

## UKSG webinar – Ebook Consortia Purchasing Models, 29 January 2014

**Speakers:** Carolyn Alderson, Acting Head of Licensing, Jisc Collections and UKSG Education Officer and Hazel Woodward, Director, Information Power Ltd.

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Should you have a question arising from the webinar and not answered below, please e-mail Carolyn or Hazel who will be happy to respond.

### Questions arising from the Q&A session and the registration/feedback forms:

**Q1: How "disruptive" does the panel believe some of the newer "B2B / B2C" e-textbook models (as represented by e.g. CourseSmart or Kortext) may prove to be? And does "The Library" risk being partially or possibly entirely bypassed?**

A: Hazel. eTextbooks are difficult. Contracts are often made at institutional level and libraries are not consulted.

Carolyn: Jisc Collections has not made progress in this area on behalf of libraries in the UK despite many projects and efforts in the past, the most recent being in early 2013. Dealing with big players like Pearson is not easy. Their business model is to sell directly to students and maintain their print sales. Coventry University has made some progress.

**Q2: How is it best for individual libraries to access consortia ebook purchases - individual library links or one link for all in the shared catalogue record?**

A: Hazel: Individual links to individual books is the best way to get them used. MARC records have to be provided.

Carolyn: At no additional cost!

**Q3: How is it best to distribute cost among consortium members?**

A: Hazel: This is a really difficult question that is frequently debated at ICOLC (International Coalition of Library Consortia) meetings. Different consortia take different approaches. As I pointed out earlier, CBUC (Spanish consortia) could not agree the funding split when they undertook a similar project to the Jisc Ebook Pilot. The really important thing is to discuss in advance and ensure all participants understand and agree to the split.

Carolyn: In the first year it might be that FTE is used or some other available measure and the consortium agrees to go with that for a year – and then re-evaluate after a year, perhaps using usage as a measure. All members need to acknowledge there is some risk involved in the first year.

**Q4: What are Consortia purchasing requirements?**

A: Carolyn: It is important that a consortium plans collectively before contacting publishers. The final slide of the presentation outlines aspects participants need to think about. These are the building blocks.

Hazel: When Jisc Collections undertook the engineering ebook project, all libraries agreed that – when forming a consortium the important thing is to understand the synergies between the participating libraries. As far as Health Libraries are concerned, either you can get a third party to put together a group of health libraries or they form themselves. Change their title perhaps to incorporate ebooks?!



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### **Q5: Can you recommend a company that is sympathetic to health organisations purchasing consortia?**

A: We can't discuss individual vendors here, but please contact Jisc Collections for further information.

### **A related question asked: Are you looking at shared services models? Potential collaboration through shared services.**

A: We understand this to mean Third Party bodies managing the consortia deal. Certainly if individual libraries want to know if there are other libraries like them wanting particular content and have a preference for a purchasing model, Jisc Collections may be able to help harness the interest.

### **Q6: What about Licensing issues for individual libraries within the consortia purchase model?**

A: Carolyn: Are the libraries in a formal consortium operating as a legal entity? Legal entity – designated person signs as a consortium and members named. This is an area Jisc Collections can help with by creating the legal consortium framework. Jisc Collections licenses with the publisher and then sub-licenses to the institutions.

### **Q7: How best to evaluate consortial ebook PDA deals?**

A: Hazel discussed usage evaluation in her presentation and Carolyn has included a slide with some details about EBA analysis.

### **Q8: Who is better eBooks provider/vendor?**

A: Depends on what level of ebooks you want. This takes us back to the consensus of the consortium. Quite often a consortium purchasing may work by harnessing all those libraries that prefer access via the same aggregator, or who might want to purchase eBooks in a particular subject.

### **Q9: How does remote proxy access for each library work with these shared purchases?**

Answer to follow.

### **Q10: What is the difference between PDA and usage-driven e-book purchases?**

A: Covered already, we think, when discussing EBASS and the models involved.

EBA using COUNTER usage to make decision. PDA is purely patron driven involving a purchase after a significant event.

### **Q11: E-book consortia discounts. The role of aggregators, and when do universities purchase from multiple aggregators.**

A: Discounts have to be negotiated with individual publishers and aggregators and negotiations can be very time consuming. Always factor this into your planning.

### **Q12: For the Knowledge Unlatched pilot, you have to pay a fee every year. But what happen if you don't want to pay anymore?**

A: There is no obligation to make any payments after the pilot.



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**Q13: How many books were in the JISC engineering study?**

A: Each publisher offered a portfolio of their ebooks. With the big publishers this was several thousand books. The smaller publishers typically 50 – 100.

**Q14: With knowledge unlatched, we were told that you could claim back the cost of any print or ebooks which you have also bought. How does that work?**

A: Indicate on the online form which books you will buy and the 'Unlatching Fee' will be deducted from your KU bill. To be eligible for this you are asked to place the order through your usual channels by the end of March. It's an honour system.

**Q15: Is a large library likely to be seen as an asset in a consortia or would the partners be anxious that the larger institution would over use the books and get better value from the deal?**

A: Much depends on how the consortium decides to contribute to the agreement. A library with many users may not be funded as well as another with a lesser number of users but with a bigger budget. If at the end of the day, the whole consortium and every member get a better deal than they would have done individually, then there will have been value for everyone. If a multiplier is used to purchase access for all the consortium members, and if the largest library is likely to dominate in terms of purchasing titles collectively, then this may need to be considered in how the additional multiplier element is allocated across the consortium members.

**Q16: What are the terms and conditions with publisher and libraries for international consortia?**

A: This would all be up for negotiation with the publisher concerned and in relation to the libraries who want to be involved. The libraries comprising the international consortium would need plan and agree its own objectives first and consider viability and risk aspects.

**Q17: Is there any consortium working on international level for acquisition of ebooks?**

A: Jisc Collections is always interested to discuss such possibilities and engage with consortia on such projects.

**Q18: Are there any case studies for ebook consortia where members are from several European countries?**

A: We are not aware of an active library-driven European ebook purchasing consortium. Jisc Collections is always interested to discuss such possibilities. The Knowledge Exchange group (<http://www.knowledge-exchange.info/Default.aspx?ID=68>) is active in this area.

**Q19: How do we manage new editions and removing content that is out of date?**

A: Depending on what is agreed with a publisher new editions may or may not be included in the terms of the agreement. Hence it might be that the consortium would need to consider these aspects as part of the planning process, particularly if they are purchasing content collectively. Depending on how content is accessed, and if the access is at institutional level, the issue of removing content that is out of date may be decided at a local level.



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**Q20: How are libraries chosen to be involved in projects or pilots? Are libraries approached individually or volunteers asked for via mailing lists?**

A: It depends on the nature of the pilot but often it is a number of institutions that have initiated a need for the pilot in the first place. The EBASS25 pilot was generated by the M25 group of libraries and then they sought funding.

**Q21: How do we go about setting up a consortium ourselves?**

A: If you aren't part of an established consortium then Jisc Collections would be pleased to discuss how to get organised. The final slide of the presentation provides details of the items a consortium needs to consider.

