not initially a priority in our discussions with library staff, but it became clear that there was a good deal of concern with the position of EIRWG in relation to JC and NESLi2. This was not a reflection on the individual members of EIRWG, or their commitment or expertise, but more on the governance and transparency of EIRWG. Almost every librarian we spoke to knew of the existence of EIRWG, but few were able to say very much about its role.

Taking transparency first, EIRWG is not particularly easy to find on the JC website. It should have a first screen point of access to enable those interested to more easily check out its aims, its membership and its minutes. In terms of Summary Minutes, the most recent cover the meeting on 17/18 May 2011. If Summary Minutes are to be included at all, they should be kept much more up to date. Also, while for various reasons including but not limited to commercial confidentiality, it would be inappropriate to include the full minutes. The Summary Minutes should be much more informative than they are at present. The two examples on the website are each one page, of which two-thirds is the list of members present (plus apologies). The Work Plan is also on the website, but only up to September 2013.

On governance, there was little understanding of the terms of reference of EIRWG, although these are provided on the JC website. Every 12 or 24 months these should be notified to library staff, including directors, at least by means of a link. It may also be appropriate that they should be reviewed, if that has not happened recently.

The composition of EIRWG came up for much discussion. There was general support for it to continue to be composed of both library directors and experienced and expert e-resource staff (although there was one suggestion for a separate strategic library director's group, to be advised by an expert e-resource group), as it was felt that that this provided the optimum mix of strategic and expert guidance. There were a number of suggestions, from library directors, that there should be a higher proportion of director membership (although it is unlikely that any had checked out the actual current balance). Current membership includes four directors, three deputy (or equivalent) directors, and three senior e-resource staff (plus representation from the Research Councils, the British Library, and Jisc; and the Executive Directors of RLUK and SCONUL). In balance terms, it might be appropriate at most to replace one of the deputy directors by a director, but it would seem inadvisable to reduce the representation of e-resource staff.

There was also a general feeling of lack of transparency in how membership of EIRWG was achieved. It may not be possible to open up membership completely – it is vital that EIRWG members both have serious expertise, and have a commitment to making a real contribution in this area – but more openness in the selection of members would be welcomed by the community. It is important that membership is representative of the community, while taking into account available expertise and, at least to some extent, expenditure patterns. At present, of the ten HE library members, six are from RLUK libraries (2 directors, 3 deputies, 1 e-resource). In new Jisc Band terms, there is one Band 1 library, one Band 2, three Band 3, one Band 4, and four Band 5 libraries. This may be a realistic distribution, although it might be useful to have one representative from the lower bands (Bands 6 to 10 include almost half of UK HEIs in numerical terms). It may also be useful to have an FE representative, although this can be difficult to arrange (but was in operation in the past). In 'national' terms, there are currently nine representatives from English HEIs and one from Scotland.

The SHEDL Steering Group (following the SCURL Business Committee) operates a 'constituency' model for its composition; this works well in that context.

Finally, terms of office were also of interest. To achieve a better representation of the community, and again more transparency and openness, it might be appropriate to limit terms to say, three years, plus a single extension of a further three years (with exemptions for the Chair), following which there should be a compulsory 'gap' of at least three years before re-election/appointment. It would be important to stagger terms, to avoid the possibility of an alarming lack of experience and expertise.

A different membership suggestion was that BUFDG should be invited to nominate an observer to attend EIRWG meetings. This would have the potential of improving communications between JC/EIRWG and HEI directors of finance, which has been a desirable outcome for some time, in the context of negotiations, perhaps even more so in the new post-Finch environment. Similarly, an observer from ARMA might also be useful in this context. Whether such observers would have the same incentives to attend EIRWG meetings is perhaps a moot point, and the size of a meeting is also a consideration, but even if minutes were regularly exchanged that might improve co-operation and collaboration.

The above covers EIRWG governance, but its actual role also came under scrutiny. Many would be interested in receiving more information from EIRWG – perhaps instead of or in addition to Summary Minutes, the Chair (or another member) could provide an informal summary of proceedings following each meeting. More communication from EIRWG at crucial points during negotiations would also be welcome (recognising that does happen now to some extent).

All the above suggestions are another way of breaking down perceived barriers between 'us' and 'them' (i.e. libraries and JC), which did appear to be a recurring feature of our conversations with library staff.

Recommendations

- 4.20.1 JC should improve EIRWG's visibility on the JC website, and ensure that documentation is up to date.
- 4.20.2 JC should consider whether EIRWG's terms of reference need review, and they should be publicised to members.
- 4.20.3 JC should consider the balance of membership of EIRWG.
- 4.20.4 JC should consider how EIRWG members are appointed, to improve transparency.
- 4.20.5 JC should consider terms of office for EIRWG membership.
- 4.20.6 JC should consider BUFDG and ARMA membership, or attendance, at EIRWG.
- 4.20.7 JC should consider the role of EIRWG in communication with members.

4.21 Position of RLUK in negotiations

RLUK libraries, including 28 UK HEIs, account for around 36% of all NESLi2 deals as recorded by JC, and around 59% of SMP deals. These are in terms of numbers; in terms of value the RLUK proportions will be higher. Although we have not done any calculations, if an assumption was that the average RLUK expenditure on a deal was twice as much as an average non-RLUK library expenditure (perhaps a conservative assumption), then RLUK would account for about 53% of NESLi2 deals by value. David Prosser, RLUK Executive

Director, has served as an EIRWG member for a number of years. RLUK have, in the past and currently, expressed an interest in influencing the negotiations in terms of the price cap to be applied, and at the end of February issued a document on journal price increases http://www.rluk.ac.uk/wp-content/uploads/2014/02/RLUK-position-paper-on-journal-price-increases-final.pdf, putting forward a maximum price increase of CPI less 1%, and stating that RLUK members 'will not accept increased prices based on additional journal titles unless there is an option to take a like-for-like package'.

The general feeling among the RLUK Directors with whom we spoke was that they felt more comfortable with Jisc Collections in terms of negotiations than was perhaps the case a few years ago. The negotiations with Elsevier in 2011 were often recalled, and there was a recognition that on occasion relationships between Jisc Collections and RLUK were strained, although there was also a feeling that in general the negotiations had been reasonably successful, and that for example the work done on ASPI/Plan B had not been a waste of time (though no one admitted to relishing the prospect of actually putting ASPI into practice). A number of directors, and others, felt that price rises had been creeping up again since the Elsevier and Wiley deals struck at the end of 2011, worrying that the hard work involved in those deals had somehow been dissipated, to some extent at least, over the succeeding couple of years. We should note that we did detect an undercurrent of unease among some non-RLUK libraries that they were in danger somehow of being dragged along on the coattails of an RLUK agenda, but of course everyone approves of low price rises. The unease relates perhaps to a feeling of lack of influence on decision-making; Ann Rossiter's membership of EIRWG may help to overcome this perception, together with whatever steps can be taken to render EIRWG more transparent, and more open to the community. Senior RLUK Board members that we interviewed certainly felt that they enjoyed a good relationship with JC, although there was a concern that this might not apply to those outside an 'inner circle'. There were suggestions that senior JC staff should attend, and perhaps speak at, more RLUK Members' Meetings – Hugh Look's presence at the Members' Meeting in St Andrews in 2013 was welcomed. Again, this is another way of improving JC visibility to directors, and is applicable to SCONUL as well as RLUK.

In terms of actual involvement in negotiations, there is some interest among RLUK Directors (this may also be true of some non-RLUK Directors, but did not manifest itself among the sample interviewed by us) in taking some direct part in negotiations, perhaps at an initial scene-setting stage, and if/when negotiations become particularly difficult, though not at intermediary points. It may be best, instead or in addition, if EIRWG members take a more direct role in negotiations at the start/finish points. It is also true that RLUK are interested in influencing the course of negotiations, even if not directly participating.

Recommendations

- 4.21.1 JC should maintain and proactively develop links between JC senior staff and the RLUK Executive Director and Board.
- 4.21.2 JC should consider more community involvement in negotiations, including library directors, organised via RLUK (and SCONUL) and/or via EIRWG (see 4.17 above)

4.22 Position of SCONUL in negotiations

Library staff generally welcomed the fact that Ann Rossiter, SCONUL Executive Director, was now a member of EIRWG. Several directors mentioned that the SCONUL Monthly Newsletter

gave a regular update on JC negotiations, and SCONUL has just started publishing *Jisc Watch*, giving clear information about developments within Jisc, including JC.

There was some feeling that Ann Rossiter could report back to SCONUL members (directors) on EIRWG and JC, and co-ordinate responses from SCONUL members to JC. On the other hand, there was also a feeling that it was unnecessary for SCONUL to act as intermediary in this way. This is a matter for discussion within SCONUL, but it was suggested that in any case there should be regular contacts (these may well already exist) between Ann Rossiter and Lorraine Estelle, to exchange information and liaise on relevant matters. In our interview, Ann Rossiter stressed her eagerness to facilitate contacts, should this be helpful. For example, if negotiations are likely to prove difficult, then SCONUL is an obvious route to inform library directors, and gain feedback from them. Communication is a two-way process, and it is likely to be helpful in terms of building relationships that Lorraine Estelle is speaking at the SCONUL Summer Conference in Glasgow in June.

Recommendations

- 4.22.1 JC should maintain and proactively develop links between JC senior staff and the SCONUL Executive Director and Board.
- 4.22.2 JC should consider more community involvement in negotiations, including library directors, organised via SCONUL (and RLUK) and/or via EIRWG (see 4.17 above)

4.23 Negotiation tensions

Interviewees were asked if, other things being equal, they would prefer a deal to be negotiated 'in good time' or they would prefer to get 'the best deal'. Other things are rarely equal, but, although there was definite concern among e-resource managers to conclude deals for timely renewal of titles where appropriate with subscription agents, the consensus, among e-resource staff as well as directors, was to hold out for the 'best deal'. This consensus wavered a little if access cut-off were to become an issue, but in general the best deal view still held. A corollary was that there should be comprehensive and regular information provided by JC where delays were likely to occur. Although the not unusual absence of a licence document for a period after the offer publication was a nuisance for everyone, and a real barrier for a few, most felt that this should not prevent conclusion of a deal, while asking JC to seek ways of avoiding this problem in the future. There was also much advice on starting negotiations earlier, but perhaps the real breakthrough would be for (some) publishers to keep to deadlines that have been agreed as part of the negotiation process.

Interviewees were also about their preference for 'simple' deals, as opposed to those with options for different situations. Of course in the abstract simple is best, but there was widespread recognition that options were often inevitable, and indeed for many a good opportunity to pick and choose. Smaller institutions often suggested that there were not enough subject-based options for them, given that they did not have the same comprehensive coverage as large institutions. In practice, subject options are often not taken up in large numbers, because their cost is still too high for smaller libraries (and also because publisher pricing models generally push libraries towards taking the all-in option). Nevertheless, there is still a demand for such options.

There was also a definite ambivalence towards including new, and particularly transfer, titles in publisher offerings. While a number still want to go for the complete collection, for

simplicity, comprehensiveness, and not least ease (supposedly) in terms of title lists/discovery systems etc, there are equally a number that do not want to pay extra for extra content (cf recent negotiations with Oxford University Press). Logically, this can lead to separate 2010/2011/2012/2013/etc collections, and is not ideal for anyone in the medium term. A further complication is that larger libraries at least are likely to subscribe already to one or more of the transfer titles – whose subscription price will almost certainly rise substantially following acquisition by the new publisher – and it may be 'preferable', in the new circumstances, to go for the comprehensive collection. The preferred solution from the HE point of view is that new/transfer titles should be included at no extra charge, at least for the duration of a particular deal (SHEDL has been attempting to include such clauses in its agreements) – the drawback there is that there is still a problem when a new deal is being negotiated: the publisher will want to gain compensation for the new titles, and libraries will not want to reach an agreement above the 'going rate'. Ultimately, the solution may be to consider a publisher's content as a 'database' which grows in size by more content in existing journals, or new acquisitions, but where there is no need to differentiate between these different routes, and thus no need to make 'special' pricing arrangements. In the meantime, this issue was raised by a good number of our contacts, and causes aggravation out of all proportion to the sums involved – which is not to say it is not important, as it can have the effect of ratcheting up 'acceptable' price increases.

Post-cancellation access was another tricky area. There was a strong feeling that this should be extended to all content published during the period of an agreement (as is the case with some agreements), and not just to 'subscribed' content. A move away from historic print based pricing towards database pricing would 'automatically' solve this problem (as is the norm with SHEDL deals), but in the meantime it should have a higher priority, according to some. Apart from facilitating title list holding reconciliation, this would also make cancellations slightly easier to contemplate, which is no doubt one reason why Elsevier almost, but not quite, conceded this point during the last round of negotiations.

Recommendations

- 4.23.1 JC should redouble efforts to set clear timetables for negotiations, and ensure that publishers keep to deadlines that have been set.
- 4.23.2 JC should ensure as far as possible that the licence is available at the same time as the Offer Document, by conducting licence negotiations concurrently with negotiations on financial and other terms.
- 4.23.3 JC should promote attractively-priced subject options in deals.
- 4.23.4 JC should work with publishers to overcome the problem of transfer titles, moving towards a database solution where possible.
- 4.23.5 JC should negotiate for comprehensive post-cancellation access, again moving towards database solutions.

4.24 Should Jisc Collections say no to deals?

Again, there was almost unanimous agreement that this had to be a possibility, if only to give credibility to the JC negotiating position. A slight variant on this is the single-year extension mentioned in the previous paragraph, which was welcomed by some as at least a temporary alternative. Among those with rather longer memories, the exclusion of Taylor & Francis a few years ago was felt to be a 'good thing', allowing libraries, if they were prepared to make the time and effort, to rebalance their holdings, in a number of cases by cancelling most STM content. Conversely, present Taylor & Francis policy insisting on reinstatement of

cancellations made a number of years ago was very unpopular, and was hindering more than one library we spoke to in participating in a Taylor & Francis deal.

There was also understanding, from most if not quite all libraries, of the more recent JC decision not to reach an agreement with AAAS on Science. Even among libraries that subsequently took out a subscription to Science, and most relevant institutions did, there was acknowledgement that JC just could not agree to, give its imprimatur to, any price deal that the publisher happened to come up with, and that a stand had to be made (by JC, if not by the libraries, pressured by research staff for whom access to Science is absolutely essential).

More generally, library staff at all levels agreed that early communication and planning was essential if and when negotiations are difficult and there is a possibility of deadlock. It is very likely to be necessary to liaise with academic staff, and in certain cases with senior staff in the university, as happened during the Elsevier negotiations. There will always be an alternative, even if most unpalatable, and preparations have to be made. There also has to be time for co-ordination, even if unofficial, so that in as far as possible libraries will 'stand firm' and not renew. These actions can only take place at director level, or at least be led by directors, including co-ordination via SCONUL and RLUK, so communication with directors as well as other staff is essential.

As the system moves towards open access, of whatever hue, negotiations may become more tense and difficult rather than less so, and the stakes may be if anything higher than they are today. While negotiations that always fail are hardly the sign of a successful organisation, it may be necessary to say 'no' rather more frequently than in the past. For this to be handled positively, communication, trust, and working closely together become ever more important.

Recommendations

- 4.24.1 JC should engage in widespread communication and consultation before saying no to deals; provided this takes place, there is strong support in the community for declining to reach agreements where there is clear failure to achieve reasonable priority negotiation goals.

4.25 'Historic print based' expenditure

Although reliance on a base expenditure of up to fifteen years ago for individual institution payments has been much disliked by libraries, and by most publishers, for a number of years, it has proved very difficult to move away from, as viable alternatives have been hard to find. If the total expenditure remains the same, then any change in the distribution mechanism must lead to winners and losers. Of course there is no intrinsic reason why total expenditure should remain the same, and a solution is conceivable whereby high spenders are charged less, and low spenders continue to pay the same or a little bit more, but that position would be hard to achieve in full.

There is no change in the basic facts of the case, but the staff we spoke to, particularly library directors, seemed much more willing than previously to tackle this anomaly, and there does appear to be a groundswell of opinion that now is the time to take serious action, particularly if there could be support from SCONUL and RLUK as well as JC. It may be helpful to do some modelling of the effects of moving away from historic spend, although this will

tend to vary publisher by publisher. The overwhelming favourite for a replacement criterion is Jisc band (or some other measure of income/size, but Jisc band is the obvious one), certainly for the large general publishers. There was a little less unanimity concerning smaller subject-based publishers, where some would prefer a weighted count of 'relevant' researchers and students in the particular subject area. Usage was definitely not preferred, see more information below.

Most felt that the process should be gradual, perhaps two or three publishers a year (this year's OUP deal is likely to move away from historic spend, we had suggestions that Wiley should also change). There would also be transition payments, so that the full effect was not felt in one year, and probably caps on how much an institution's payment could either fall or rise over a period.

A transfer to Jisc band based 'database' pricing is not without its difficulties. While much-disliked restrictions to cancellations would disappear with a move away from the concept of 'subscribed' titles, cancellation allowances have in fact been a useful way with some publishers of modifying price increases in practice, and this would have to be remembered in renewal negotiations. The move to the database concept should also improve post-cancellation access, as all content should now be treated as in effect subscribed, but there are also possibilities of reduced flexibility depending how transfer or new titles are considered: in theory, they should just be part of the database like any other content, but publishers may not see it in quite that way.

Recommendation

- 4.25.1 JC should accelerate moves away from 'historic print' and towards Jisc band based pricing for deals.
- 4.25.2 JC should undertake some modelling of the effects of the move away from historic spend.
- 4.25.3 JC should ensure there are transitional arrangements of different kinds, to ease the position of libraries that have up to now benefited from the current mechanisms, having had a low level of subscriptions a number of years ago.

4.26 Usage based pricing

This was almost unanimously disapproved of (with the possible exception of minority subjects, or very small institutions – although the latter would have a low Jisc band rating in any case) as a basis for payment. The most common reasoning relates to the disincentive effects of usage based pricing: it is unacceptable to library staff that the more successful they are in opening out content to students and staff, the more they have to pay for that content. There were also concerns that usage tends to rise year by year (though some were reporting a plateau in usage, and even some falls for particular resources); that by its nature usage was unpredictable and this should not be converted into unpredictable pricing; and that usage data, although COUNTER compliant, is still in the hands of the publishers – 'there is a lack of visibility which I find troubling' was one comment.

Recommendation

- 4.26.1 JC should continue to oppose usage based pricing where suggested by the publisher.

27

4.27 Duration of licence agreements

There was almost unanimous agreement that three years is an acceptable and appropriate term for most of the larger agreements. A good number were prepared to go for four or five years for the larger publishers, if financial incentives were sufficient, and provided that suitable opt-out arrangements were in place. It is in fact rare for opt-outs to be exercised, but their existence provides both assurance and insurance for libraries should problems arise. Three years was considered a maximum for more subject-specific resources – should institutional priorities change – while one year was also quite acceptable for smaller or newer providers, to test out demand etc. A one-year extension to existing deals, where negotiations were proving difficult for one reason or another, was also acceptable in most cases. A number of smaller institutions might tend to prefer single-year deals, but even most of those were happy with three years, provided opt-out was possible.

Recommendation

- 4.27.1 JC should maintain emphasis on importance of opt-out clauses.

4.28 Offer Document

In general, libraries were happy with the layout and content of the Offer Document available at the successful conclusion of negotiations (with the inclusion of 'marked' Negotiation Criteria specially mentioned by several). While it was noted as complex by some, most recognised the necessity of complexity on occasion, and praised the clear and consistent layout adopted for all NESLi2 agreements, sometimes citing this as a model for other JC agreements. There was a call for more essential information to be presented at the start – a sort of Executive or Key Point Summary. While this could be investigated, it is hard to see how this could be achieved without compromising essential detail. There was some demand for 'case studies', detailing the impact on different libraries; these are included on occasion. Research Council library staff noted that it was not always clear whether or not RCs could participate. Smaller libraries, where individual staff have many different responsibilities, found it hard on occasion to read through and make decisions in a timely way, and asked if documents could be tailored, perhaps by Jisc band. Again, this could be investigated, but in most cases it might not make much difference to the document length, and could cause considerable extra work for hard-pressed JC staff, perhaps delaying availability of the Offer Document. Delay would not be popular, as the availability of the Offer Document at the same time as negotiations are completed was important indeed vital for many.

Recommendation

- 4.28.1 JC should monitor Offer Document presentation, taking account of comments where appropriate.

4.29 Value for money

In general, there was recognition that NESLi2 deals do offer value for money, which is not the same as saying they are affordable, or that the prices charged are the most appropriate (from the library point of view). Many comments continue to refer to cost/download, and the £1/download figure that has been used for a number of years. JUSP was praised as a source of easily comparable usage statistics. Doubts were expressed about the use of particular benchmark figures: with increasing usage the cost/download figure should be

decreasing on a regular basis; usage varies widely from subject to subject, etc; and about raw usage statistics in general – what is the relative value of different kinds of usage? how dependent are usage statistics on the discovery system employed by the library? etc. Some prefer qualitative evidence of value for money, seeking feedback from students and researchers on the importance of the availability (and discoverability) of a wide range of e-resource content.

Value for money is also important in the context of budget bids, and the need to demonstrate savings, financially and in staff time. Savings calculations are not straightforward, and depend on assumptions made. JC annual calculations on savings were known by some interviewees, though perhaps not many. JC should publicise the availability of these figures more widely. Even more importantly, the basis on which they are calculated should be made clear; those who did know of the figures were often rather sceptical of the calculation methodology. It would also be helpful if figures were available on an individual institution basis, which has happened on occasion. This may well have staff resource implications, unless it is a relatively simple matter to calculate by institution.

We did ask other consortia how they measured savings achieved. The majority did not attempt to quantify this, but a number said they were considering introducing measures. Last year's review of the Canadian consortium CRKN suggested a number of measures, which JC might like to consider, including longer term price comparisons, comparisons with other international consortia (this is hard to do, but ICOLC gathers some annual price increase information), and a survey of members to make sure that the consortium discount is at least as great as discounts that individual institutions can negotiate (perhaps difficult in the UK context, where there may not be much site-specific negotiation, at least with the larger publishers).

Recommendations

- 4.29.1 JC should emphasise availability of annual savings figures.
- 4.29.2 JC should include full details of calculation methodology, and review methodology if required.
- 4.29.3 JC should make available savings calculations for individual institutions, unless the staff resource implications of this are excessive.
- 4.29.4 JC should consider other measures, including international comparisons.

4.30 Business models

Most NESLi2 deals operate on an opt-in basis. This was recognised as a weakness by a large number of library staff, at different levels, but there was on the whole a feeling, among English library staff, that a closed consortium for England would be very difficult to manage, given numbers and institutional variation, leading to problems for example in how costs would be allocated across the membership. There were various suggestions of closed consortia that might operate for a smaller group of institutions, such as the M25 Group, or UK medical institutions, etc. RLUK is perhaps the most obvious contender for such a role, and there was some support from RLUK Directors, although this was by no means unanimous. Such support as there was leaned towards obtaining some kind of prior participation commitment from RLUK members, provided negotiating criteria were met, with any agreement negotiated by JC along these lines to be open to all HEIs.

There could also be a 'coalition of the willing' consortium, with some kind of commitment by institutions interested in a particular deal, but it is hard to see how this varies very much from the present position. In practice, most existing customers do renew deals from one period to the next, and publishers will be factoring this into their negotiating positions. This option would only be more influential, if in its absence there was a greater likelihood that libraries would fail to renew a particular licence.

As is well known, Scotland and Wales do have closed consortia for some deals, although this does not appear to be a priority for Northern Ireland, given just two HEIs there. In order to explore the issue further, the positions of the Scottish Higher Education Digital Library (SHEDL), and to a lesser extent of the Welsh Higher Education Electronic Library (WHEEL), were examined more closely, to see what lessons, positive or negative, could be drawn from their activities in recent years.

The Scottish Higher Education Digital Library (SHEDL) initiated its first three publisher deals, negotiated on its behalf by Jisc Collections, in 2009, following a time of preparation, and a feasibility study conducted by John Cox. There are now agreements with 18 publishers and information suppliers, covering e-books, databases, video content, OA content, e-conference proceedings, and newspaper archive material, as well as e-journals.

In almost every case, the agreements (so far) apply to all 18 Scottish HEIs. Access is also available to the National Library of Scotland and the National Museums of Scotland in some cases, and there is one joint agreement with NHS Scotland. The agreements involve a single invoice, which then has to be allocated to individual institutions according to a process agreed by members. Some agreements are negotiated by Jisc Collections staff, others by SHEDL library staff. APUC, the Scottish HE/FE purchasing consortium, has no direct role in SHEDL, but does maintain an interest, and is closely involved in other content procurement negotiations. An e-book agreement has recently been reached which selects aggregators from whom to order e-books, but also, as a separate lot, provides access for Scottish HE libraries to e-books from Elsevier, OUP, Palgrave, SAGE, and Wiley.

There is a complex governance structure, with SCURL (Scottish Confederation of University and Research Libraries, with director-level representation) at its apex, including the SCURL Business Committee, the SCOPNet Steering Group (bringing together all HEI collaborative procurement effort in Scotland), the SHEDL Steering Group, and the SHEDL Working Group. This structure is in the process of being simplified, but the point is, in the context of this Review of NESLi2, that SHEDL requires considerable commitment and staff time at all levels, and considerable support from HEI library directors (SHEDL is in effect the number one priority of the current SCURL Strategy and Plan), in order to function. Its inauguration required, and received, support at both director and e-resource manager level in all, or almost all, Scottish HEIs. The directors and the e-resource managers all knew and trusted each other well from other meetings and projects: this is possible in a small country like Scotland (or Wales), but is much more problematic in a large diverse community such as HEIs in England.

The rewards for this commitment are substantial. SHEDL is quoted favourably as an example of a shared service in action by key bodies such as the Scottish Funding Council and Universities Scotland, and it is politically important for Scottish HEI libraries to be seen to be working together. The universal access provided by SHEDL agreements for researchers and students in Scotland also is much valued in an atmosphere of collaborative research and study. The financial terms of the deals benefit from the single invoice aspect, and there has

been innovative negotiation on terms both by JC staff and by relevant staff in Scotland (and in some cases by the publishers). Because there is no absolute necessity for an agreement with a 'new' publisher to be signed, negotiations can continue over more than one year until the 'right' terms are reached. SHEDL has also been able to say 'no' if the terms for renewal are not satisfactory. The existence of SHEDL has brought relevant library staff together; enabled them to gain experience – negotiations in many cases are allocated to individual staff, at least to act as liaison and adviser, but also in some cases to participate in at least initial negotiations; and encouraged working together on other procurement projects in an effective way.

However, there are also costs which cannot be ignored. The problems of allocating payments do not go away. Allocations continue to be based mainly on existing expenditure (i.e. historic cost in many cases) although there has been some movement towards Jisc band based allocation, and can cause dissension and controversy among members. The overhead of staff time involvement at different levels is substantial, and there is now a part-time administrative post carrying out some of the necessary work. The effort to maintain buy-in from all Scottish libraries to all deals is considerable (even when for particular institutions payments for a deal are very small), and is a continuing discussion point at SCURL Director meetings. It may be that there will need to be more flexibility on this point in the future. There is no evidence of top-slice funding of any sort becoming available from the Scottish Funding Council, despite its approval of SHEDL and despite the Finch recommendation on the provision of national deals during the transition to open access. Finally, there is ongoing debate on the respective roles of Jisc Collections and SHEDL, a concern to reach the proper balance, and a concern not to duplicate work carried out by Jisc

WHEEL is of more recent vintage than SHEDL, and has just two agreements, with OUP and, from this year, SAGE. There are 12 member HEIs. As with SHEDL, negotiations are carried out by Jisc Collections on behalf of WHEEL, and the issues, benefits, costs and controversial aspects are similar to SHEDL. There are suggestions that SHEDL and WHEEL should work more closely together.

Returning to the context of the current review of NESLi2, there are various lessons from the paragraphs above. Most importantly, there is no way that a closed consortium in England will spontaneously happen. If it were to come to pass, it would require much preparation, many meetings, much organisation, and much trust and working together. It is almost inconceivable that there will be sufficient pressure from below for this to be achieved in England, given the number and diversity of institutions. The only possible way to make progress, should that be desired, is by means of pressure from above. At best (in terms of achieving this particular goal), this would involve a form of top-slicing that would greatly help in getting a good deal. And it is worth saying that we found no evidence from our discussions with international consortia, admittedly a small sample, that closed consortia worked without some central provision of funding). But even if top-slicing as such were not possible, a strong steer from HEFCE (or even from BIS, given the Finch recommendation) would have an effect.

In its turn, this steer will not come without pressure from Jisc Collections working with other bodies such as RLUK and SCONUL. This review considers the case for a closed consortium in England to be not proven, but because the arguments have continued for a number of years, because of the existence of SHEDL, and because of the Finch recommendation of central provision, the authors would recommend that EIRWG and/or JC convenes a meeting of a select number of RLUK and SCONUL Directors to decide whether or not, at least for the

foreseeable future, to pursue some form of closed consortium, and if so how this is to be achieved.

It may still be possible to be less ambitious and see if a closed consortium might work for specific resources, such as Web of Science (for which there is a SHEDL deal) or Science, and JC could investigate this further with EIRWG.

Recommendations

- 4.30.1 JC should consider convening, probably via EIRWG and alongside RLUK and SCONUL, a meeting of Library Directors to come to a firm decision on whether or not to pursue national deals; if the decision is affirmative, a clear pathway should be set out on how to achieve this aim.
- 4.30.2 JC should consider, with EIRWG, the prospect of a closed consortium deal for specific resources e.g. Web of Science, and/or AAAS/Science.

4.31 Elsevier's SciVal/Pure

Having been aware in recent years that Elsevier had been approaching senior management at universities with the aim of encouraging them to use services that help them with the assessment of their institution's research performance, for example SciVal and Pure, one of our questions to library directors was whether their institution had recently been approached in his way. Most of the directors we interviewed indicated that their university had been approached during the last two years or so, and in one of our Focus Group meetings two universities confirmed they had also been contacted by Elsevier. In some cases library directors do participate in the meetings or are consulted by senior management. This would appear to be the trend, with a growing recognition that library staff do have an important contribution to make in these discussions. A number of institutions do use the Elsevier services, or those of Thomson Reuters, its main competitor in this field.

Although Elsevier will not welcome this approach, it may be worth attempting to take into account all expenditure on Elsevier products during the next round of negotiations with the company. In addition to SciVal/Pure, significant sums are spent by institutions on Scopus, e-books, Embase and other Elsevier products, and negotiated discounts may be possible.

Recommendation

- 4.31.1 JC should consider negotiating on total Elsevier expenditure during next round of negotiations with the company.

4.32 Subscription agents

Libraries have mixed views on the position of subscription agents in the NESLi2 landscape, although continuing to value agents' services in the wider acquisitions process. Our interviewees said they were essential for the long tail of single title orders, which are not going to disappear. For many libraries they provide additional services relevant to some NESLi2 deals, including controlled invoicing, financial information on expenditure by publisher, pricing information, subscribed title records, and others. In some cases, libraries use EBSCO in particular as a Knowledge Base and a Discovery Service, linking to KB+.

However, others said that administration is easier ordering and invoicing direct with JC, and if there are access problems it is more straightforward to go direct to the publisher rather than via the agent. There were comments that 'agents don't contribute to the process, and can't remain involved in the e-deals medium much longer', 'they are becoming marginalised, only a conduit for money'.

The most common reason expressed for continuing to use agents for NESLi2 deals was that the journals agreements with the regional purchasing consortia were volume based, and so taking large amounts of expenditure on NESLi2 deals away from the agent, and diverting it direct to JC (or even to the publisher), might well lead to a reduction in discount. This is a good argument, particularly when there were continuing print subscriptions as part of the NESLi2 deal (though now more and more are e-only, and moving from subscription-based to database pricing), but only in so far as publishers continue to offer agents a discount for this kind of business where it appears that agents offer no value-added service. As can be seen from our interviews with publishers, it is not clear that publishers will maintain this discount. One of the agents expressed unhappiness at the extent of charges made to the agent for inclusion of their agreement in the regional purchasing consortia offerings.

If there is no financial incentive from publishers, then why would agents offer the service, or at least why would they include it in the totals available for volume discount in the regional consortia agreements. It may be that the system will eventually consist of direct payments at good discounts to JC (or the publisher) for large e-only deals, and increased payments to agents for the service, which will still be required, of providing subscriptions to the long tail of single titles.

However, the above position has not yet been reached in many cases, and a large number of libraries would like to continue using agents – in JC's 2013 Satisfaction Survey, in answer to the statement 'Ensuring my subscription agent can process NESLi2 orders is important', 15% said Very Important and 45% said Important. This is not too dissimilar from our interviews, where the split between those preferring to use agents, and those preferring not to use them, was about half and half. The recent OUP agreement, where libraries could go via an agent at an additional cost, highlighted the issue for some, and this was referred to in our interviews.

Given that there are mixed views on the place of agents in the context of NESLi2, it would seem best to keep to the current arrangements where single payment deals are negotiated where there are reasonable savings available by doing so. Single payments via JC would be quite difficult to justify for the largest deals, Elsevier and Wiley, though, given the expenditure involved and the possible effect on discounts, in view of the way that purchasing consortia deals are currently structured.

Turning to the international consortia, the consortia we interviewed did not really make much use of subscription agents (although the number is small). In almost every case, the consortium negotiated with the publisher, invoiced the libraries direct, then paid the publisher.

Comments from our interviews with the agents are recorded in Appendix 5, but it should be noted here that agents are not pleased with the present position, particularly with reference to JC's single payment agreements and JC's encouragement to publishers, as the agents see it, to 'transfer' the agent discount to the NESLi2 agreement. The agents would like to review the general situation with JC. If a meeting has not been held recently between JC and the

agents, it may be time to do so. One specific query relates to communication, with comments on delayed information on agreed deals at times.

Recommendations

- 4.32.1 JC should maintain the current 'mixed economy', with a number of single payment deals where reasonable savings are possible, and some deals with payment available via agents, especially the larger deals, and those where there is likely still to be some print content.
- 4.32.2 JC should consider with EIRWG meeting with the subscription agents, if this has not happened recently, to allow communication and information exchange, to see what developments together might be possible.
- 4.32.3 JC should ensure that relevant details of agreements, including the conclusion of single payment agreements, are passed to the agents at the same time as they are made available to libraries.

4.33 Regional purchasing consortia

Regional purchasing consortia play a central role in negotiating contracts with the subscription agents for the supply of journals, online and print, ordered on a title by title basis, which is still for many libraries a large number of titles, although representing a declining proportion of the journals budget. They also negotiate contracts for book supply, both print and electronic. The current SUPC e-book agreement is open to libraries through the UK, and was mentioned by many of our interviewees. As indicated earlier, APUC in Scotland has also recently signed an e-book agreement, both for aggregator supply, and for the supply of e-books from particular publishers.

Although our interviewees recognised the value of the regional consortia in their own sphere, they generally found it hard to envisage a role for the consortia in the provision of journal deals, given the proven expertise of JC, and the lack of experience of procurement staff in this specific area. Nevertheless, some felt that there should be more contact, at least on an exchange of information and expertise basis, with perhaps some opportunity for JC to seek more information on standard procurement law and procedures (as opposed to negotiation skills). It may also be useful to invite one of the purchasing consortia library chairs to join EIRWG (one such person interviewed felt that EIRWG's role was purely to examine deals in process, and that it had no strategic role). Regional consortia procurement staff have questioned JC's procurement expertise, and indeed in some cases the legality of NESLi2 in the light of EU procurement law, and it may be useful for JC to seek more information, and reassurance, on this, if this has not been done already (if it has, there should be information on the website). This might be via the regional consortia, or perhaps better via an independent expert.

Library staff generally reported that JC was accepted by university procurement staff as an appropriate body through which to place orders, in an environment of increased regulation of procurement activity, but there were a few cases where difficulties had been encountered, overcome but sometimes repeated. This seemed to be more prevalent in Scotland, partly because of history – APUC, the Scottish purchasing consortium, was set up following a full-scale national enquiry, and has a high profile within HE and FE, and also much support within the Scottish Funding Council. It may be worth JC approaching the SFC, to clarify its position, after consultation with relevant library staff in Scotland.

As with subscription agents, comments from purchasing consortia staff are recorded in an Appendix, but there was comment on a lack of strategic information on the JC website, including funding information, the JC overall strategy, a workplan, objectives, staffing, savings achieved, and negotiation criteria, asking for greater transparency. Some information is available, and reorganisation is still working its way to completion, but it may be that the JC website should in due course include more information of this type, which would also be useful to library directors and publishers.

Recommendations

- 4.33.1 JC should consider inviting an independent review of its procurement activities, in terms of expertise, legal position, and compliance, and should publicise findings.
- 4.33.2 JC should consider with EIRWG meeting with regional consortia representatives, if this has not happened recently, to allow communication and information and expertise exchange, to see what developments together might be possible.
- 4.33.3 JC should consider appointing one of purchasing consortia library chairs to EIRWG.
- 4.33.4 JC should consider liaising with the Funding Councils, including the SFC, to confirm that it is recognised as an appropriate negotiating body in the area of e-resources.
- 4.33.5 JC should include more strategic information on its website, as the reorganisation moves towards completion.

4.34 The NESLi2 Model Licence

The Model Licence is seen by library staff as a key strength of NESLi2 in particular, and Jisc Collections in general. There was approval of the way that the licence is regularly updated, even if staff did not necessarily know about the amendments in detail. There was not much appetite for library staff to be involved in the updating process, with almost all happy to trust JC and EIRWG to take responsibility for this, provided that information is released, presumably on an annual basis, on any amendments that have been introduced.

There was a recognition that there are almost always slight, sometimes not so slight, variations from the Model Licence in the actual agreements reached with publishers, and that these are outlined in the Offer Document. There was concern that it is sometimes not easy at a glance to see differences between licences, and how these might affect actual behaviour by library users, etc. In this context, the provision of licence information on KB+ in an easily readable tick-box format was much anticipated, and will be greatly welcomed by the community. There was a concern about delayed release of the licence following agreement on the substantive terms of a deal, but that is a rather different point which has been covered above.

Particular licence clauses elicited some comment. There was a strong feeling that publishers should not be permitted to introduce confidentiality clauses into agreements (no doubt particularly in mind as a result of the current FOI requests to institutions, but strongly supported as a general principle). The ban on access by users from outside the UK in another publisher's agreement was also heavily criticised, as unenforceable apart from anything else. A more liberal definition of authorised users was encouraged, particularly with reference to collaborative research, but also in the context of the importance of knowledge transfer in the current higher education landscape. Access for alumni was supported particularly by library directors, as the importance of maintaining relationships through the life cycle is

becoming more important to universities. The same principle applies to access for retired staff. Data and text mining was mentioned by a few, with a suggestion that such specialised clauses would benefit from outside advice from experts in the field. Finally, compliance with licence terms was an issue for some, for example in regularly providing title lists to resource discovery system suppliers; and in checking that OA articles in hybrid journals were actually freely available, according to the correct Creative Commons licence conditions.

In interviews, we asked particularly about the complications caused by the growing importance of partnership arrangements with other institutions, in this country and internationally. JC's Decision Tool was warmly welcomed, with most of our interviewees aware of its existence, and a number having made use of it, echoing the findings of JC's recent Satisfaction Survey. There was also praise for the helpfulness of JC staff in this context. A very few libraries have paid, usually small, additional sums to publishers. The very wide variety of arrangements and the imperfect communication systems within HEIs, remain the major problems in this area. Libraries often do not hear about new partnerships until very late in the day, or perhaps not until a student complains about an access failure, although our impression is that the situation is improving with more libraries insisting that they are, and being accepted as, part of the information loop.

One staff member suggested that they should report annually to JC on the number of students in particular categories at particular partner institutions, for the information to be added to their licences, but others felt that this information is very hard to come by, that it is very changeable, and that it would be staff time intensive to gather and provide this on an annual basis. We were also reminded of the Jisc Identity Management Taskforce http://idmco.jiscinvolve.org/wp/taskforce/ , and its potential importance in this area. If the variety of categories of students and staff can be simplified, and identified, authentication issues become manageable, numbers become visible, and rational and efficient (taking up much less staff time) solutions become possible.

Recommendations

- 4.34.1 JC should ensure that changes to the Model Licence are publicised to the community in a regular way.
- 4.34.2 JC should facilitate the provision of licence information in KB+ as soon as possible.
- 4.34.3 JC should not agree to the insertion of confidentiality clauses in agreements.
- 4.34.4 JC should emphasise access for alumni (and retired staff) in negotiations.
- 4.34.5JC should re-examine definitions of Authorised User.
- 4.34.6 JC should ensure compliance with licence conditions signed up to (e.g. title list provision, OA publication as paid for)
- 4.34.7 JC should continue to support libraries on partnership access issues.
- 4.34.8 JC should liaise with the Jisc Identity Management Taskforce, emphasising (among other things) relevance to partner institution licensing.

4.35 Open Access

Almost every library supported JC involvement in OA development, specifically concerning Article Processing Charges (APCs). There was recognition that it was strategically vital for JC to ensure its role in this area, in the post Finch Report environment, given the interest of other senior management in finance and research, and given the total expenditure, bringing together subscription and APC payments. Government endorsement of JC's role in

negotiating with publishers on the total cost of subscriptions and APCs at an individual institution level, in the form of David Willetts' letter of 23 January 2014 to Dame Janet Finch http://www.researchinfonet.org/wp-content/uploads/2013/02/BIS-Transparency-Letter-to-Janet-Finch-One-Year-On-Response-January-2014.pdf, was welcomed, and JC's Total Cost of Ownership (TCO) project seeking to implement this was endorsed. The RLUK paper on APCs http://www.rluk.ac.uk/wp-content/uploads/2014/02/RLUK-stance-on-double-dipping-Final-November-2013.pdf issued at the end of February also supports this approach. There was some support for the provision of additional staff resource for JC, should this be required for effective negotiation.

There was comment on the high cost of APCs, particularly in the hybrid situation. One library director said that while profit margins of 30-40% for some publishers were excessive, that paled into insignificance beside the 900% profit margin on APCs i.e the price charged for an APC is around ten times the cost of producing and making available that article (though that may exclude overhead costs of one kind or another).

Unsurprisingly APC payments were less of a concern to staff in the smaller, lower-banded, institutions to whom we spoke, but they also acknowledged that this was a legitimate area of operation. A number, not only in smaller libraries, cautioned JC to remember their 'core business' and not to let the new emphasis on APCs detract from the traditional need to ensure the best deals possible on subscription prices with the larger journal publishers. There was also a concern, although this was not pursued in our questions, that Gold OA should not be the only avenue to be considered, and that Institutional Repositories/Green OA should continue to have an important role (as exemplified in HEFCE's announcement in March re OA requirements for the next REF http://www.hefce.ac.uk/pubs/year/2014/cl072014/#d.en.86764). JC does not ignore Green OA, and Jisc maintains a close interest, but JC's core expertise lies in the area of negotiations with publishers, and thus is more oriented towards Gold OA/APCs.

On the whole, our interviewees confirmed that take-up of RCUK allocations for APC payments has been relatively slow (though this has not been the case in at least one institution we spoke to: UCL have made around 2000 APC payments in the last year), but this was not expected to last. Using the example of the Wellcome Trust's OA policy, compliance was fairly low in the first year or two, but has grown very substantially since then. In terms of the location within HEIs of administration of APC payments, we could see a definite trend towards this responsibility being placed with the library. This appeared to be the case in virtually all the larger institutions we contacted, and many smaller ones as well. There is additional workload, but also greater integration and liaison with research staff and the Research Office. There is perhaps more variety in organisation internally within the library, where there does not always appear to be close co-ordination between APC staff (perhaps historically linked with the Institutional Repository) and e-resource staff. This may well change.

There were mixed views on the extent to which JC has a role in supporting libraries directly in the administrative processing of APC payments. The Jisc APC pilot has been running over recent months using Open Access Key (OAK) as technology partner, and is due to finish this summer; no doubt experiences from the pilot will inform future action. While many are still using spreadsheets to control this activity, there is likely to be demand for a more sophisticated tool with links to researcher and funding information, and to publishers, as volume grows. A number of commercial companies, including subscription agents, are developing services in this area, and some staff felt that it was appropriate to rely on the

market to develop the best options, although there were others who were reluctant to see the involvement of the commercial world with so much confidential and potentially valuable data.

There was a feeling among some that JUSP and KB+ were both very useful shared services, and appropriate arenas for JC involvement, whereas administration of APCs was more of an operational area. There was more agreement that JC had a role in developing best practice, encouraging exchange of experience, etc. Nevertheless, although not universal, there was quite some demand for JC hands-on involvement. JC will have to decide at a strategic level whether it is necessary to devote scarce resources to this: if so, the decision and consequent action would have to be rapid, to avoid being overtaken by the commercial systems that are already, or nearly, in place. There would also have to be a decision whether to act alone (when development may be slower, with a need to develop in-house expertise), or in partnership with another company (which might expose JC to accusations of favouring one supplier over another in this field).

Recommendations

- 4.35.1 JC should vigorously pursue its TCO project, and activate negotiations to include APCs as soon as possible.
- 4.35.2 JC should pursue such negotiations as far as possible on an individual institution basis, although the models to do this may well vary publisher by publisher.
- 4.35.3 JC should reassure members that APC negotiation will not be at the expense of negotiation on subscriptions.
- 4.35.4 JC should continue to support and develop best practice on implementation of various post-Finch policies, and encourage exchange of experience.
- 4.35.5 JC should consider whether or not to develop its own APC administration service (and/or in partnership with other(s)).

4.36 NESLi2 as a brand

NESLi2 as a name follows on from NESLI, but is a continuation in another form of the original Pilot Site Licence Initiative (PSLI) of the mid 1990s, the forerunner of all national negotiations with the large journal publishers. When asked, almost all our interviewees felt that the name was no longer relevant (a number did not know what the initials stood for), that it potentially encouraged confusion, and that Jisc Collections was the strong brand under which all agreements should be sheltered. A few cautioned that the big expenditure remained with the large journal publishers, and any withdrawal of 'NESLi2' should not lead to less concentration on these negotiations, but almost all were in favour of 'retiring' NESLi2. This recommendation is not quite as simple as it sounds: we expect that for example there would still be a demand for a separate tab for 'journals' in MyAccount, and we alluded above to the continuing need to identify 'light-touch' SMP journal deals, but nevertheless it should be possible to cater for such elements within an overall Jisc Collections brand.

We also asked what would happen if Jisc Collections no longer existed. By far the majority response was to say that it would have to be re-invented. A number mentioned the regional purchasing consortia, but without any obvious enthusiasm (there was no mention of subscription agents). RLUK was mentioned, and in a different context SHEDL, but again the feeling is that such organisations are complementary to JC, and not to be seen as a replacement for it. One or two suggested that, as OA grows, JC might wither away, but this

seems unlikely as payments (APCs) will still be required, and databases of various sorts will still be important and not likely to be available free of charge.

Finally, interviewees were asked about future trends and developments that might influence scholarly publishing and library provision of e-resources. A list of such developments is included as an appendix – unsurprisingly Open Access was the number one topic, for both library staff and publishers – but further analysis is not required as part of this Review. JC will of course maintain a close watch on developments, and, in conjunction with Jisc, is ideally placed to undertake regular horizon and technology scanning.

Recommendations

- 4.36.1 JC should consider removing NESLi2 as a brand after this year's negotiation season.

5.   Publisher interviews

5.1 Strengths of NESLi2

As with library interviewees, 'trust' was a word frequently used by publishers, mainly referring to the trust the library community places in Jisc Collections (JC), therefore increasing its attractiveness to publishers as a negotiating partner. The single negotiation aspect was probably the most helpful 'strength' from the publishers' point of view, followed by the single licence (although there are aspects of the licence which cause concern – see below). The professionalism of JC staff, at different levels, was praised by many publishers, sometimes in comparison to staff in other consortia with which they deal : 'NESLi2 is smoothest-operating consortium worldwide' – consistency, stability, experience were words used on several occasions. The single invoice aspect was also mentioned a number of times. Smaller publishers were also pleased with the access to the market offered by SMP deals.

5.2 Weaknesses of NESLi2

Limited access to institutions was felt to be a weakness by some, although of course there is no ban on contact. The variety of institutions that are JC members was a problem, though conversely others felt that the size of the consortium was a definite benefit. Arising from variety, a number bemoaned the number of different options that had to be offered, and would prefer one simple straightforward offer. This to some extent mirrors views of library staff, many of whom would prefer a single offer, but institutional variations (together in some cases with problems caused by new/transfer titles) make this difficult. On the other hand, lack of flexibility was mentioned, although this is really the flip side of having a consortium agreement in the first place. There was some dismay about JC's 'rigid' pricing policies, although this would not necessarily be considered a weakness by the library community. The licence came in for some criticism – more detail in relevant section below. There was concern from a few publishers on the wider role of JC, one feeling that JC should be more proactive, for example in promoting and developing JUSP, while another felt that JC played too much of a 'lobbying' role and that there was a potential conflict of interest because of its 'public sector' nature, so that negotiations should be outsourced to an independent organisation.

5.3 Benefits from participation in NESLi2

All publishers felt that participation in NESLi2 had been beneficial for them, although a couple felt this was now less the case than in the past, because of the pressure from JC on price increases. Publishers generally felt that NESLi2 had enabled growth, and increased their visibility. One publisher mentioned NESLi2 participation speeding up the transfer to e-only.

5.4 Changes in perception of NESLi2 over last five years

In general, perception of JC/NESLi2 had improved in recent years. The single payment system was mentioned by a few, and a few also talked about more open debate, greater trust in the relationship, and increased professionalism.

5.5 NESLi2 Customer Service/Helpdesk

The Helpdesk is not really directly relevant to all publishers, but where there has been contact, the helpfulness and efficiency of the staff was praised. Contacts with other JC staff were also almost always described in positive terms.

5.6 Communications between JC and publishers, and communication with libraries

A number of publishers provided comments such as 'excellent' and 'outstanding', and 'rich dialogue', but there were also some that would like more communication, particularly during the lifetime of a deal, an opportunity to exchange information, updates on developments, and ideas.

Publishers were also asked about their interaction with libraries, in terms of JC and NESLi2/SMP deals. Not surprisingly, there was little feedback to publishers concerning JC itself, although what there was, was almost all positive. There was also, perhaps more surprisingly, not very much feedback from libraries to publishers concerning their own NESLi2/SMP deal (according to the publishers we interviewed). One summed up such views as there were, as 'mildly positive' – perhaps e-resource staff, with whom publishers are most likely to have contact, are in most cases unlikely to be too critical, unless there are specific problems. A couple of publishers felt that libraries should be more relaxed about the 3% 'barrier', and look more closely at value (unspecified).

5.7 Marketing for publishers

Almost all publishers felt that JC should market deals to libraries more following agreement, perhaps via joint press releases etc. This may be the practice of other consortia, although we did not particularly get that impression when we spoke to other international consortia. This has not been JC practice, and might be resented by some library staff (and reinforce the view held by some that JC sees the interests of publishers too readily, occupying a neutral position rather than working solely on behalf of the community). On the other hand, there is no bar to institutions being contacted by publishers, and library staff will expect this to some extent.

Recommendations

- 5.7.1 JC should make clear to publishers that, while JC will provide as full information as possible, the responsibility for marketing the resource lies with the publisher, who may approach individual institutions if desired.

5.8 Publishers' experience of other consortia

Most publishers said that other consortia learned from JC, rather than vice versa. There were one or two specific comments e.g. publishers can submit information (FinELib http://www.nationallibrary.fi/libraries/finelib/forpublishers.html); some consortia, for example CAUL, publish lists of library members with a range of information including library contact details.

Recommendations

- 5.8.1 JC should review whether there could be more information for publishers on the JC website.

5.9 Merging negotiations for e-journals and e-books (and other formats)

Most publishers were amenable to discussing this with JC, although there was a general preference for separate agreements (as with libraries, on the whole). One publisher said they preferred to negotiate on e-books with Eduserv, which was 'more commercially-minded'. Another publisher said they felt that different products had different routes to market, not always JC.

5.10 Jisc Collections procedures for negotiations

In general, publishers were happy with the negotiation mechanisms, and the efficiency and professionalism of relevant staff. Several mentioned the importance of starting early, of setting timetables, and keeping to them. Transfer titles raised their head several times, with one publisher saying that 'more inventive thinking needed' and suggesting JC explore different models. The desirability of moves away from historic print spend was also raised. There were a number of more specific comments, for example concerning notification of the date offer made available to libraries, and concerning input into the Offer Document, which is (understandably) not available to publishers.

Recommendations

- 5.10.1 JC should liaise with publishers on date offer made available to libraries [if does not happen now]
- 5.10.2 JC should liaise with publishers on text of parts of the Offer Document e.g. commercial terms [if this does not happen now]

5.11 Duration of licence agreements/Completion of negotiations

Three years was the most common suggestion for duration, although a few happy with up to five years if that could be arranged. Two years was also suggested, or one year (transfer titles were mentioned in this context), with one year the preference for SMP deals. One year was also mentioned if economic conditions particularly bad, or for new libraries joining a deal.

August/September was the preferred date for completion of negotiations for most, although June/July was mentioned by two or three. Again there was a comment that transfer titles are likely to delay proceedings.

5.12 Business models

Publishers had no very strong views on models, and were prepared to work with whatever model was put forward by consortium negotiators. Having said that, the relevant publishers (8 of the 17 interviewed) with current SHEDL deals said they were happy with them (not that they were likely to say anything else…), and the London Medical Schools agreement was also cited. There were arguments against closed consortia, including what happens if an institution drops out, and problems getting agreement among members; and other arguments in favour, such as ease of administration, a single payment, and fixed title lists. Generally publishers felt that an English libraries consortium would be unworkable.

5.13 Subscription agents

The majority of the publishers we interviewed are using agents less and less. The view was that, while agents may be valuable for libraries, there is little value for publishers, particularly in respect of e-deal subscriptions, with more and more libraries moving towards e-only for their NESLi2 deals. There was a feeling that agents slow the process down, provide few benefits, and some publishers may be reviewing the agent's commission for such deals.

However, most publishers suggested that they wished to let the customer choose. They acknowledged that subscription agents still played a valuable role for single subscriptions, whether print or electronic, and where there was still a print element to a broader electronic deal. Publishers commented that agents disapproved of JC offering an ordering and invoicing service for single invoice deals, and that agents were unhappy with JC taking account of the agent's discount in its negotiations with publishers.

5.14 The NESLi2 Model Licence

Publishers generally tolerated the NESLi2 Model Licence, rather than actively enthused about it. However, quite a number felt that it was too long and complex, which helped to lengthen delays in reaching agreement, often a good while after the main terms had been settled and offered to libraries. One publisher felt that their own licence definition of authorised user was more liberal than JC's. There was one comment that it had been useful to participate in a licence workshop with JC.

The most common complaint with reference to the licence was that JC did not notify the publisher if amendments were made from year to year, and the publishers felt that they were left to discover changes by themselves.

Asked about the licence and institutional partnerships, there was a divergence of views. Some publishers felt this was a growing problem, whereas others, particularly European (non-UK, non-US), were more relaxed. There was interest in the Decision Tool, although in most cases publishers handle requests on an individual basis, with at least one publisher preferring that there be no partnerships clause in the licence at all. In many cases, publishers do not worry about partnerships as long as there is authentication security and proper ID management, another reason for progressing the work of the Jisc Identity Management Taskforce. Additional university campuses, particularly in East Asia and the Middle East, do cause concern.

Recommendations

- 5.14.1 JC should flag up to publishers new licence clauses, or amendments to existing clauses.

5.15 Open Access

In terms of APCs, publishers divided into two camps. A number recognised, reluctantly or not, that JC will be negotiating with publishers on APCs and subscriptions together (especially following the Willetts letter endorsing JC's role, which was made public during the period we were interviewing publishers), and are willing to take negotiations forward. And some still felt that subscriptions and APCs should be kept separate: 'APCs are to do with authors, not libraries/consortia', 'it is too simplistic to pay for APCs out of subscription income'.

A number described their existing APC discounting or offsetting schemes, such as RSC and SAGE. One problem for publishers is that APC arrangements are often handled by a completely different department than that responsible for subscriptions.

Recommendations

- 5.15.1 JC should continue its discussion with publishers on APC/subscription offset models.

6.   Recommendations

Weaknesses of NESLi2
- 4.2.1 JC should take every opportunity to reinforce the message that it is not a 'neutral intermediary' of some kind, but is working hard on behalf of, and is responsible to, the HE/FE community.
- 4.2.2 JC should publish, on a secure part of its website, an annual review of price caps achieved in the previous year (not an easy calculation to make, given variables, options, etc), as we understand this is now available internally and to EIRWG.

Does NESLi2 cater for institutions' size, and subject mix?
- 4.6.1 JC should consider arranging for further information on the new banding system to be released.

Communications between Jisc Collections and libraries
- 4.8.1 JC should consider initiating a regular (quarterly or less frequent) bulletin for library directors, written at a strategic level by senior JC staff.
- 4.8.2 JC should attend, where possible and invited, more SCONUL and RLUK Directors meetings.
- 4.8.3 JC should consider, within constraints, holding more meetings around the UK, particularly 'general update' and information exchange meetings.
- 4.8.4 JC should investigate requirements for training for new e-resource management staff.
- 4.8.5 JC should consider merging lis-nesli-reps and jisc-collections-reps.
- 4.8.6 JC should investigate, within security constraints, lifting restrictions on numbers by institution signing up to lis-nesli-reps/jisc-collections-reps.

Jisc Collections website
- 4.10.1 JC should audit the website, taking into account above queries.

MyAccount
- 4.11.1 JC should audit MyAccount function, taking into account above queries.
- 4.11.2 JC should investigate the possibility of automated personalised emails re expiring agreements.

Selection of NESLi2 resources
- 4.12.1 JC should consider a more proactive selection process, or publicising more widely the existing process.
- 4.12.2 JC should investigate the possibility of a closer relationship with Eduserv.

SMP agreements
- 4.13.1 JC should continue to label SMP deals in some way, to indicate a 'light touch' negotiation.
- 4.13.2 JC should consider undertaking a cost benefit analysis, comparing the value of SMP deals to the community, with the cost to JC of undertaking negotiations and supporting the deals.

Merging negotiations for e-journals and e-books (and other formats)

- 4.14.1 JC should continue to explore the combination of e-journal and e-book negotiations with publishers, seeking value-added options, provided that choices remain to subscribe to either e-journal or e-book content.
- 4.14.2 JC should continue to model and experiment with solutions to the e-textbook access problem.

Particular resource categories that NESLi2 should include

- 4.15.1 JC should consider approaching again in particular legal content suppliers (and selected business suppliers, and others mentioned above) for negotiation, following a consultation process with the community (see also 4.12.1 above)
- 4.15.2 JC should, in the event of failure to reach agreement, ensure that the community is aware of this, including reasons for failure to agree.

Jisc eCollections

- 4.16.1 JC should continue to improve e-Collections functionality (as recently announced), and continue to market the resource, including the underlying motives behind its establishment.
- 4.16.2 JC should consider whether an option to subscribe to a single component could be introduced, or explain further the reasons why this would be impractical.

Jisc Collections procedures for negotiations

- 4.17.1 JC should investigate a training programme on negotiation skills for its staff.
- 4.17.2 JC should consider more community involvement in negotiations, including library directors and others, and on occasion directors of finance or other senior university staff.
- 4.17.3 JC should continue to survey users (and non-users) before negotiation with individual publishers, and disseminate the results.
- 4.17.4 JC should also consider surveying libraries more generally on forthcoming negotiations.
- 4.17.5 JC should consider, as an experiment, asking libraries for budget information for previous two-three years this November/December.

Communications during the negotiation process

- 4.18.1 JC should investigate an alternative web-based format for the Monthly Report, in addition to current version
- 4.18.2 JC should increase frequency and content level of communications where negotiations are difficult, including opportunities for feedback.

Negotiation criteria

- 4.19.1 JC should consider securely making available Negotiation Criteria and asking for feedback, including from library directors, perhaps via RLUK and SCONUL.

The position of EIRWG
- 4.20.1 JC should improve EIRWG's visibility on the JC website, and ensure that documentation is up to date.
- 4.20.2 JC should consider whether EIRWG's terms of reference need review, and they should be publicised to members.
- 4.20.3 JC should consider the balance of membership of EIRWG.
- 4.20.4 JC should consider how EIRWG members are appointed, to improve transparency.
- 4.20.5 JC should consider terms of office for EIRWG membership.
- 4.20.6 JC should consider BUFDG and ARMA membership, or attendance, at EIRWG.
- 4.20.7 JC should consider the role of EIRWG in communication with members.

Position of RLUK in negotiations
- 4.21.1 JC should maintain and proactively develop links between JC senior staff and the RLUK Executive Director and Board.
- 4.21.2 JC should consider more community involvement in negotiations, including library directors, organised via RLUK (and SCONUL) and/or via EIRWG (see 4.17.2 above)

Position of SCONUL in negotiations
- 4.22.1 JC should maintain and proactively develop links between JC senior staff and the SCONUL Executive Director and Board.
- 4.22.2 JC should consider more community involvement in negotiations, including library directors, organised via SCONUL (and RLUK) and/or via EIRWG (see 4.17.2 above)

Negotiation tensions
- 4.23.1 JC should redouble efforts to set clear timetables for negotiations, and ensure that publishers keep to deadlines that have been set.
- 4.23.2 JC should ensure as far as possible that the licence is available at the same time as the Offer Document, by conducting licence negotiations concurrently with negotiations on financial and other terms.
- 4.23.3 JC should promote attractively-priced subject options in deals.
- 4.23.4 JC should work with publishers to overcome the problem of transfer titles, moving towards a database solution where possible.
- 4.23.5 JC should negotiate for comprehensive post-cancellation access, again moving towards database solutions.

Should JC say no to deals?
- 4.24.1 JC should engage in widespread communication and consultation before saying no to deals. Provided this takes place, there is strong support in the community for declining to reach agreements where there is clear failure to achieve reasonable priority negotiation goals.

'Historic print based' expenditure

- 4.25.1 JC should accelerate moves away from 'historic print' and towards Jisc band based pricing for deals.
- 4.25.2 JC should undertake some modelling of the effects of the move away from historic spend.
- 4.25.3 JC should ensure there are transitional arrangements of different kinds, to ease the position of libraries that have up to now benefited from the current mechanisms, having had a low level of subscriptions a number of years ago.

Usage based pricing

- 4.26.1 JC should continue to oppose usage based pricing where suggested by the publisher.

Duration of licence agreements

- 4.27.1 JC should maintain emphasis on importance of opt-out clauses.

Offer Document

- 4.28.1 JC should monitor Offer Document presentation, taking account of comments where appropriate.

Value for money

- 4.29.1 JC should emphasise availability of annual savings figures.
- 4.29.2 JC should include full details of calculation methodology, and review methodology if required.
- 4.29.3 JC should make available savings calculations for individual institutions, unless the staff resource implications of this are excessive.
- 4.29.4 JC should consider other measures, including international comparisons.

Business models

- 4.30.1 JC should consider convening, probably via EIRWG and alongside RLUK and SCONUL, a meeting of library directors to come to a firm decision on whether or not to pursue national deals; if the decision is affirmative, a clear pathway should be set out on how to achieve this aim.
- 4.30.2 JC should consider, with EIRWG, the prospect of a closed consortium deal for specific resources e.g. Web of Science, and/or AAAS/Science.

Elsevier's SciVal/Pure

- 4.31.1 JC should consider negotiating on total Elsevier expenditure during next round of negotiations with the company.

Subscription agents

- 4.32.1 JC should maintain the current 'mixed economy', with a number of single payment deals where reasonable savings are possible, and some deals with payment available via agents, especially the larger deals, and those where there is likely still to be some print content.

- 4.32.2 JC should consider with EIRWG meeting with the subscription agents, if this has not happened recently, to allow communication and information exchange, to see what developments together might be possible.
- 4.32.3 JC should ensure that relevant details of agreements, including single payment agreements, are passed to the agents at the same time as they are made available to libraries.

Regional purchasing consortia
- 4.33.1 JC should consider inviting an independent review of its procurement activities, in terms of expertise, legal position, and compliance, and should publicise findings.
- 4.33.2 JC should consider with EIRWG meeting with regional consortia representatives, if this has not happened recently, to allow communication and information and expertise exchange, to see what developments together might be possible.
- 4.33.3 JC should consider appointing one of purchasing consortia library chairs to EIRWG.
- 4.33.4 JC should consider liaising with the Funding Councils, including the SFC, to confirm that it is recognised as an appropriate negotiating body in the area of e-resources.
- 4.33.5 JC should include more strategic information on its website, as the reorganisation moves towards completion.

The NESLi2 Model Licence
- 4.34.1 JC should ensure that changes to the Model Licence are publicised to the community in a regular way.
- 4.34.2 JC should facilitate the provision of licence information in KB+ as soon as possible.
- 4.34.3 JC should not agree to the insertion of confidentiality clauses in agreements.
- 4.34.4 JC should emphasise access for alumni (and retired staff) in negotiations.
- 4.34.5 JC should re-examine definitions of Authorised User.
- 4.34.6 JC should ensure compliance with licence conditions signed up to (e.g. title list provision, OA publication as paid for)
- 4.34.7 JC should continue to support libraries on partnership access issues.
- 4.34.8 JC should liaise with the Jisc Identity Management Taskforce, emphasising (among other things) relevance to partner institution licensing.

Open Access
- 4.35.1 JC should vigorously pursue its TCO project, and activate negotiations to include APCs as soon as possible.
- 4.35.2 JC should pursue such negotiations as far as possible on an individual institution basis, although the models to do this may well vary publisher by publisher.
- 4.35.3 JC should reassure members that APC negotiation will not be at the expense of negotiation on subscriptions.

- 4.35.4 JC should continue to support and develop best practice on implementation of various post-Finch policies, and encourage exchange of experience.
- 4.35.5 JC should consider whether or not to develop its own APC administration service (and/or in partnership with other(s)).

NESLi2 as a brand
- 4.36.1 JC should consider removing NESLi2 as a brand after this year's negotiation season.

Marketing for publishers
- 5.7.1 JC should make clear to publishers that, while JC will provide as full information as possible, the responsibility for marketing the resource lies with the publisher, who may approach individual institutions if desired.

Publishers experience of other consortia
- 5.8.1 JC should review whether there could be more information for publishers on the JC website.

Publishers: Jisc Collections procedures for negotiations
- 5.10.1 JC should liaise with publishers on the date offers are made available to libraries [if does not happen now]
- 5.10.2 JC should liaise with publishers on the text of parts of the Offer Document e.g. commercial terms [if this does not happen now]

Publishers: The NESLi2 Model Licence
- 5.14.1 JC should flag up to publishers new licence clauses, or amendments to existing clauses.

Publishers: Open Access
- 5.15.1 JC should continue its discussion with publishers on APC/subscription offset models.

Appendices

Appendix 1: Interviews with Jisc Collections staff

Interviews were held with a number of Jisc Collections staff in December 2013, using a set of specific questions.

In asking about librarians' and publishers' possible views on the strengths and weaknesses of NESLi2, the NESLi2 model licence was considered a strength, as was the single payment concept by some staff. SMP deals were also considered useful for librarians and publishers. Libraries in general appreciated the shared services aspects of JC, outsourcing negotiations, while publishers approved of the mirror image of this, negotiating with a single professional body on behalf of a large group.

Weaknesses from the library point of view included the slowness in conclusion of negotiations and the late availability of licences. There was also a comment that there was to some extent more negative feedback from librarians in surveys, although survey feedback remains very positive (recording opinions mainly from e-resource managers rather than from directors).

Publishers' views on the weaknesses of NESLi2 included the 'non-reward of previous good behaviour' (for example zero price increases) and the difficulties for them to charge more for more content, with some saying they could earn more outside of NESLi2 (for example, AAAS 50% more outside). More flexibility on this would be helpful. Some publishers also felt that they were being 'kept away from' their actual customer base in libraries.

Asked if views had changed over recent years, there was an impression of growing doubts among some library directors on whether JC were negotiating the best-possible deal available, initially from RLUK but also including some non-RLUK libraries – although there are problems as take-up grows and the deals mature, with a tendency on occasion to forget the favourable aspects of previous deals. Publishers' opinions were harder to gauge, as the situation changed from year to year with different deals coming up for renegotiation.

JC staff's own views on strengths and weaknesses (as opposed to how they felt library staff and publishers viewed JC) echoed much of the above. In addition, there was praise for the exceptional commitment and productivity of staff; and a recognition that JC is looked on favourably internationally as an example of a successful consortium. Concerning weaknesses, the increasing diversity of the sector was quoted, with greater institutional competition, and a stricter demarcation between different sub-sectors (research-intensive, teaching-only, etc). Publishers are also becoming more competitive, and perhaps willing to test whether better deals, from their point of view, are available by going direct to customers rather than via a consortium.

Some JC staff felt that the website needed updating, and that content was not always completely current. There was a suggestion that a summary table on the website giving current negotiating status of all NESLi2 deals, including single payment applicability, would be helpful. Use of technology should be standardised within JC, and selected technology, for example Huddle and the new *[or proposed? Tony]* CRM system, should be used by all staff. Communications within JC could, as always in any organisation, be improved, including more templates for licensing managers and better 'paperwork' in general. Because of the different

'environment', staff at North Leigh may work more closely together than staff at Brettenham House.

With regard to JC customer service and the Helpdesk the response was 'no complaints from librarians (or publishers)', and the helpdesk appears to be considered a big strength, compared with most international consortia, many of whom wish they had JC resources/organisation. There is a lack of co-ordination between lis-nesli-reps and other JC lists and these should be linked.

There was a recognition that communications between JC and libraries could and should be improved, for example in explaining savings, both at a community and at an individual institution level, and expounding the benefits more generally of the work of JC. There is a need to manage expectations on what is possible, requiring openness, honesty, goodwill and trust on all sides – these qualities are by no means lacking in the community, but a more proactive approach by JC is required. There was also a recognition that communication with publishers tended to be at an individual level, and that a more strategic approach may be appropriate (perhaps along the lines of the current discussions with publishers on APCs).

On selection of resources, it was noted that new SMP publishers are mostly approached by JC staff, with occasional suggestions from libraries and publishers. SurveyMonkey is useful for feedback on relevance of resources and value for money, and it was suggested that further feedback could be via consultation with known 'experts' in libraries. Value for money was generally felt to be good, though not always perceived to be so by libraries.

In addressing the possible demand to include access not only to journals but also to e-books and other e-resources, some staff felt there was relatively little demand from both libraries and publishers, although e-books and aggregator databases for example may be more relevant to lower-banded institutions. Reference was made however to 50 FE colleges participating in a pilot for Springer e-books and e-journal, and the FE Kent Consortium (KAFEC) pilot with SAGE. More information from FE colleges was needed on how much they could afford for publisher agreements.

With regard to negotiations with publishers, more relevant information should be available prior to negotiation, and more supporting information (from libraries/EIRWG) should be used to help the negotiations: JUSP has been helpful, but it is important to select the appropriate measures from within JUSP options. There should be more structured general information on the institutional background, for example on public sector budgets, and sectoral institutional differences within HE and FE. It may be necessary to review the current checklist of pre-negotiation actions available to JC staff. There is some variation in practice: for example, some negotiators use SurveyMonkey to get feedback/info from libraries (subscribers and/or non-subscribers) in advance of negotiations, while others rely more on telephone contact. More work is required on pricing aspects e.g. bigger increases if more content may sometimes be justified. Some publishers are asking for more feedback from subscribers (US societies in particular find it more difficult to reach subscribers).

The Negotiation Criteria are currently not seen or influenced by the community, and it may be that this should change. The procedures at CRKN, the Canadian consortium, were cited as an example of greater community involvement, costly in terms of resource, but worth it in terms of community commitment to the process.

In terms of strengthening JC's negotiating position, there were suggestions of including more library staff in this process, at particular stages, either library directors or EIRWG members (or a combination), citing the example of SHEDL and some other negotiations. The inclusion of APCs may strengthen JC's position, by opening up different options for the negotiation process.

On the question of models, top slicing would undoubtedly strengthen JC's position, allowing a move towards a closed consortium, but this was felt to be unlikely to happen. Given that NESLi2 is unwieldy because of size, it was felt that opt-in has been as successful as possible, given its limitations, although SHEDL and WHEEL can offer good value with all-in commitment, and a single payment, plus other benefits such as more content, and extension on occasion to other sectors. It was suggested that a breakdown into regional consortia could perhaps be considered, although this could lead to JC staffing implications. More likely perhaps were the institution of a few more specialist deals, for bodies such as the London Medical Libraries. It was noted that SHEDL-type deals require a high level of commitment from libraries and institutions to set up and maintain, and are not an easy option.

The licence is reviewed and updated every year and Jisc Collections is trying to complete this earlier, to have the latest version available for negotiations. JC plans to seek views from libraries on a suitable deadline. The website is not good at providing clear licence information for particular deals, but KB+ will be exposing licence terms more openly to libraries.

Not many libraries have approached JC regarding open access developments, though there is some concern at EIRWG and management level about this and there has been some uncertainty within JC on who deals with OA – e.g. clauses relating to APCs in the licence have been volatile in recent years, and there was a comment that some JC staff have less influence on the content in licences than in the past. Interest in OA/APCs is growing fast, however, and at least the more research-oriented universities are now very concerned. There is a strong view that JC has to be involved in this whole process (APC negotiations, double-dipping, institutional administration) in the new environment, and that it needs to maintain its presence and be visible to other parts of the institution such as Research PVCs, Research Offices, Directors of Finance, given that publishers may very likely be looking well beyond libraries, negotiating directly with research departments, or, for example, BUFDG. There was also a sense of growing demand, from some libraries, for JC to become involved in the administration processes relating to APCs – pilots are continuing in this area.

There was felt to be no particular reason to separate out e-journals under NESLi2, especially as there are increasingly other resources and formats under negotiation, and it may be time for the NESLi2 brand to be subsumed within the stronger 'Jisc Collections' brand.

Appendix 2: British Library

As part of our efforts to seek the opinions of stakeholders, we interviewed British Library staff in February. The British Library, playing its part in government expenditure reductions, has had its subscriptions budget cut by £8m in the last few years, and only has one NESLi2 agreement, for Project Muse. In general, it is looking for different licensing options than HE, for example the rights to ingest digital content and to sell articles, and in most cases finds it easier, as the national library, to negotiate directly with publishers. (The National Library of

Scotland is in a slightly different position, and has found it useful to participate in a number of SHEDL agreements).

BL users prefer having access to content on the same platform, perhaps more so than many in HE, and are quite happy with EBSCO or ProQuest databases, which are less frequently covered by JC agreements.

The British Library has 25,000 external business users, and finds extensive text/data mining rights to be vital. These should also be important to HE, including no restrictions on commercial reuse, given the importance of the knowledge transfer agenda to HE in the current climate.

There was a suggestion that the BL is working more closely now with other senior bodies – such as Universities UK, Research Councils UK, RLUK, Wellcome – but less frequently with Jisc or Jisc Collections. This may well be because of recent reorganisation at Jisc, but Jisc/Jisc Collections should play more of a policy role, and the BL would be very happy to work with Jisc Collections and HE in developing the case for libraries, for example in case studies, training in evaluating sources, etc.

Appendix 3: Research Council libraries

The STFC Library Services Manager was interviewed, and staff from the British Geological Survey (NERC) and Rothamsted Research (BBSRC) attended the London Focus Group.
In many ways, Research Council libraries are able to opt in to NESLi2 agreements in the same way as HEIs. However, as a result of budget cuts and the specialist interests of Research Councils, there have been non-renewals of some NESLi2 deals, with subscriptions to some individual titles. There is on the whole less interest in all-encompassing 'big deals' and the Research Councils would welcome more options to pick and mix, or select subject options. There is an interest in some commercial information databases.

RESCOLINC, the Research Councils' own closed consortium, does have agreements with for example AAAS and Nature Publishing Group, together with a subscription agent agreement. Jisc Collections carries out negotiations with publishers on RESCOLINC's behalf.
A particular concern for Research Council library staff, though also relevant to HEIs, is a restriction on authorised users affecting scientists visiting a site as part of a research collaboration, unable to gain access to certain e-resources. This appears to be an unfortunate restriction on collaboration in a world where most scientific research is carried out on a collaborative basis, national or international.

Appendix 4: Further Education colleges

Interviews were held with librarians at 2 FE colleges. There was no interest in NESLi2 deals, because of limited funds, the costs of NESLi2 resources and much of the content not being relevant for their needs, based on usage data. The total annual budget for resources for one college was just £105,000, to cover print and electronic resources, laptops and tablets, and subscriptions to, for example, their RFID library security system and library management system. This situation is common among many of the FE colleges.

Many colleges subscribe to databases such as I*nfotrac* and *Ebsco Business Premier* that give access to a wide range of general content at an affordable price. One college was

considering negotiating a discounted collective consortium purchase deal for Ebsco *Business Premier* for the 30 or so colleges in their region. The N. Ireland FE colleges also have a collective agreement with Ebsco for their Discovery System, across their 5 sites.

Many FE colleges provide HE courses for students, (one we spoke to having some 450 HE students). Colleges partner with local universities which validate students' degrees. There have been technical problems in some colleges with regard to authentication to enable remote access by students to resources subscribed to by the partner university, particularly where the partner is some distance away and therefore no possibility of walk in access. Apparently Shibboleth needs to be used and it is up to the university to enable access for students. There was a comment that sometimes a university claims there are publisher copyright restrictions and therefore no access.

The resources that FE colleges would like to see offered in NESLi2 would need basically to reflect the many subjects in the curriculum of each college, for example hairdressing, childcare, creative arts, engineering etc. Both colleges we spoke to participate in the Jisc Collections e-Books for FE project, and are very happy with this. Whilst access to e-books is needed, there is also interest also in journals for HE students, but limited budgets make it difficult to subscribe to NESLi2 e-journals deals.

Both colleges receive the jisc-collections-reps list, but not lis-nesli-reps list

Appendix 5: Subscription agents

Subscription agents generally recognise the strengths of NESLi2, as supporting the library community, and respected and trusted by that community. But there is a feeling that agents are increasingly left out of participation in NESLi2 agreements; that this is not what libraries want, and feel that JC should not be asking publishers to use the discount they provide to agents, to provide discounts to JC as part of a NESLi2 agreement. On the contrary, JC should be encouraging publishers to continue to provide the usual level of trade discount to agents. Most publishers are happy to work with agents, they feel.

There is a suggestion that JC is encouraging orders and invoicing via its system, not because of demand from libraries, but as part of strengthening its position as an intermediary under the new funding model. There was a suggestion that 'a more robust and efficient model' for the UK would be to continue with national negotiations, but to have two or three nationally approved agents (rather than the separate regional consortia as at present) available to libraries to handle NESLi2 deals and other journals business.

There was a roundtable discussion involving JC and the agents a few years ago that resulted in a document for JC to use with publishers that gave reasons why some libraries preferred to continue ordering via the agent. The agents are not sure that this document is still in use by JC. There are also reported communication shortfalls in JC providing timely information to agents on deals.

The recent pre-negotiation library consultations on Wiley and Taylor & Francis have revealed a preference for ordering via the agent, according to library comments to one agent (this is certainly true of the Wiley responses – 64% would prefer to pay via an agent, as against 21% preferring JC, and 15% preferring direct publisher payment – and is confirmation as suggested in the main text that there should be no JC single payment deals for the larger

publishers). The agents suggest that JC's annual Satisfaction Surveys also show that libraries still want agents involved with NESLi2. They note that consortia agreements generally include an additional discount if volume of business exceeds a certain amount.

Agents emphasise the new tools and services they are making available to the community, including discovery services that can link directly with KB+ for example, with automated updating of title lists, etc, and customised websites for libraries. They are also implementing or planning services to assist with APC administration.

Appendix 6: Regional purchasing consortia

Interviews were held with the Head of SUPC, and with the Chair of SUPC's Library Group. There was criticism of JC's lack of experience and expertise in procurement, suggesting that JC as an organisation does not understand procurement in general, and e-procurement in particular. As noted in the main report, there were also comments on the unavailability of strategic information on the JC website.

However, there was also an appreciation of the vital role of JC, and a feeling that trust between the consortia and JC was a little better in recent years. There was a plea for closer co-ordination and consultation between JC and the purchasing consortia, to see whether useful demarcation lines could be drawn between the activities of the different bodies, and to exchange experience and information. As formats merge and boundaries blur, co-ordination and communication become more important. Although meetings were essential at times, communication by email reporting on each other's activities would also be most helpful.

Subscription agents were thought to be an essential part of the system (although the view was expressed that they needed to step up their activities), and JC should engage with agents more. Negotiation with the big publishers should take place centrally, but delivery should be via the agents. There was a comment that institutions are wishing to ensure that their procurement is under EU tendering rules, and, because it is not possible to tender for an individual publisher deal, then actual purchasing should be via aggregators or agents. The concern is that JC does not take account of the whole financial picture, securing better deals for large publisher deals at the possible expense of lower discounts for libraries for the rest of their journals business, and permanent damage to the survival prospects of agents, an essential element of the acquisitions landscape. One of the agents expressed unhappiness at the extent of charges made to the agent for inclusion of their agreement in the regional purchasing consortia offerings.

Appendix 7: Trends and developments

Interviewees were asked if they envisaged any trends and future developments in both scholarly publishing and library provision of e-resources that could affect the operation and effectiveness of NESLi2 or any successor scheme, and if there were particular developments that you could identify.

Suggestions from librarians included:
- Open Access developments, including international
- Future of aggregator database market if OA becomes established

- MOOCs
- Licensing in terms of internationalisation
- More ICOLC information exchange with JC
- Article level purchasing.
- Backfiles – UKRR
- Trend towards access to book chapters
- Succession planning of JC staffing and risk of individual staff leaving
- New media (eg JoVE) from new publishers
- Impact of growth of student numbers
- Big Deals will continue. Publishers big deals will collapse
- Delivery to multiple devices.
- RCUK policy/HEFCE 2020 REF requirements game changers – built-in acknowledgement of OA, repositories green OA still very important
- Perpetual access.
- Political support for national consortium deals (whole of England).
- Government intervention in publishers' businesses
- University Presses to grow
- e-books
- e-textbooks
- Targetted resources for individuals (i.e. restrict access to a few researchers/students for lower price)
- International developments eg China
- FE colleges with HE students
- Changes in publishers' pricing models
- More granularity of content
- Trend to accept lower quality content ie everything via Google
- Library budget problems
- Data mining
- Use of technology, eg mobile
- New discovery methods
- Mix of all types of content
- Demand driven access to content

Publishers' suggestions included:
- OA mixed economy for some time
- Big data
- Big Deals will continue
- Big Deals will come under pressure
- More granularity of content
- Delivery of e-books
- Models for textbooks
- Pricing challenges and effect on revenue if journals collections grow
- Technology aspects
- Aiming more at individual user/researcher
- New business models
- Text mining
- How to price for 'new content' eg titles transferred or new journals
- Articles rather than journals

Appendix 8: International consortia

Sweden, BIBSAM

There are 79 institutions participating in at least one of the BIBSAM agreements. Members include universities, university colleges, government agencies and research institutes. There are around 40 agreements with publishers, covering approximately 100 e-resources. The agreements cover journals as well as databases, reference works, and e-books. There are also deals with a number of Swedish publishers.

The consortium's turnover in 2013 was 32 million euros, and the 10 largest Universities accounted for 73 % of turnover. BIBSAM has a Steering Committee, drawn from the library community, focusing on developing strategies and overall principles regarding negotiations, price models, and content.The opt-in model is used. Each library pays BIBSAM and BIBSAM then pays each publisher the total of each library's expenditure, as per the publisher agreements. BIBSAM is trying to move away from pricing based on historical print spend.

BIBSAM has 7 staff, based in the National Library. Each licensing manager is responsible for negotiations and agreements, with 10 publishers. The head of licensing is also involved in negotiations. Negotations start in Spring and the aim is for completion of agreements by October. A mailing list is used to inform all members of new offers and the results of negotiations. BIBSAM also has a half day meeting every October with any members who wish to attend and at which agreements etc are discussed. With new deals, trials are always offered to members. As regards the selection of resources for inclusion in BIBSAM, a survey invites members to put forward suggestions and these are assessed by staff, based on the extent of demand for each resource. The consortium has its own model licence based on the Jisc Collections model licence. Recent clauses added to their licence address Open Access, metadata, and industry standards.

Regarding Open Access APCs, BIBSAM has undertaken some negotiations with publishers, but it is low level and 'not a showstopper'. OA is growing but still very small, with low numbers of OA articles. Librarians are aware of OA developments, but researchers apparently little aware. It is too early to say how rapidly OA will grow in Sweden and the possible extent of BIBSAM involvement.

The consortium's website includes information for publishers; for example data on numbers of FTEs in all member institutions, procedures for publishers invoicing, and the names of all member institutions. There are no plans for providing access to content by SMEs or hospitals in Sweden, as the latter have their own separate consortium.

Ireland, IReL

No Review has been carried out recently by IReL. It is a closed consortium and receives top sliced funding from the relevant Government department to cover agreements for the 8 university member libraries. IReL makes a single payment to each publisher on behalf of members.

IReL is expanding, by way of a Pilot, which allows some additional Institutes of Technology libraries to participate in agreements, a key Institute of Technology being Dublin Institute of Technology, which is the largest of the Irish IoTs. The Irish Agricultural Institute also has access to some resources. All libraries get access to the same range of content. The

government is planning to move some of the IoTs to Universities of Technology status, but will mean mergers of some of these when this happens. For a very small number of Government Research organisations, IReL obtains some quotes from publishers for some e-resources, seeking better deal for these bodies than list prices they are currently paying. These libraries pay publishers directly themselves, and are not covered by the top sliced funding. IReL has also explored access to resources for hospitals but there have been difficulties with these and without success. There are no plans for any involvement with SMEs.

Jisc Collections has undertaken the negotiations for the core libraries in IReL. Where there are publisher agreements that have been in place for some time and IReL has contacts with staff at the publishers, IReL often now negotiates the renewals direct, rather than using Jisc Collections, providing savings on negotiation costs. There are now a smaller number of deals being negotiated by Jisc Collections - currently 10. IReL has been very happy with the results of JC negotiations.

IReL provides a weekly report to its Steering Group, which is made up of representatives of each of the 8 members, and seeks their views on publishers' offers, along with addressing negotiation issues and general status of offers. An offer is taken as agreed If no response from some members.

The final agreed Licence in negotiated deals (based on the JC Model Licence) is distributed to the Steering Group for comments. IReL often follows the changes made to the NESLi2 Licence. Access for retired academics is an issue IReL is currently addressing and also possible access for consultants at Cork University hospital. There is no activity relating to partnerships and the issue of access for extra students.

A page on the IReL website gives some basic information for publishers and also spells out the policy on how resources are selected. There is little communication otherwise with publishers apart from the negotiations.

Open access activity is minimal, but IReL states that it will grow and they have raised with some publishers the need for reductions on the costs of APCs. IReL did consider whether to participate in SCOAP3 but the Universities decided it was not worth pursuing and appeared to be complex.

Australia, CAUL

CAUL's last Review was in 2007. It is now looking back at that and reviewing what changes may now need to be made.

There is a focus now on the large and significant deals/publishers, considering how to 'cut-off' the smaller and less significant publishers and their deals. In this regard they are reviewing the pricing and discounts offered by smaller publishers and considering passing on the latter to other bodies such as subscription agents and vendors. CAUL is consulting with the consortium members and collating their responses.

CAUL's membership is 30 Australian universities and 8 NZ universities, plus some colleges, Government research centres, and Polytechnics, but do not include their equivalent of UK FEs (TAFES). There are around 90 to 100 publisher deals in place. The total amount spent on

electronic resources in 2012 across CAUL was AU$207 million, of a total of AU$268 million on all library resources.

CAUL is based on an opt-in model, although in small number of cases CAUL collects payment amounts from each library and pays a single sum to publishers. In all other cases publishers invoice each library. There is little enthusiasm for adopting a closed consortium model. The 'Group of 8' libraries in Australia (the equivalent to RLUK) did break away some time ago and handle their own negotiations, but discontinued it and the libraries reverted back to CAUL handling the negotiations.

Staffing at CAUL for handling all agreements is just 1.6 persons (the 0.6 being Diane Costello herself); hence the cutting back on agreements.

Eighty percent of all deals are with publishers outside Australia. CAUL acts as a representative for some smaller US and European publishers, for example the American Medical Association and Credo who have no offices in Australia. No charge is made to publishers but best terms are sought for CAUL for member libraries.

A particular focus now is on exploring better pricing models with publishers (Elsevier, IOP, AIP). In their discussions, CAUL is trying to move away from historical print spend and base pricing on a 'database' of content, with a single database per institution, and no individual subscription prices. The discussions look positive. Some aims in this exercise are:
- Annual price increase to be capped at CPI
- Current print spend model is not valid, so should not be a factor in price model
- Price model should be able to reflect changes in institutions and the environment over time – move with size (FTE) and nature (disciplines, research intensity).
- Model which reflects the product (type, discipline, level) and the subscribing university (size, weight, nature) constructed with parameters that are appropriate, readily available, transparent and valid

CAUL uses FTEs as the basis for many of the deals and is also exploring subject based collections. When ACS changed its pricing a few years ago to pricing based on size, all CAUL libraries were willing to move to this, even though some would pay considerably more. Usage based pricing is not liked – 'means need to ration access to resources'

Diane and her colleague handle all the negotiations. She reports to a Steering Group only if there are critical or difficult issues with negotiations, and if the major publishers are involved. CAUL has created a comprehensive 'Vendor Checklist' which is the equivalent to Jisc Collections' Negotiation Criteria. When agreements are finalised, all members receive an email with full details of the offer and how to order. Consultation with library directors is only occasional. CAUL asks publishers for pricing proposals by July, aiming for a final agreement by the end of August.

CAUL does not have a model licence, but uses publishers' licences. They have various clauses they seek to bring into publishers licences and apparently publishers are cooperative. There are a few 'deal-breakers' such as for remote access, opt-out clauses, indemnity, and ILL. Australian universities have had partnerships over years and also many additional sites. FTE numbers for all universities are entered into a Government HE database and these are published on CAUL's website. These are used to confirm all authorised users for each library where partnerships are involved. Most publishers are reasonable about the issue of access to resources by partner institutions and it is considerably less of a problem than it is in UK.

Open Access funding agencies do not mandate OA 9according to Diane), so there is not the same pressure as in UK. APCs are paid either by individuals, institutions or from research funding. Sometimes OA fees form part of a research grant, but academics are not keen to use this funding on OA. Anything to do with APCs is pushed to faculties at universities, not libraries. CAUL is not involved in Open Access and has not carried out any negotiations with publishers on APCs. There are no references to OA in Licences.

CAUL has a web page that provides information for publishers, including names of libraries, contact person details, IP addresses, FTE numbers for each institution, details of each publisher and the agreements each have. There is also information is also available to member libraries on the most recently agreed deals, past deals and links to licences.

There is no access to resources for hospitals and CAUL is not addressing access to content for SMEs. CAUL has no involvement with subscription agents and states that this up to libraries (and publishers) to decide whether they use them. CAUL's invoices are not sent to agents, but to libraries.

Cauls' views' on the future included:
OA will continue to develop. There will be an increase in Gold OA and publishers will seek to increase their revenues. Green OA will have less attention.
Academics are starting to create their own print and e-textbooks (OA or self publishing) and have less contact with publishers.

Further information on CAUL is at:
http://www.caul.edu.au/content/upload/files/meetings/vala2014vendors.pdf

Canada, CRKN

CRKN undertook a review in 2013, which was carried out by Liam Earney and Ivy Anderson of California Digital Library. The report (confidential) has been sent to us. Annual price increases were considered OK and CRKN did try to compare pricing with other consortia, but with difficulty.

CRKN use the opt-in model, although originally there were closed consortium deals with some federal funding, now no longer available. Opt-in is generally liked by members; it is stable in practice, and provides continuity.

CRKN makes a single payment to publishers and collects amounts from libraries. This works well for members, as they are invoiced in Canadian dollars, while CRKN pays publishers in US$/£/Euro. CRKN has been successful in getting favourable exchange rates, and also earns interest on payments made by members before paying publishers.

CRKN has 75 members. The agreement with Elsevier, for example, includes about 70 members. There are around 8 staff of which 3 are involved in the licensing. All libraries are in AUCC (UUK equivalent). There has been some consideration about extending membership to community colleges, but there was general resistance from members: lots of extra work, very little extra income. There are no agreements with publishers that allow access to content by other groups, such as public libraries, SMEs or hospitals, apart from university-affiliated hospitals.

Five or six member libraries work with the CRKN licensing staff in negotiations with publishers. For large publishers subcommittees are involved. The CRKN Board makes the final decision on acceptance or not of offers, and sometimes members are consulted if difficulties with negotiations (eg ACS), but the Board is the final arbiter. Negotiating criteria are set by the Content Strategy Committee, with region-based membership (4 regions, 2 members per region). Criteria are finally approved by the Board, addressing general criteria, plus price (varying by library), plus specific criteria such as KBART compliance. CRKN carries out a survey of members prior to negotiations, asking about experience relating to the current deal, and what additional content is suggested. A Task group is looking at guidelines for assessing new content for the website, including information for publishers, such as the process for proposing new agreements.

There are two separate listservs, one for library directors and one for collections staff. There is also a newsbrief several times a year, which publishers also receive. Communications with members has grown over last few years.

Their own Model licence is on their website. An alumni clause is being added and they recently added text/data mining, as well as addressing their OA policy ensuring authors can deposit in institution's repositories. A full review of the Licence is planned for 2015, which has not taken place for a few years.

OA is part of the discussion with publishers. Green OA is predominant in Canada, but APCs are increasingly important. The Canadian funding council is not yet mandating OA. Subscription agents not involved at all and most members cannot see what value agents can add. CRKN gets better exchange rates than agents, and also there would be a lower level of discount if agents were involved.

RKN is developing journal value analytics.

In considering future developments in scholarly publishing and libraries' access to e-resources that could have an impact on libraries and publishing, comments included:

An openness to change; OA; text/data mining; research data; interdisciplinary nature of research; need to support smaller Canadian publishers; publishers and library staff (both intermediaries) are unlikely to disappear in the near to mid term.

Finland, FinElib

FinElib recently undertook a strategic review, which can be seen at:

http://www.nationallibrary.fi/libraries/finelib/finelibconsortium/strategy20072015.html

This included adding more Finnish content and more e-books. The organisational structure has also changed, retaining its Steering Group but removing an intermediate Consortium Group, and replacing standing Subject Committees with ad hoc groups, along with making better use of expertise within libraries.

FinELib is an opt-in consortium. It negotiates offers, sends these to libraries, who decide whether to participate. For new resources there is a 'preliminary phase' of commitment, giving FinELib a good idea of which libraries will subscribe, the acceptable price and the money on the table. The final phase involves definite commitment. Cost-division for payments is used, based 40% on numbers (staff/students) and 60% on usage. FinELib collects amounts from each library, and makes single payments to publishers

There are around 400 member institutions, of which 300 are public libraries, so the most popular agreements are relevant to public libraries. The Elsevier agreement has about 40

participants. Membership includes all universities except two, about half the polytechnics and 17 research institutions.

There are 9 staff, of which 8 are involved in licensing. They handle the negotiations and make decisions, working with Licensing Principles at: (http://www.kansalliskirjasto.fi/attachments/5l4xoyz0b/5zqi7NqxB/Files/CurrentFile/FinELib _Licensing_Principles_2011.pdf). These are agreed by the Steering Group and occasionally they consult with members over particularly tricky negotiations. FinElib has recently started giving more information to members on how negotiations are progressing, whether there are delays, or if particular issues are at stake. Both libraries and publishers can suggest new resources, and an annual vote is taken on which should be pursued. There is a form for publishers to complete if they wish to suggest an offer for consideration. This can be seen at: http://www.nationallibrary.fi/libraries/finelib/forpublishers.html

It is sometimes difficult to get publishers to agree to terms in licences. Licensing clauses have recently taken account of outsourcing of library services, particularly by polytechnics. On the OA front, FinElib is trying to get agreement allowing researchers to deposit articles in repositories, hoping that they might be able to get agreement beyond e.g. Romeo standard conditions. FinElib has worked with SCOAP3 and SPARC. There is some Gold OA, but it is not co-ordinated within FinELib or Finnish universities, or within publishers.

There is no access to resources by commercial organisations or hospitals and no role at all for subscription agents, although there are agreements for some EBSCO databases, Finland being fairly e-only.

Germany: Bavaria and Alliance

Hildegard Schaeffler negotiates for two consortia: Bavaria and Alliance. Bavaria has a maximum of 40 members - 11 universities, 19 universities of applied sciences (polytechnics) and 10 regional libraries (Bayerische Staatsbibliothek + 9 much smaller ones)**.** Alliance is a national grouping, inspired/led by DFG and a maximum 200 members made up of HEIs and research institutions.

Bavaria has had an internal review and there was an evaluation of Alliance last year which led to rewriting funding programmes. There was an emphasis on certain aspects of their licence including text/datamining, a reduction in OA embargo periods, and perpetual access as well as hosting rights (for backup).

For both consortia opt-in has been the main model, although there has previously been some closed DFG licences with DFG paying bills. They have also tried to obtain central funds for Bavaria, but without success. A closed consortium might work in Bavaria, but not for Alliance (too many institutions).

With regard to Bavaria they avoid single payments to publishers, getting each library to pay their own contribution (via an agent, or direct to the publisher), because of the extra work involved, but did make a central payment to ACS, as an extra discount made this worthwhile. Some other German consortia do work on a single payment basis.

The Consortium staff handle negotiations and generally make decisions. They have on occasions involved librarians in negotiations but feel this has not made much difference to results. Bavaria does consult with librarians on negotiation criteria whilst Alliance is too large to do so. They have a Working Group that meets before concluding negotiations. A DFG Committee also evaluates offers for funding, and this is sometimes conditional on the extent of price increase. The consortia try to keep libraries informed during negotiations. There have been attempts to try to move away from historic print spend for some deals (Alliance),

but with difficulties, for example CUP, Karger, and De Gruyter setting caps that are no more than plus or minus 10% of the previous payment.

The Alliance license is based on the Jisc Model Licence, sometimes with changes by publishers. Bavaria's licence agreements have been developed over the years.

There is a concentration on Green OA, but have not always been successful at getting no embargo and sometimes they achieve reductions on APCs for full Gold OA titles, but do not negotiate on hybrid journals.

Access to content by other groups such as hospitals, FE colleges and SMEs is not provided, though some members of public can get remote access via both Alliance and Bavaria agreements (10,000 signed up throughout Germany.)

Websites are predominantly user-focussed, with little information directed at publishers.

The involvement of subscription agents varies across different consortia in Germany and generally it is up to each library. Some librarians value agents' holdings reconciliation, and detailed invoices. E-books are often ordered via agents, and sometimes with aggregators; for example there is a national e-book consortium with ebrary and a consortium e-book agreement with Springer.

Appendix 9. List of people interviewed

LIBRARIES

Name	Position	Institution	Band	Nation	NESLi2 deals max 15	SMP deals
Heather Whitehouse	Assistant Director	Aston University	6	England	12	2
Sue Hodges	Library Director	Bangor University	5	Wales	13 + 2 WHEEL	1
Tracey Randall	E-Resources Librarian	Bangor University	5	Wales	13 + 2 WHEEL	1
Mieko Yamaguchi	Head of Collections and Digital Development	Bangor University	5	Wales	13 + 2 WHEEL	1
Ann Siswell	Deputy Director	Bath Spa University	8	England	2	2
Mark Brown	Electronic Services Librarian	Birmingham City University	5	England	0	0
Ben White	Head of Intellectual Property	British Library	B	England	1	0
Sally Harper	Social Sciences Content Development Manager	British Library	B	England	1	0
Anne Jarvis	University Librarian	Cambridge University	1	England	12	4
Patricia Killiard	Head of Collection Development and Description	Cambridge University	1	England	12	4
Julie Neenan	Information Advisor, E-services	Cardiff Metropolitan University	7	Wales	4 + 2 WHEEL	0
Colette Capewell	Information Services Manager	Edge Hill University	6	England	11	0
Louise Cole	Senior Information Services Advisor	Kingston University London	5	England	9	0
Jeff Brown	Acting Director	Loughborough University	5	England	12	1
Wayne Connolly	University Librarian	Newcastle University	3	England	15	5
Jill Taylor-Roe	Deputy Librarian and Head of Planning and Resources	Newcastle University	3	England	15	5
Janet Smith	Systems Librarian	Newman University Birmingham	9	England	3	0
Mark Toole	Head of Libraries and Learning Resources	Nottingham Trent University	5	England	5	1
Helen Adey	Resource Acquisition and Supply Team Manager	Nottingham Trent University	5	England	5	1
Stuart Hunt	Head of Resource Development and Delivery	Oxford Brookes University	5	England	3	0
Jane Gosling	Head of Library and Digital Support	Plymouth University	5	England	9	0
Barbara Houston	Technical Services Manager	Queen Margaret University	9	Scotland	1 + 6 SHEDL	0
Elizabeth Traynor	Assistant Director, Library Services	Queens University Belfast	4	N Ireland	4	5
Irene Bittles	Head of Technical Services	Royal Holloway University of London	6	England	8	3
John Tuck	Director of Library Services	Royal Holloway University of London	6	England	8	3
Debbie Franks	Head of Library Service	Science & Technology Facilities Council	D	England	6	0

LIBRARIES

Name	Position	Institution	Band	Nation	NESLi2 deals max 15	SMP deals
Mark Hughes	Head of Collections	Swansea University	5	Wales	7 + 2 WHEEL	0
Paul Ayris	Director of Library Services	UCL	1	England	14	3
Karen Jeger	E-Resources Manager	UCL	1	England	14	3
Deb Findlay	Head of Library Services	University College Birmingham	9	England	0	0
Sarah Price	Assistant Director	University of Birmingham	2	England	11	4
Patricia Rogers	Acquisitions Librarian	University of Bristol	3	England	15	6
Richard Parsons	CIO, Director of LLC and University Librarian	University of Dundee	4	Scotland	3 + 6 SHEDL	0
Nick Lewis	Library Director	University of East Anglia	5	England	10	1
Liz Stevenson	E-Resources Manager	University of Edinburgh	2	Scotland	5 + 6 SHEDL	3
Clare Powne	Head of Library & Culture Services, Assistant Director of Academic Services	University of Exeter	4	England	9	2
Beverley Hughes	Library Resourcing Manager/Head of Serials	University of Exeter	4	England	9	2
Laura Roy	E-Resources Librarian	University of Glasgow	2	Scotland	8 + 6 SHEDL	3
Graham Stone	Information Resources Librarian	University of Huddersfield	5	England	9	3
Stella Butler	University Librarian & Keeper of the Brotherton Collection	University of Leeds	2	England	12	3
Steve Sharp	Resource Acquisition Team Leader	University of Leeds	2	England	12	3
Pam Stuart	Licence & Access Management Co-ordinator	University of Leeds	2	England	12	3
Phil Sykes	Library Director	University of Liverpool	3	England	15	8
Terry Bucknell	Head of Collections, Content & Discovery	University of Liverpool	3	England	15	8
Jonathan McAslan	Electronic Resources Manager	University of Oxford	1	England	12	2
Catriona Cannon	Assistant Director, Collections Support	University of Oxford	1	England	12	2
Ann Evans	Head of Collections and Resource Description	University of Oxford	1	England	12	2
Paul Johnson	Head of Collections and Space	University of Reading	5	England	7	0
Martin Lewis	Director of Library Services and University Librarian	University of Sheffield	3	England	14	1
Chris Ashton	Head of Content Procurement and Capacity	University of Sheffield	3	England	14	1
Jeremy Upton	Deputy Director	University of St Andrews	5	Scotland	8 + 6 SHEDL	3
Sonia Wilson	Serials and e-Resources Manager	University of Stirling	6	Scotland	1 + 6 SHEDL	0
Colin Sinclair	Library Content Manager	University of Stirling	6	Scotland	1 + 6 SHEDL	0

LIBRARIES

Name	*Position*	*Institution*	*Band*	*Nation*	*NESLi2 deals max 15*	*SMP deals*
Kitty Inglis	Library Director	University of Sussex	5	England	12	3
Greg Ince	Collections Librarian, E-Resources	University of the West of England	5	England	9	0
Liz Young	Library Resources Manager	University of Ulster	5	N Ireland	13	1
David Farley	University Librarian	University of Winchester	8	England	6	0
Sarah Thompson	Content Acquisitions Librarian & e-Resources Coordinator	University of York	4	England	13	0
Robin Cook	E-resources Co-ordinator	University of York	4	England	13	0
Paula Cahill	Serials and E-journals Co-ordinator	University of York	4	England	13	0

FE Colleges

David Scott	Head of Learning Centres and Financial Support	Kirklees College	E	England	0	
Colin Sawers	Team Leader Learning Resources	West Nottinghamshire College	G	England	0	

PUBLISHERS

Name	Position	Publisher
Susan Pastore	Director of International Sales and Market Development	American Chemical Society
Andrea Lopez	Sales Director	Annual Reviews
Bev Acreman	Vice President Springer Marketing & OA Business Development	Biomed Central
Steve Thorpe	Head of Academic and Corporate Subscription Sales (ROW)	BMJ Group
Linda Empringham	International Sales Director	Brill
Chris Bennett	Global Sales Director Academic Publishing	Cambridge University Press
Felix Haest	Regional Sales Manager, North Europe	Elsevier
Jason Roof	Account Manager, Key Accounts, UK.	Elsevier
Mike Cookson	General Manager	ICE Publishing
Helen Ellis	Regional Sales Manager	IOP Publishing
Steven Hall	Managing Director	IOP Publishing
Brett Rubinstein	Head of Business Development & Sales, EMEA	IOP Publishing
Bethan Creighton	Sales Manage, EMEA	Nature Publishing Group
Sergio Gonzalez	Assistant Sales Manager, EMEA	Nature Publishing Group
Sally Iannacci	Regional Sales Manager, UK	Oxford University Press
Ann Snoeyenbos	Manager, International Sales and Special Markets	Project Muse, Johns Hopkins University Press
Dan Dyer	Head of Sales International	Royal Society of Chemistry
Peter Lawson	International Sales Director	S. Karger Publishers Inc
James Pawley	Regional Manager - Library Sales, Western Europe, Southern Africa	Sage
Rone Robbetze	Vice President Library Sales Northern / Western Europe and Africa	Springer
Emma Lynden	Licensing Manager	Springer
Christoph Chesher	Group Sales Director, Books and Journals	Taylor & Francis Group
Mark Howard	Journals Sales Manager	Taylor & Francis Group
Ian Jones	Journals Sales Director (UK and EMEA)	Taylor & Francis Group
Uwe Stehle	Sales Manager Institutional Sales	Thieme Publishing Group
Anne O'Riordan	Senior Sales Manager, EMEA	Walter De Gruyter
Julian Wilson	Regional Sales Director, UK & Ireland	Wiley
Ben Townsend	EMEA Sales Director, Global Research	Wiley
Matthew Howells	Senior Account Manager, UK & Eire	Wiley

OTHERS

Name	Position	Subscription Agents
Paul Harwood	General Manager	Ebsco
Adam Gardner	Commercial Director	Swets

		Regional Purchasing Consortia
Susan Wright	Head of SUPC	Southern Universities Purchasing Consortium
Richard Wake	Southampton University Library. Chair, Library Group SUPC	Southern Universities Purchasing Consortium
Audrey McCulloch	Executive Director	Association of Learned & Professional Society Publishers
David Prosser	Executive Director	Research Libraries UK
Ann Rossiter	Executive Director	SCONUL

		International Consortia
Hildegard Schaeffler	Head of Serials, Licensing and Electronic Publishing	Bavaria and Alliance, Germany
Britt-Marie Wideberg	Licensing Manager	BIBSAM, Sweden
Diane Costello	Executive Officer	CAUL Australia
Clare Appavoo	Executive Director	CRKN, Canada
Arja Tuuliniemi	Head of Services, Licensing Unit	FinElib, Finland
Fiona McGoldrick	IRIS Manager	IReL, Ireland

Participants in Focus Group Meeting, Manchester, 4th March 2014

Name	Position	Institution
Ruth Hutchinson	Learning Resources Manager	Northern Regional College, Ballymena
Sheree Dewey	Serials Manager	University of Leicester
Sarah Taylor	Electronic Resources Librarian	University of Bolton

Regina Ferguson	Collections Manager	University of Salford
Elizabeth Gillespie	Subscriptions Manager	University of Liverpool
Neil Davies	Content Acquisition Manager	University of Durham
Jane Cooke	Digital Library Services Manager	Manchester Metropolitan University

Participants in Focus Group Meeting, London, 21st March 2014

Name	Position	Institution
Margaret March	Assistant Director, Academic Services	Anglia Ruskin University, Chelmsford
Lawrence Jones	Content & Digital Infrastructure Manager	St George's University of London
Laura Wilkinson	E-Resources Librarian	University of Sunderland
Joanne Dunham	Head of Collections & Information Systems	University of Leicester
Andrea Reid	Access & Procurement Manager	London School of Economics & Political Science
Carole Satchwell	Associate Director	University of Westminster
Kath Hudson	Associate Director, Collection Development & Special Collections	Cardiff University
Ellie Craig	Digital Content Librarian	University of Sussex
Joan Bird	Content Coordinator	NERC, BGS, Keyworth, Notts
Marc Cohen	Team Leader, Collections Development	Queen Mary University of London
Hannah Britcher	Team Leader, Procurement & Metadata	University of Portsmouth
Liz Allsop	Librarian	Rothamsted Research, Harpenden
Anna Franca	Subscriptions & Access Manager	King's College London
Ken Hollywood	Manager, NERC Library Services	NERC, BGS, Keyworth, Notts
June Thoburn	Business Support Manager	Northumbria University
Ann Aldridge	Serials Librarian	Goldsmiths University of London