

UKSG Introduction to E-Resources online seminar 2024 - day 2

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Thanks Vicky. Thanks for the for the introduction and good morning everyone. I hope you're all

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doing very well on this Thursday morning and it's sunny here again in the Lake Districts, which is a three days on the trot, which is a miraculous. Thanks for all everyone for coming back for this second day of this introduction to E Resources online seminar. As Vicky mentioned, we're really keen to get interaction with yourselves, so I will be monitoring the chat throughout the morning. And also if there's any people who feel brave enough to

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speak out and sort of add comments in any point, then that would be very, very much welcome. And on day one, we

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had presentations reflecting on more of the library focus. So Ruth Smalley provided a presentation on managing your resources and then Anthony from University of York provided

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a very in depth

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presentation on buying and managing ebooks,

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which really is all set the presidents for for for today. And so

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like if you move on to the next slide or today's agenda,

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there we go. So day two is more focused on

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publisher and product services or intermediaries. And so the start of the day, we're going to set off with an ebook round table. So we'll be inviting Ruth Morley and Anthony back into that discussion and we'll have a short break

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and then unfortunately get to hear from me again. And so I'll be providing the presentation on the role of intermediaries and how their products and services have changed to reflect the nature of libraries, our services that are being offered as well. And then we'll go into a presentation from official

who works for Elsevier and he will be providing an overview of the publisher perspective and how they support libraries and intermediaries themselves as well. Really. So and then we'll finish up

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hopefully around about 12:15 with an overview and final summing up. So as I mentioned, any comments, any questions you have, please put those into the chat box. We'll be keeping an eye on that throughout the morning and we'll make a start. So

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just as a reminder to recap, we sent out some homework at the end of day one and it was aimed to help you reflect on the presentations that have been delivered that morning. And we sent out a paddle at Link. And I think Vicky is going to be putting that paddle at Link back into the chat so that it can review. So I'm going to kick things off really by sort of

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providing a bit of an overview of the responses for to that panel up to that homework question that we set. And then we'll use that as a launchpad into the panel session this morning.

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So I think your next slide.

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So first of all, we want to thank you for

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too far. There we go. There we go. I'm not controlling the slides. It's we're working as a team here today. So

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as I mentioned, we want to thank you for engagement with this exercise and your contributions. And on reviewing the Padlet, there's been a great number of comments and they're real valuable comments in there. I think it's probably fair to say that the comments that have been put into a puddle at a reflection in most people's minds at the moment when it's referring to ebooks. And so yes, there's been lots of interesting comments highlighting a range of complexities and issues associated with managing and providing access to ebooks. So we'll

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in terms of pricing and licencing, there's comments on sustainability, affordability and current pricing models and issues with pricing transparency. Content availability was something that came up from digital rights management

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in terms of accessibility and in the first session we touched a couple of times in accessibility and the importance of this to the libraries and the paddle. It shows that meeting accessibility standards and the user experience of accessing ebooks is also a priority for you, making sure your books are compatible with different systems and are compliant to the latest standards.

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Then there was comments on discovery and metadata and with the number of comments and making ebooks discoverable and the workflows and process of making purchase content available.

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And then in reference to usage analytics and the changes there, there's always challenges around usage for Open Access materials and engagement. And the theme engagement, clearly an important topic.

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Their comments on how users can feel connected to the digital library like they used to with the physical library. And I agree with this and feel it can be a lot more challenging in the digital space and to show the importance and impact of the library

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when the users may not be aware that the library actually is the one that's actually providing that service.

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So we don't have time to go through every single comment that's on the paddler, but I would encourage you to go back and reference that link, which Vicky has now shared in the chat and use that to when you're reflecting on the content over the last two days. The aim was to get you thinking about some of the challenges that you face, your own institutions of different sizes and different structures, as well as the wider industry trends and ahead of that. So hopefully everyone found that useful.

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Um,

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so that's going to lead us into the panel discussion. So I'm going to invite

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Anthony Sinner to step forward again, switch on his camera and his microphone.

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Clara is going to be joining us as well and hopefully Ruth has

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resolve some of her technical issues, but we shouldn't come here. She can hear things. Can you hear me? Oh, fantastic. That's great.

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So thanks again for joining us this morning. It's great to have you back. Hopefully you both found that the first days sessions quite engaging as well, really anti. I know you've had a review of the Padlet as well. And I think Vicky mentioned that you sort of shared resources, that it was a bit of a look into your own mind of some of the, the concerns and challenges that have posed there, whether ebooks. So

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as I mentioned at the start, we welcome questions to this panel. Anything that's on your mind, any thoughts that jump out at you that you want to share with a wider group or ask Anthony and Ruth and Clara or myself, then please do so. But so whilst we're waiting for questions, I'm going to, I'm going to kick things off if, if that's OK

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from the paddle that we can see that

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some of the responses on the in relation to pricing and licencing and that being a big concern for libraries, which is unsurprising. What role do you think Open Access books and open education resources can take in addressing some of these challenges?

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Don't make started during the you wanna you start

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Yeah, and I think I would say that Ohh yeah, um,

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have all the potential in the world, but it seems like a difficult path to get there. And so

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the, the number one thing that that we could achieve through our house and, and probably the most valuable thing is to extricate ourselves from unsustainable and harmful deals that that,

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that kind of pile on pricing year on year are kind of compound on attractive models. The idea of being in control of, of the resources of, of having kind of self created self updated resources that aren't content by the university through either a University Press or through, through kind of some kind of partnered platform. It's tremendously attractive and it's something that's been explored in a lot of different ways.

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Houses that it seems to be there are something that is kind of quite far distant in terms of a viable solution because for a start, we'd have to work out a way to create the resources. So that would require academic buying.

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And I think a lot of the a lot of the initial work and a lot of the research that's taking place across the sector has concluded that really the only way to do that is to kind of completely read all the sector. So that the creation of open educational resources is as academically rewarding and financially rewarding is as high quality research. Without that, you don't really have a route into

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getting resources and therefore there's nothing that would that would kind of be the product as it

were. And there's tremendous potential in things like open stacks and other open educational resource platforms, but they're all kind of very early. So it's something that is at an early stage, but it's really the primary route through which you could imagine getting out of the fix that

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in some of these issues that have been highlighted on the platform.

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Ruth has anything?

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Yeah, no, I completely agree with everything Anthony say. I think they look like the magic bullet, but there's so many things in the way and some of the things we need to build at the moment are the infrastructure. I think Anthony alluded to it there, but there's not the infrastructure at the moment. So, you know, we know if you've got a book on EBSCO, we know that when that link, it's going to go to that book. And I think the underlying infrastructure for the open education resources is not as reliable and not as fully developed. And that's somewhere that I think

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countries really need to look at in

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focusing their funds. If we're going to make a switch and move towards the Open Access and open education resources, we need to invest in that infrastructure so that it has got that same reliability. And there's still a huge issue with

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academic trust of open books, Open Access books. So we've seen a huge sea change with articles and things that now because of the way REF is, because of the way that funding and everything is that academics now expect to publish their articles Open Access or a large number of them do. And it's a relative relatively pain free and straightforward process in most cases, certainly with the major publishers. Whereas books because of their nature, because their longer term things, because they take longer to

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developed, because they

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it, you know, take the bigger, obviously they're just much bigger and, and much more complicated.

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There's not that same expectation. Academics are still just one to get published with their books. They don't really engaged or many of them aren't so engaged with the whole process of open books and open education resources. And I think that's a huge structural thing. That's for us as librarians, but for the sector as a whole, for the researchers, for the vice president, for all those kinds of people to engage with to make it in that same way. There's been huge debate in the well, it's been a bit of a spark of a debate in the press recently with some Oxford academics have come out and said that

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REF should do away with the Open Access criteria for books

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and the UKRI funding model has now changed. So if you're funded for your book X, your, your final output of your research is a book that has to be published Open Access. But there's all sorts of problems in that, in that it's all chapters. Sometimes it's not a complete book. If you've got a chapter book that's

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a, a group of academics getting together to write a sort of a how to do this subject guide, it can often just be a chapter. And that's causing huge admin and logistical problems in getting those to be Open Access. And obviously then there's the whole side that generally speaking, a lot of humanities research isn't funded. So there's no driver at all for them to be, to be publishing books Open Access. And part of the side effects of the big transitional arrangements is that humanity is published.

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Academics have been able to publish their academic research articles Open Access, even if they're not funded. And that's fulfilled the REF as well. But if they start to mandate for REF, sorry, if you're outside of the UK, I'm talking about the REF, the Research Excellence Framework, which is a government mandated way of measuring the quality of university outputs. It measures the quality of the research and it covers books and articles. And this time there's talk about them making it mandatory that any book

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chapters or books that are published as part of that and

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are gonna be have to be published Open Access. Which is a huge problem if you're not funded because publishing a book costs a lot of money. Which is also another part of the problem is that publishing an article is,

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you know, even if you look at the worst of the, of the APC that people charge you to publish an article and you can argue that it doesn't cost that much. Publishing an article is much cheaper than publishing a book. And across the board, that's, that's part of the issue. And moving that,

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that whole responsibility and cost and risk of publishing a book from publishers to something Open Access, from a paid for products at the end to an Open Access products, I think is hugely challenging.

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And we need to be, you know, we need to be hugely creative, but we need to build that trust with the academics too, and not force them down a path that that becomes massively biotic at bureaucratic and puts them off actually publishing at all. And that's kind of our worst case scenario really.

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So do you think that Open Access material is viewed differently then by academics or

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I think his books it is. How do you work with those academics to

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Yeah, to help them identify content that can support library and library budgets? Because that's I guess that's part of this is, is other options or so expensive that away content is a

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way of meeting budgetary demands.

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Yeah, I mean, there's a few platforms out there. Ohh, see, sorry, I've had such a terrible more than I'm not prepared and stuff. So I've not sorted out. But there's a few different sort of libraries and repositories of books that have come along there. Someone just mentioned open book publishers, but there's a I've probably got it bookmarked if I can find it. There's another reposit alpha template in the chat in a minute, but that that aggregates them and is starting to look at getting academics to rate those Open Access and open educational resources so that people can build kind of confidence that they've been reviewed

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and other academic to give them confidence in using them. So we're trying to promote that out to people to give them some chances. I think just in terms of the history of volume, you know, if you look at the amount of printed material and books out there, it's going to take us a long time to move to a point where even the textbooks that that's replicated. So what we're trying to do at the moment is we're trying to ask academics

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where they have engaged with us at all to try and maybe add one or two and giving them the links and the, the, the tools to find those books. You know, you've got open, Open Access books as a directory of Open Access books, the same as the, the directory of Open Access journals where you can go and find these things. And I think I can't remember this. I will find this site and I'll put it in the chat of this one where they're looking to get them reviewed, which can kind of say helps to build that confidence that you get is something that is relevant and is respectable and isn't just something somebody random's put on the Internet.

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Which I think is where some of the academics view it at the moment. That it's not being reviewed and everything in the normal way. Even though many open educational resources, if they've gone through university presses, if they've gone through open book publishing and things like that, they have been academically

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checked and reviewed to make sure that they are relevant. So it's just kind of trying to give them the confidence that they're not going to give their students something that's,

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you know, giving the wrong information. And I think that's one of the tough things. So

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yeah, I think, I think that that comment resonates because I've, I've Bill Murphy's in the chatters mentioned that while we are an Open Access ebooks have great potential. Aren't they vulnerable to some of the predatory practises that are becoming apparent in some academic journals?

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And I think certainly from a aggregators point of view. So the company I work for, we were an ebook aggregator and we've got responsibility there and then editorial team to help curate that content and help identify which content is

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peer reviewed, is credible, supported with that kind of metadata to make it discoverable. So certainly we

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provide a no way collection and a no progress do something similar via fire disc agreements as well really. So there's

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there are platforms and services out there that can help institutions

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weighed through the

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the vast amounts of content were there.

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And so did you have a view on that Klara?

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Ohh. It's just gonna you. Sorry. No, no, it's fine. You you answering me? Thanks.

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I was just going to say absolutely vulnerable to predatory practises and all, all resources that are managed through third party would be, would be vulnerable to predatory practise, which is which is why safeguards need to need to be built into various stages in the process.

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I think that's part of what would make this whole thing.

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It's an instantly viable solution because they need to be, they need to be built over time. And and like we said, there needs to incorporate as part of that building participation in the peer review process,

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confidence academically and all of those those different things. So this, this, this all all of this goes towards why it's not a quick solution, even though it might ultimately one day end up being the right solution.

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John Harrell added into the comments while saying not doing health. Sorry. John McGowan added into the chat about saying he's found OBP Open Book Publishers Cambridge very helpful resource as well. So that's in the chat for people to

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however yours and the same breaths put in the chat there as well. The Lib guide from Adelaide University with lots of information about finding goers as well, really.

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And I mentioned John Harrell's name there because he's put in there. Is there a place for institutional repositories in this chain for managing orders as well as that's something that any of you are institutions that you've looked at

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kind of solution.

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And I I wouldn't just say that there's a place for institutional repositories in the chain related to. Oh yeah, there's definitely a place for institutional repositories in the in in the chain. And they're absolutely essential to

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create and access situations at times of

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extreme budget challenge,

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institutional repositories that are kind of key to the growing trend of.

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Of policies that, that are coming out of, of universities for, for things like

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ownership battles and kind of preprint repository storage and all of the various different things that are happening at the moment about kind of

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repositories of, of, of work for, for it to be kind of an, either an initial record or to, to kind of get

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push back against commercial embargos. So that there is

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having a, a chain of institutional repositories that, where, where there's a culture among researchers of, of using them as their first stop. It is a tremendously beneficial scenario and should be encouraged.

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Yeah, good point.

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It's a simple question that came through on the paddler and it has been posed on previous pallets. As before, apologies for asking this question again, but

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is an E textbook different from just a digital edition of a textbook? And why it's so expensive.

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Don't know who wants to answer that again with you. Do you wanna go first? Well, I'm happy for you to go first on that. I'm sure we both got lots to say, right? OK, here we go.

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So the answer to both is kind of is quite simple, but what infinitely complex at the same time and any textbook is what a publisher says is any textbook there. There is no systematic definition that goes beyond that because things aren't defined as the textbooks have become a textbooks and things that

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were previously textbooks have been encouraged, changed definitionally in catalogues hundreds of times over the over the past five, five years. And you kind of could stretch that back as long as there's been any textbooks. So really the question should be what should any textbook be? Because the only, the only thing that drives etextbook definitely at the moment is profit.

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Etextbooks shouldn't have to be pinned to a a kind of physical representation of what the physical textbook was

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historically. We have tremendous scale of potential for imagining completely different resources out of out of the textbooks and in a whole kind of father of ways that that aren't pinned to kind of historical definitions of of a kind of summary guide that is divided up thematically by chapters. It could go anywhere because with the levels of technology that are available to publishers.

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And the reason, the reason that it hasn't is because they've been penned into kind of

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10, the PDF or, or, or more recently, kind of slightly more accessible

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versions of, of the, kind of capturing what was on the page in a, in a digital format and then

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gradually eking out a little bit more functionality where, where it's kind of profitable to do so without risking

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the, the kind of opening up access to it to a wider kind of audience. And, and the, the, the digital ecosystems that the walled garden ecosystems that they all exist in is, is entirely an invention of, of the publishers who made them. So at the moment, we're in a position sector, kind of sector white where

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and we have basically just a kind of digital reimaging of what's exactly what's on the page and in a textbook. And there's very few examples of where it's gone further than that price wise,

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that the price is determined by

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internal calculations of of profitability. It's often seems to the outside observers in libraries as

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arbitrary and copious and and open to change. And it frequently is changed and and the the wide variety of licences are available. Is is kind of different on different publisher platforms and different aggregator platforms. So there isn't even any kind of internal consistency within the system. It is by every measurable definition a broken market. It has no elasticity.

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Price and demand are not related in any meaningful way to the to the end user. And therefore there isn't really a kind of framework through which predictive pricing can be, uh, exists in any meaningful way. So we're kind of

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we are

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ultimately bound by whatever the pricing publisher says set on that day as a aggregators as well, which is why pricing models are difficult to fix. And obviously this has a kind of impact on assessing

profitability and assessing viability of particular titles. But all we can say for certain regarding most ebook prices is that over time they tend to become

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if If an ebook is very popular and very well used, they tend to become more restrictive and higher priced.

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That's bad. That's right on the subject. Yeah. No, you got anything extra to answer that we have, yeah, completely agree with all the pregnancy said. What what we've said. I think it's this whole, the definition of what an E textbook is, is is incredibly difficult. And one of the things we've identified particularly this year, I've done some research on it because we're reviewing our etextbook provision at the moment and it's it's the individually textbooks themselves are not particularly going up in price. What we're finding though is that more and more

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books are being sucked into the system. And so the cost to us then obviously is going up and up and up because books that last year we could buy on a standard library model, as Anthony said, now we've got to buy on this one to one, one copy per student model and it's costing. I mean, I don't like naming and shaming on this one particular, but we also want Wiley did a few years ago when they withdrew a load of books that were in a package and we're going to try and sell them back to us as a one to one model, which actually didn't happen at the time. And they pulled back and all their comms are going out going this is great. We've pulled back from this. We're letting

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we have access, but what we're finding now is that every new edition of any of those books that previously were available in a package that a large number of libraries subscribed to,

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it's a very kind of reasonable cost sort of package for a lot of books and a lot of access. We're now having to pay almost as much as the full package that we used to get to get. I think it was 20 bucks and we were paying actually I think more for those twenty books and we were paying for a package of something like 200,000 books or something. It's a huge package. So, you know, those books are getting sucked out of that and we're having to pay more for them each year. And that's one of the really big problems. And we've no way of knowing. There's no way of looking at a book and going

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next year, that one's going to become an etextbook and we're gonna have to pay for it in a different way. It's completely arbitrary and at the whim of it. And books that you're kind of looking at and going, well, that shouldn't be a, you know, to me as a librarian, that's not a textbook.

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And yet we're getting charged for it at that. And we're having to find out how many cohort numbers are in that group and how many licences we want to pay for. And it just means that as a library budget, and I'm sure we're not alone here at Edge Hill, we kind of actually bucked the trend for a long time. We've got budget cuts next year having to do more with less. Well, we're having to, you know, find all these books that suddenly moved to this really expensive model.

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And sorry, I've wandered off the topic, I think a little bit here, but I can't remember what was the, the, the point of the question again in the end.

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And, and it's just, yeah, there's just no, no predictability to it. And I think that's one of the really, really hard things that we find is just, you know, every year you go to your renewals and you just kind of like, I've got a list that my, my reading list librarians had to each year with the books that they can't find this year. And every year it gets longer and longer that I've then got to try and find as as E textbooks.

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But it's it's just like essentially says it's a completely broken market. We we're seeing, as Anthony had said, very little that's actually adding value. In fact, some of them are really no better than just a PDF

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scan of the actual textbook, which is useless. And it's huge accessibility issues because textbooks are not meant to be read, you know, line by line down. They've got, they've got boxes of extra information, they've got diagrams, they've got, you know, little pop outs and little extra bits of information. They're not meant to be read as a book that you read from the first page, go through chapter by chapter, paragraph by paragraph. They're very different things. So in terms of accessibility, when it's just basically a PDF of the the printed text, it's horrendous for accessibility.

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We're seeing that even with relatively new ones, ones that we think have been published recently and we would expect better of what we're not. We're not seeing that extra value that we're then having to pay for that we would expect. And what we do find is some of the publishers are,

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OHH, then adding on courseware to go with it that that will provide you with

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questions and, and things about it. And then they're packaging the whole thing in with the textbook. But they're not made the textbook interactive. They've just added load of questions and quizzes and stuff on top and some way for a teacher to market and track it. And it's not really making that textbook an Open Access resource. It's not really making it into an interactive resource. It's just kind of tagged something else on that. They're then charging us

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double trouble whatever for

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and say, I think if we saw this significant breakthrough of like, wow, this is offering so much more to our students. It's really enhancing their experience.

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Maybe we are prepared to pay a bit more for it.

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We're not seeing that. We're just seeing the same as the print

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scanned in PDF accessibility out the window,

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no matter what the best, you know, especially when you got an aggregator like EBSCO, like Bubbly, like Cortex or anything like that or, or adding on to those. They're doing their best with the accessibility, but they can only do with what they're provided with by the publisher. And, and, and it's just, yeah, it's, it's so frustrating. I think you can probably sense from both Anthony and myself the frustration that we feel with this that every year we're trying to work with

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have been sort of several references to to the ebook market as a, as a sort of broken system. Do you, do you have any sense of anything that could sort of help to fix this? Or is it, is there any power with, with librarians to do that? Or does it sit elsewhere?

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I mean, again, it's, it's, it's a long term, very, very involved question. Um, that, that kind of has the simplicity baked into it because the, the, there are simple answers,

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this tremendous amount of power that, that, you know, cities institutions have, which is the money and the, the finances that the publishers required to kind of generate the vast profits. And I think it was something like the UK academic market was customs like £4 billion last year. So the money that we have could be used in better ways, but the problem is that libraries and universities as a whole have kind of been successfully

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separated by publisher activity. So really what tends to end up happening is libraries have an internal fights within the university to to kind of get concessions around. Well, we might we might not use this book or might not need this book

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and that those kind of internal struggles don't tend to involve the publishers at all. So this is part of what what one of the biggest problems of the broken market and why there why there is no elasticity is because

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publishers very very rarely see the consequences of the terrible decisions that they make. They're not presented with them. Librarians spend enormous was part of the reason why cars are so much anger within the sector is library and spend an awful lot of time apologising for the terrible decisions of the stupid systems created by publishers. That source and nor student with

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who requires the use of a screen reader is going to go a widely to complain about the textbook that will come to the library to complain about the lack of accessibility with the textbook and our response should be in a function marketplace. We will not buy that until you fix it, but we have a tremendous amount of problem kind of convincing

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internally with our institutions, academics who sat and spent an enormous amount of time and effort setting up a course around a particular text to then kind of withdraw that. So what we ought to be doing, and This is why open educational resources offer a kind of a much better reality if we were able to kind of build around them. Because owning

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the the the kind of product would then

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provide us with the ability to be able to kind of

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change things meaningfully. While while we're while we're kind of buying on behalf of somebody else for something else that they'll never kind of hear any of the negative feedback what they don't really have. And we've been historically bad as the sector out driving the type of collective changes that would be needed to harm the revenues of the publishers, which is ultimately the only, the only real way in which they would actually change something. So there, there are potential ways to change

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this, this sexual riding group activity that could lead to that. And and there's, there's engagement on a kind of government level through sector bodies like our UK and DISC. And that that have in the past has shaken some things, loosened and caused publishers and providers to step back on certain decisions. But we need to be a lot more organised and a lot better at the type of activism that would that would lead to change.

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Yeah, thank you. Please. Do you have anything to add to that? I was just gonna say, yeah, everything Anthony said about the the being in the sector, you know, it is so hard because the tutor wants that book at that point. And that makes it incredibly hard for us to move money. And ultimately that's what we need to do is to move the money because the money is what talks at the end of the day sways people. But

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we've, we've been doing a process and we've been looking at it to try and, you know, support some of these open publishing,

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both the systematic level and an individual publisher level. So we've supported some of the Open Access university presses to become Open Access and we're trying to move some of our spend. And we've, we've looked at it and I think, you know, it's in the nought point of the percentages that we're spending on this at the moment and we're trying to move some. But when those costs are going up and you've got staff and students standing in front of you going, I need this book and I need it now or else these students are going to suffer.

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It's really hard to say. Well, no, we've moved it to these Open Access books that you're gonna see the fruit of in 10 years time. It doesn't really wash as an as an argument. So it's really difficult for us as a

sector. And it's saying things like the ebook SOS. We're really successful at getting academics to work together, getting librarians to work together. We went to the government with the the, the asking for a review and of the market and and just completely deaf ears completely turned away, got nowhere. Now, whether you know, if the government does change

36:21

on the 4th of July, whether that will change, but I doubt we're going to be top of their agenda. So, you know, it's, it's really difficult. So we, even with the weight of everything that was behind ebook SOS and the amazing work that the coordinators of that did, it's still really hard to get it taken seriously as a, as a problem. And,

36:41

and yeah, it it, it's frustrating to sort of sit there and go, ohh, there's nothing we can do. But there must be something we can do. We just need to find it.

36:52

Wish I had an answer. I don't have an answer.

36:57

No thanks. That feedback

37:00

I'm I'm afraid we've run out of time. That's that half an hour's gone so fast at there's there's a lot of other sort of questions that

37:09

the poles as part of that paddle that we unfortunately not been able to get to. But

37:16

I want to thank you both for for your time again today and for

37:22

providing your presentations on the first day of summer. It's always very insightful to get your view on your experiences at your own institutions, but certainly sharing themes that are I think are very prevalent across the whole sector, whatever size library you work with. So

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Anthony, Ruth, thank you very much again for your time and we'll leave you to the rest of your day. But we're now at that point where we're going into a break and

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so that we are due to reconvene at

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5:00 to 11:00. So we've got 15 minute breaks. So if everyone's back here that

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1055, that would be great. Thank you very much.

38:03

Thanks everyone. Thank you, everybody. Thank you. Thank you.

38:37

Morning. Welcome back everyone. I hope you had a chance to just grab a drink and do what you need to do in the break. So I'm very pleased now to be introducing Richard as our next speaker and Richard is going to present on intermediaries, give us an intermediary perspective. So over to you, Richard.

38:59

Thank you very much. And let me just

39:03

screen share.

39:09

They'd be an expert at this by now.

39:26

OK. Can you confirm you can see my screen?

39:30

I can, yeah.

39:35

OK, perfect. OK. So, um,

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thank you Claire for that. So you already know who I am, but just just as a reminder, I'm Richard Bramwell. I'm one of the regional managers here at EBSCO Information Systems and I've worked with,

39:52

I've worked at school now for about 16 years working with academic, corporate, government, health libraries of all different sizes and shapes. And so this is quite a few sort of trends.

40:05

As, as, as organisations like EBSCO and other intermediaries have had to evolve. Following on from some of the feedback and, and the points that were sort of raised in previous presentations on day one

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to, to, to meet the needs of libraries today.

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The topics that I'm looking to cover off in this is provide introduction to what our intermediaries, some of today's challenges and how intermediaries had to become more consultative to move away from being product or service delivery to a more consultative approach to work with institutions on how their workflows work to drive efficiencies, budgetary challenges, all those kind of things.

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Then I'm going to touch a little bit on content curation and some of the practise and the best practise that goes into

41:00

deciding what content is going to go into specific databases or ebook collections and how we deliver that to the marketplace. And then finally, finish off with some of the new technologies that we've had to develop across the board to support the services that libraries are delivering to their end users as well. So the perspective I'm looking to deliver on this is one of generality across intermediaries. There may be a couple of times when I reference specifically to services

41:30

app score offering, but the idea of this presentation is to sort of share knowledge about organisations like EPSCO and other organisations.

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So just to set the scene, you may or may not be familiar about EBSCO Information Services. So we are a family owned organisation working with over 100,000 institutions. We're a leading provider of research databases,

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E journals, magazines, subscriptions, ebooks, discovery services and SAS solutions. And we've been doing this now for over 80 years. This year it's actually our 80th birthday. So we've been around for quite a while and we partner with libraries to improve research with quality content and technology services.

42:21

So I'm going to start sort of explaining a little bit about what the traditional intermediaries, so when obviously EPSCO came into being, what kind of need we were delivering services for.

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So in terms of a definition of what an intermediary is, so it's a go between.

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So someone who carries a message between people or tries to help them reach an agreement. So we're we're, we're part of that business process, that conversation between libraries and publishers to help support delivery of services, products, commercial agreements, etc.

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Why do we need intermediaries? Well, the, the world of publishing is extremely complex with many

libraries and many publishers servicing many library users and many authors. So put it into context. As an individual library, you would have relationships with

43:16

a multitude of publishers, large and small, all with different systems for ordering, accessing content, invoicing, managing that content, different commercial agreements in place, multiple invoices, all that kind of thing. The process of managing relationships with individual institutions to deal with each of those publishers on its own would be a huge resource intensive process.

43:44

So why do we need intermediaries? As I mentioned before, intermediaries act as that go between liaising with many publishers on the library's behalf. So we provide that access point into all those publishers and vice versa publishers into individual libraries and we offer a suite of services and customer services and products that help enhance that process and make it as efficient and

44:08

smooth as possible.

44:12

And some of the traditional subscription management services that we offer. So things like electronic order processing, reliable payment, making sure that payment is done on time, there's not multiple invoices going off across to different libraries, different publishers and making avoiding that kind of complication. As I mentioned, dependable renewals, we offer customer services around there. So forth issues go missing or there's access issues and then we can manage that process on behalf. And also

44:42

that content has been purchased is offering an enhanced discovery to it. So making sure that content that you purchase or publisher is providing is as discoverable as possible within your infrastructure.

44:59

So there's two major intermediary models that are traditional. So there's the own and the lease via aggregators, own via agents at least via aggregators, both have

45:11

positives and negatives. So in terms of the old model, this offers customers items on A1 at a time basis. So some of the base benefits that are associated with that is the selection is much larger. You've got a bigger pool of content to pick and choose from, which is very different from the potential lease model, which is restricted in terms of the content that's provided,

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purchase offered perpetual access for customers. So you own that content outright. And I guess the major drawback for that is

45:41

this kind of acquisition model can be very expensive. So to buy all the titles potentially that you would want to to service your academics and your users would be extremely expensive.

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So the second model that's offered is a lease and it offers customers a large fixed subscription collection.

46:00

And one of the drawbacks being of that is selection is limited to popular items often negotiated for those publishers. So organisations like EPSCO would go to a publisher to publisher to licence specific content and that's all on the wing of the publisher, whether that content can be loaded into those specific resources or collections.

46:22

Um,

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with another drawback being that the collection is not owned. It's usually done on a subscription basis sort of 12 month. And so that content at the end of that subscription is not owned by the library,

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but the benefit being that the collection greatly expands the breadth of content, but a relatively low content point. Some of the resources that we offer,

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the total collection value if you bought individual items could exceed over £1,000,000 and what we're offering that resource at a a fraction of that price that contract. So, so it's a very good sort of cost of ownership model.

47:00

The insert the original intermediaries as mentioned. So these were the subscription agents and they offered administrative services for publishers and libraries where they would consolidate orders, invoicing payments and consolidating those invoices into single currencies where normally with the publisher you may be again building U.S. dollars or whatever that local currency may be EUR. So that helps sort of manage that process as well.

47:28

And traditionally those subscription agents work on a on a business model where publishers would offer discounts for their services and then we would apply handling charges to those institutions. In the past subscription agents started to deliver their services. They were of course heavily print focused. But over time as they were all seeing that there's been a a move to more electronic focus, but there still is a market for that print related services as well.

48:01

Then we have content aggregators, some database aggregators is one type of that content aggregator. So they offer specialist on multidisciplinary resources. These can be offered on a multi year or annual subscription and they can contain abstracts and indexes, journals, reports, books, conferences, papers, conference speeches, videos, training guides, all that kind of thing. So as a slide says there

48:27

they are more subject specific and they will be delivered through a single platform. So it's taking

content from multiple publishers, multiple sources, multiple types and bringing it into a single collection.

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And again, that's sort of simplifying that purchasing world rather than having to go out to those individual publishers to negotiate access to that content. We've managed that process for you and they are subject focused. There are multiple disciplinary databases out there, but they also offer that enhanced need for specialist interfaces with advanced searching. So for example, if there's a

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nursing courses that you're teaching out and as a focus on systematic searching or mass searching, then we can develop the platforms to enhance that search functionality.

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And then of course there's book aggregators and they offer online ordering systems. So essentially searching multiple aggregators and publishers in a single interfaces that services are focused around both print and ebooks. And as part of that service, they would support within enhanced mark records or metadata to make sure that that content is discoverable as possible.

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As Anthony mentioned in his presentation and and in the discussion this morning, there's a

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lots of flexibility in terms of purchasing models that are available out there and delivered by those of content aggregators, which are sort of decided by the publishing publishers of that content. So we have credit models, perpetual access, Dbas and Ebas and subscription collections as well.

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And the other area where book aggregators can help support libraries in terms of supporting compliance with National Book agreements. So again, Anthony and and Ruth alluded to framework agreements like the UPC or more local consortial agreements and organisations that are book aggregators would respond to those tenders and ensure that we are meeting their service deliveries, the commercial agreements, everything in place. And one of the

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parts of book aggregators is to ensure integration with library management systems for ordering and invoicing,

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just to help sort of extreme to, to, to support that workflow efficiencies and, and, and deliver a better service as possible.

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So who are the intermediaries? So in terms of subscription agents, there's probably all organisations that are familiar to yourself. So EPSCO, Premax, harasser bits, and then you've probably got regional agents. Obviously, if you're joining this webinar from outside of the UK database aggregators ourselves, let's go focus, Clarivate, Gale, Ovid with names that will be familiar with yourselves. And

then in terms of book aggregators, these ones that we've touched on again today and we've done since presentations, there's ourselves

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request Clarivate, Browns, Cortex, W and and and many more. And when you look at for example, the UPC contract, there's many more sort of smaller

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aggregators of, of content as well.

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So as we've discussed over the first three sort of sessions of, of the of this webinar, that there has been

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a huge shift and huge change within the sector for for libraries, which is also reflected with intermediaries as well. So there is a drive to change to to ensure that we're delivering a sustainable business model and recognising new opportunities that are out there.

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There's been a move to a service charge where publishers traditionally has offered discounts

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and this is

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driven out sort of smaller profitability for organisations that offer intermediary services as well. So there's there's

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there's been a need to move away from handling charge for move towards a handling charge for that as well as well documented. There's a global economic fluctuation which which certainly provides challenges intermediaries like ourselves, for example, where we're building U.S. dollars by the publisher and then have to invoice

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in local currency to our customer base as well. And obviously there's a cost of living crisis. A lot of the

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inflationary increases that are

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decided by the publishers don't sort of meet the expectations of

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local libraries in terms of their budgetary requirements, so we've had to work with those organisations to try and influence those as well.

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We're seeing more and more that many publishers are now looking to deal directly with institutions, and the last session we talked about publishers removing content from collections and looking to sell that directly and cutting out intermediaries, which doesn't always work to the benefit of the library, where the libraries need that intermediary service to handle and deliver those services that I've already mentioned about invoicing and things like that. That's something that's quite important. So

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we're looking to work more closely with publishers to show value to the services that we're offering, not only to the libraries, but to those publishers as well and manage that process.

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And then finally, we're sort of seeing a gradual decline in the market size.

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Some of this is, is, as we discussed in the last session, is, is, is an impact of the uncertainty over what Open Access is gonna look like in the future. But also certainly considering the impact of

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artificial intelligence and what that's going to mean to not just libraries but organisations like ourselves in terms of the services that we offer. So there's a lot of change going on.

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So as I mentioned, intermediaries have had to evolve. So we've had to move away from that product

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item delivery, individual journals, ebooks, etcetera, but look to enhance that portfolio services that we offer to validate our position in the workflow of libraries, publishers and intermediaries. So some of the things that we move to work towards now is looking at things like print or electronic analysis. We do benchmarking against all help organisations to help develop their collections further .3 that talks about

55:06

election development.

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So we offer and I'll come on to this a little bit later in my presentation. We offer services around understanding what your collection is and understanding overlap, trying to remove duplication of content and understand usage and establish the value of that collection as you move forward. And obviously certainly that's

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core part of that is developing value service to drive efficiencies things that are sort of out of the the standard intermediary services. And we're kind of seeing now a a huge focus on analytics as you probably are seeing in your own individual libraries as well. So there's a management level not just within the library, but from the university level there's there's a lot of questions asked of libraries about their impact

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return on investment value services. So there's a need for intermediaries to help support the collection and analysis and delivery of that kind of content and data to support those strategic decisions moving forward.

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Just take a little SIP because my voice is a little bit croaky.

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So I thought it would be useful just to talk about

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database strategy. And this, this, this relates to Episcopal I think is prevalent across the sector in terms of how aggregators decide what content goes into that. We talk this morning at length about

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making sure that content is

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is important, is peer reviewed, is credible, has been selected to go to to go into these resources and it's it's an important factor. So I think it's

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it's important to and relevant to sort of spend a few minutes just talking about the the the curation of databases and and the structure that goes into that. So

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essentially we have editors and creators that ensure the quality of that kind of content so that lots of libraries don't need to. If your individual library had to decide what content and rely on academics or work with academics to pick that content, of course that's a valuable part of this process. But being able to rely on organisations outside to have these editorial teams to pull together these resources using various different sources and means, which I'll come on to, is something that's very important.

57:37

The first part of this is to licence active full text for journals receiving high usage in reputable subjects indexes.

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So hopefully on the screen here you will see a number of indexes that are utilised by academics for educational purposes, but they are authoritative indexes within their specific subject fields here. So you've got Agricole, you've got economists, you've got Medline, CINAHL, Psych info for psychology information. These are all

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key indexes and what companies like EPSCO will do is work with these index providers to try and licence as much content as full text contents within those to put into their resources. So immediately you're seeing that it's important peer reviewed content.

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Equally important is, is to ensure that we're not licencing any content that is blatantly low quality journals that corrupts research. OK. So we want to make sure that the content in there is not only relevant to its current, but it's coming from reputable sources as well.

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So this is a, an interesting piece of work that was carried out by Stanford where they

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conducted research to assess where their

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students were understanding where content was coming from.

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And this, this slide deck will be shared with you. But it's, it's, it's a, it's a, it's a good piece of work to refer to. But they're, the researchers were shocked by how many students failed to effectively evaluate the credibility of that information. So they were just taking that content and seeing it as being correct and peer reviewed. They weren't sort of

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doing any additional work to evaluate that content

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of the things that were referenced. So this is Jeffrey Beale. He's a librarian at the University of Colorado in Denver. He's created The Beatles list. So this is a a list of or like a watchdog list of predatory publishers and pseudoscience. So ensuring that content that's

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provided on these kind of lists is not entering into our curated databases, something that's critically important as well.

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The third part of this would be licencing access active full texture, as many of the top ranked journals as possible with no embargo were feasible. So trying to provide content that's available and current as possible at all. Just before about some of the authoritative indexes that are in places as well, but our focus is to create content that comes from some of the leading journal ranking studies.

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Things here that you may be familiar with is like the JCR Journal Citation Reports, the SGA Reports and Eigenvector, but also looking at leading journals or

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content providers within like the business sector and making sure that we're licencing content that's ranked by them as well really. So again, adding that extra reassurance that the content and there is credible and important

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and with such an Open Access, but all including Open Access journals as a value add or price is not affected by the inclusion of these publications. So including key curated Open Access content, whether that's a journal or an ebook into these database resources, obviously making sure that doesn't impact the cost of the resources. So Ebsco's policy on this is, as I mentioned, is to create an index Open Access journals and provide accurate links to that full text. That whole creation process that we've talked about is really important.

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So we have our subject bibliographers who identify that important content and include it in index into those into these resources. The key part being is that for free or paid content is brought in and is searchable alongside Open Access content in the same place really. So it's just giving that a

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simplified access process

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and moving on to new intermediaries,

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some of the associated services that we have evolved into. So one of the key parts there is intermediaries work with all

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types of libraries where they're different in size, vertical markets or corporate government, academic health libraries,

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um, to support the technologies that they've already invested in.

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So the key part here is being that we need to be able to integrate with the systems seamlessly that may be using APIs to make those workflows as seamless as possible. So giving libraries choice over best of breed services that they may want to or integrating with existing infrastructure that we have in place.

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One of the things that Obscure do is talking about sort of moving away from being that product

1:02:54

delivery service and and into more of a consultative approaches that through user research and meetings with senior library directors at geographical Advisory Board. So we have advisory boards throughout the world, as do other organisations world where we engage with

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important and seeing your directors within those markets to understand what requirements that they

have in place and what strategies they're looking for. And hopefully you'll see on here some of the things that resonate with your own individual libraries as well. So,

1:03:27

um,

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partnerships, innovation, student outcomes being something that was critically important that came out of this kind of research. They were looking at open technology systems. And one of the key things there is like usage value and impacts, but recognising staff and time efficiencies because of that. So using this data, intermediaries have needed to evolve from product and service providers to trusted consultants and partners. And that's why we're trying to position ourselves now moving forward.

1:03:59

As already mentioned in previous presentations, over the last two days there's greater demand on budgets than ever.

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Quite often shrinking budgets in in most cases where Larry Bazar asked to show value and drive cost savings where possible

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by strategy is often stated commitment to enhancing collections and removing barriers to content for students.

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Furthermore, there is a desire for to improve sorry workflows by the adoption of new technologies and present analytical data to support decision making.

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This is all aimed at improving the end user experience and satisfaction, which in turn helps establish and demonstrate the value of the library.

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The greater the sorry, the greater the impact, the ability to justify future budgets long term and plan for the future. And this is just an evolving cycle. So you keep moving through this process and maximising budgets allows you to get bigger, better collections, to invest in technologies to support the libraries and enhance that end user experience, which then again moves back to validating that library position and just find those budgets. It's a Ferris wheel keeps going and going.

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So based on this feedback, intermediaries look to develop solutions and services in these three areas, all with the aim to maximise budgets. So those three areas, areas being technology collection, development and user experience,

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these are some of the technology areas that we're focused on and hopefully will resonate with yourselves and areas of importance to importance of you to to you as well.

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Discovery tools help to surface valuable content providing linking technologies into your seamless access to full text. Supporting your libraries

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authentication methodology of choice such as Shibboleth Easy Proxy, IP, username and password Openathens whichever technology you use. Ensuring any products and services that are developed integrate effortlessly with other library services via robust APIs and offering technologies that help recognise workflows and efficiencies for library staff. And just as important, being open offering libraries choice to adopt the best in breed technologies.

1:06:22

Equally important is recognising the need of libraries to develop, enhance their collections and also identify cost savings where possible. Intermediates develop services and products to support you in your efforts. So looking at things like reducing, eliminating duplication, improving those workflows and tools that support that collection analysis, analytics is a really key part of that.

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There's an unprecedented demand on libraries to produce analytics to support many of these areas of collection

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development and automate data collection and unification and present the data in a simple process.

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So this kind of moves into the analytics piece that I alluded to at the start. So we did a survey of 196 academic libraries on library analytics

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and the the results of this were quite eye opening, but maybe a reflection of your own individual libraries as well. So over half of those respondents noted that a lack of time

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61%, lack of expertise 54%, and lack of

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personnel or resource. What to do with the top buyers to data analysis? It's so complex to bring data in from different silos, different,

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um, providers, platforms unify that data, manipulate it into a single interface. That whole process is,

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was, is, is a big challenge to many libraries

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and this, this, this graphic kind of represents some of the work that goes into there. So, um,

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and offers a timeline as sort of the the workflow that of of

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effort and that comes into from the library. So

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collating county stats, taking information from, from your ILS or LMS, circulation, budgetary expenditure, authentication, access room booking systems, staffing levels, bringing that all in that essentially what that means is a lot of time spent on harvesting the data, which is the green sector there, manipulating the data, which is the purple section there. But the actual time to analyse

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and report that,

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um, on that data is very small. So very often requests can come in for

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management information on specific things, but the amount of time it takes to gather that data means that there's not as much time to actually do the analysis and report. So organisations like ourselves have looked to develop services to book that trend, to streamline the focus on. So streamline the efforts to bring that data into that system and ensure it's in A

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and A and a status that is then easily analysed. And the majority of the time can then be spent on reporting

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one of these services that we offer. And this is a little bit of a name drop, as is Panorama. So it's a self-service platform for data discovery.

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It offers default platforms, but also

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visual dashboards and, and the key thing is that it automates the data, the collection of data, whether that's via council and Sushi with the which are things that Ruth alluded to in her presentation as well.

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That automation of and harvesting of that data into the platform is, is, is a key part of this service delivery.

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Organisations like ourselves will then host that data in a data lake and those individual customised or default dashboards can then be pulled and alive to help support collection, development, library decisions moving forward.

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So that I'm not going to go through all of these, but there's a number of platforms here, sorry, some interfaces that sort of represent some of the information that can be driven out of here. So this is a library overview. So it's showing high level metrics on usage of loans, expenditure

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requests, offering that kind of holistic view of the library to top level, which can then be shared with library management teams as well.

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Then we have things like collection budgets, overviews, circulation statistics and physical items. And one of the key areas that we're looking to move into now is

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developing platforms that will support the analysis of read and publish deals or publish and read deals side by side. O publishers will offer interfaces themselves that will allow you to

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evaluate an individual read and publish deal. But how do you

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evaluate an RMP deal from Wiley against Taylor and Francis side-by-side? So offering services that do that, do that comparison, offer that ability to investigate the value for money, the usage against those kind of services is really important.

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And then finally in terms of technologies, user experience and library perception. So some of these factors will resonate with you. When considering the user experience

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into regions, look to develop solutions and services to support them. So things like ease of use, reliable linking are all key components of this as well. Search and relevancy. As discussed in previous presentation, the needs of interfaces to be modern, intuitive and accessible is a paramount. So we're pushing to make sure our interfaces meet the latest accessibility standards. So the WCAG standards and providing VPAT certificates to libraries to show and support their

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compliance in meeting accessibility needs is something that's become key part. So

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engage with your intermediaries, talk to mass them if they've got statements and documentation that

you can then host within your library services as well to show compliance and meeting the needs of those accessible students who will require those additional services as well.

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A key part of this is eliminating single point of failure. So when your students interact with your systems, they're not being met by broken links to resources. So offering strong technologies like link resolvers is a key part of ensuring search queries get

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through to full text with confidences as a key part of that. But also simplifying that process, Making sure that

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the user interface interface is intuitive, that's easy to use, that there's not too many button presses to get to that results, that that what the user is required. But making sure that they're staying within that library environment.

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Other technologies that we're looking to develop or have developed is helping libraries meet their users wherever they start their search. So

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there's a lot of different theories out there about discovery layers and how relevant they are today when students are interacting with libraries from various different points. So they could be accessing content from the discovery layer from the VLE, they could be going to Google, Google Scholar and bringing them back into the library to access the content that you're paying for and offering those kind of services that we've,

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we've talked about workloads Ruth talked about in her presentation. So like the lean library and those browser plugins to recognise Doris and bring them back into the library to access the contents and validating the libraries as important part. The ultimate goal really is users who have a positive experience will also have an enhanced perception of the library and keep returning.

1:14:25

So that point that was kind of raised in the round table about validating the digital library is users don't always recognise or appreciate that libraries offering a service, but if we can bring them back in and interact them with them wherever they start their journey, is as a key part of this.

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I'm not going to spend much time on this because this is a whole, whole

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new topic that I've been attending many

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conferences recently and it's high on the agenda and I think it will continue to be. But intermediaries is have a responsibility to consider a future with artificial intelligence.

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And certainly from the perspective of EBSCO, yes, this is something that we are evaluating and we are embracing and we're bringing functionality through to our platforms and our databases and our services.

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But the key part of this is ensuring that

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we don't lose quality in terms of the the services that we're offering. So we're providing credible research resource resources and we're making sure that that end user experiences

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still as positive as it has ever been. And we're not diluting that process that we're ensuring that publisher integrity is still in place. But equally we're being transparent. So we're challenging users to and telling them where AI has been brought into our service as well. So this is something that I'm sure in future

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presentations in, in this, this webinar will become more of a factor. And I'm sure

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by the UKSG Education committee will probably be developing webinars specifically on this this area, but it's a definitely a hot topic.

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So in summing up, how can we help?

1:16:21

I think really the point I'm I'm looking to make is that there's been a shift from intermediaries from being that product delivery service to solution partners and consultative partners. So helping to

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understand what your overarching needs and goals are and providing services on specific collection, analysis and understanding potential technical, technological opportunities moving forward

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whilst recognising a greater need for workflow efficiencies.

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All with the aim of UM,

1:16:57

users getting a better experience with your libraries themselves.

1:17:02

So the main point is you're, you're, you're working with intermediaries and they have changed, but you are working with them and they're offering a lot of these services that I've

1:17:10

kind of provided a very brief overview of. So ask questions of them and talk with them in a consultative manner and as a partnership and see if there's synergy and service and products that can be utilised moving forward.

1:17:29

And that's me.

1:17:34

Thanks Richard. Wow, that was really, there's a lot of information there. So thank you. That was really useful. And you've got a few questions and comments in the chat. So we we've not got loads of time. So perhaps for some of them you'll need to come back and provide an answer in the chat if that's OK. But I think,

1:17:54

yeah, we've probably got time just to cover one or two. So you've been asked what work is EBSCO undertaking to offer more diverse resources, resources originating in the global S for instance, is this area a priority for the aggregator sector?

1:18:14

Yeah, certainly from an app scope perspective, we have a strong focus on licencing contents from local markets, but global markets as well really. So I think there's potentially in the past being a view that APSCO has been as a US organisation that some of that content is leaning towards that market. But

1:18:37

with many of the database resources that we offer now, we can show through data where publishers are coming from local, local areas, providing that local content into those resources in local languages as well. So we're we're keen to big focus now from EBSCO is globalisation of content.

1:19:02

OK, brilliant. Thank you. And and we've been asked about Open Access articles in EBSCO databases. So wondering sort of what processes you have to sort of assure of the quality of Open Access resources in EBSCO databases. Are you reviewing or evaluating the content?

1:19:25

Yeah, absolutely. I mean we've we've already sort of in these sessions like alluded to some of the content providers and some of the lists that are available. So the DOJ and things like that are all indexes that we refer to and look to licence content from.

1:19:42

We've got a very strong editorial team that's curate the content and we treat Open Access contents in the same way that we would as paid content. So they go through that same rigorous processes as is alluded to in the database strategy of making sure it's maybe it's content that's indexed on authoritative.

1:20:03

High or it's it's been ranked in a specific journal study, We would then evaluate that individual editorial because we provide strong metadata and subject headings associated to that when we index it's into our resources. So you would receive exactly the same process. It's treated exactly the same as any other kind of content that we would ingest into any of our resources.

1:20:28

OK, brilliant. Thank you. Well, thanks again for your presentation. And just a reminder to everyone that you'll be able to see that again on the recording. So there was lots of information there to take in, but you can revisit that. And so if I can direct you, Richard, just to the chat for the last couple of comments and questions. And then I think we're just going to take an extra, just just a 5 minute break here before our next presentation. So it's slightly odd timing. I make it 11:37,

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so can we have 5 minutes and be back at 11:42 by my watch? OK, see you in five. Thank you.

1:21:16

OK, welcome back everyone and thanks for that. So Visual was due to join us, but unfortunately is unwell, but his colleague Michaela has offered to step in at the last minute, which is amazing. Thank you so much, Michaela. So I'm now going to hand over to Michaela to talk about understanding the nuances of publishing and an introduction to elsewhere resources supporting development of library professionals. Thanks.

1:21:42

Yeah.

1:21:44

Thanks a lot Clara.

1:21:46

So Oh well. Thank you so much everyone for joining the this session on understanding the nuances of publishing and introduction to Elsevier.

1:21:56

So let me just so my name is Michaela Closet Cam. I'm a customer consultant at Elsevier for about more than 20 years, I believe, and I have been covering the UK and Ireland for 12 years before I am. I have been I started covering Germany since 2024, so since January this year. I also have been a member of the UK G events and education team for more than 12 years. So the industry is

1:22:26

really known to me, let's say.

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OK, so

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the agenda,

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so the purpose of this presentation is to give you an insight into the world of publishing and using Elder Fear as an example here. So today we are going to talk about the origin of scientific publishing and some current scenarios, the role of a publisher in this case elsewhere, and how we support librarians and research. A bit about Open Access publishing. There's no way around it, of course. And which is

1:23:08

resources? We have a late available for librarian development.

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So let's take a step back and let us understand the the origin of journal publishing. In 1665, the first scientific journal called the Philosophical Transaction of the Royal Society was published,

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making a significant milestone in the dissemination of scientific knowledge.

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Initiated by Henry Oldenburg, the Secretary of the Royal Society, this journal was a private venture directed by Council Minutes from the 1st March of 1664, which mandated monthly publications contingent on the availability of content. So today it continues to thrive as Part A and Part B.

1:24:02

The philosophical transaction of their own society established foundational principles for scientists, scientific journals. So it focused on the registration and the archiving, which emphasised the accurate recording of the inventor's identity and timing, ensuring that the credit for discoveries was preserved for future generations. And this is actually also at the same time the role of a scientific publisher

1:24:32

also, we give it time stamp, it's quality check, and we preserve it for future generations in easy words. So this journal was also committed to broad dissemination and collaging scholars to share their knowledge and discoveries and instituted an early form of the whole How we now appear review by having submission revised by members of the Societies Council, now setting a standard for scholarly communication.

1:25:06

Next slide, please. Vicky. Sorry. Yeah, I, I, I, I forgot to say this. We're on the right slide.

1:25:12

So scientific like publishing nowadays. So today's researchers are faced with ever growing volumes of information they need to search. Yeah, they need to evaluate and incorporate into their work. So this is nothing new for us. I believe so. Most important resources for researcher is quality articles published in quality high impact journals. If it needs to be published there.

1:25:42

It's what we all understand that if we read quality, we publish quality. So, reading quality journals help us in having access to quality research articles which further enhances our research acumen.

1:26:00

Next slide please.

1:26:03

And then you have to click through a couple of times until the end.

1:26:07

Yeah.

1:26:09

When what? Perfect. Thank you. So for research there are two important keywords here, information and knowledge. So in fact, they are both part of a series as you can see on your screen. So as mentioned, researchers today are faced with ever growing volumes of information they need to search, evaluate and incorporate into their work. So the recent years with the advent of big data and data science, research has

1:26:39

become more powerful and data-driven.

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Yet it is becoming increasingly difficult to find impactful content to read and the most relevant journals to publish. So remember, it's not always about metrics, but more about finding the right audience who in the end will read the content and will also cite the content if relevant.

1:27:05

Next slide, please, Vicky.

1:27:11

So in fact, we believe that building knowledge should be seamless and irrespective of the source of it. Today's researchers have brought multidisciplinary workflows to connect the dots and to see the big picture. They need access to reliable

1:27:28

interdisciplinary research using a wide range of content types. So not just journals. So the boundaries between books and reference and journals, they are fading. So our book publishing strategies, Elderfield Books publishing strategies is focused on alignment with journals to make sure that the content gaps are filled and foundational knowledge is provided where needed.

1:27:57

Next slide, please.

1:28:03

So let's move to Albufeira, a quick introduction of who we are. So also FEAR is a global leader in information and analytics. So growing from our roots and publishing, we have supported the work of our research and health partners for more than 140 years.

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Also appears headquartered in Amsterdam and we have more than 8700 employees.

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So although yes indeed involved from a traditional journal and book publisher into a global information analytics business. So this transformations, this transformation reflects the broader shift in the publishing industry towards data and analytics. The employment of over 1900 technologists globally by Albufeira supports this strategy shift

1:28:54

so as these technologists help develop advanced solutions that enhance the way scientists and researchers access and analyse information. Just one more click. OK, you're already there. Thank you.

1:29:08

One stack back. Thank you. So that's just a few examples of our work at Elsa Theorem. So this slide slide is quite text heavy. By no means you're meant to read this or we are, we are going to share this slide deck with you. But a few things only I would like to mention. So we published more than 2700 digitised journals and also more than 43,000 ebooks, resulting in about 18%

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of the global output. So as I mentioned, we are one of the largest scientific publisher globally. Nearly all of our journals enable Open Access and we have more transformative agreements, also called Open Access agreements, in place than any other publisher.

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You know, a unique delta of data, analytics and evidence enabled us to innovate, to innovate and help our customers improve learning, sparking insights and improve decision making. So when we summarise it, we understand at LG fear that content and knowledge are our core and contribution to a scientifically literate society. So while we are growing the body of knowledge, we are also

1:30:25

evolving the ways that content is accessed

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and analyse, ensuring options for both authors and institutions. Next slide please.

1:30:42

So how do we provide access to Science Direct? Where? So Science Direct is our full text article platform where you can access our journal and book content or other solutions are linked like like Scopus for example, abstract citation database. So the most common method method of authentication is by Internet Protocol IP, IP address authentication from computers within your organisation.

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So this is the so-called one factor authentication.

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The setup process is straightforward. You provide your organisation IP ranges to Ultrafire

1:31:23

and then reconfigure and activate your account.

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If you wish to grant users or a group of users, um, access to content from outside your physical location, you have several remote access options to choose from. So we have the extended access session. So here the user experience continues and give automatic access for up to 48 hours.

1:31:50

Ohh. So after leaving your your IP address range as long as they work from the same device and browser and have cookies enabled? Yeah. So like activated for all

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then we have the the Federated authentication through SAML, for example Shibboleth and Open Athens. So here you have the flexibility to define and limit access, plus it provides a high level of protection of identity and personal details for your users.

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We also have VPN. So here this is provided by your organisation IT department and users logs into your intranet via the VPN and then they go to for example Science Direct or any other service we provide

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then we have to secure proxy server here institutions they're wishing to use a specialist intermediary such as Easy Proxy to authenticate users and provide secure remote access to authorised users. So this is being managed by your IT department. Then

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we have self minish a remote access for institutions that do not have another secure remote access methods in place. So this is probably the most barrier free method we support. So this option relies on institutional e-mail domains that you supply to us.

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But here you have to make sure that authorised users do not share passwords and credentials with anyone else.

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Then we have secure login. Here also creates a link that you code into your intranet or your library website.

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And last but not least, we have the registration ID now so an assigned admin administrator can configure and manage secure remote access for either individuals or groups or departments

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using our alpha admin tool. So each authorised user receives the registration ID and password by e-mail.

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Also a range of access methods to our solutions. Next slide, please, Vicky.

1:34:09

And we're also making the content available through Discovery Park platforms. So we partner with leading web discovery services providers to index full text articles and book chapters on Science Direct. So if your library uses one of the Discovery platform listed here, your users are able to successfully search the full text of your subscribed Science Direct journal article and book chapter through your library website.

1:34:38

Next slide, please.

1:34:43

Good Open Access very briefly because I'm sure you're everyone's probably more or less familiar with with the Open Access era. However, so what's the difference between gold and green Open Access for those who are not that familiar? So content published in gold Open Access journals is immediate, available and after acceptance

1:35:07

and the author has paid an Open Access publication fee. We call these the APC. The article processing charge, the user licence, defines how readers can reuse Open Access articles published.

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So for example, if you can, if you can translate this article now a cell or reuse it for commercial purposes, etc. So here the licence gets into the picture. So you can publish in an Open Access journal or in a journal which supports Open Access. We call them hybrid journals.

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Green means the published article is first only accessible by users who got access to a journal because your institution has a subscription to this content

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and after an embargo period of between 12 and 24 months, depending on the journal, an earlier version of your manuscript becomes available for other readers. So when I say it becomes available, there's actually something the user or the author needs to do themselves so they can self archive or deposit the accepted manuscript. So the earlier version, not the not the final one, into a repository

1:36:24

and from the funding body. So it could be from the funding body or from your institution.

1:36:31

So probably the disadvantages of green Open Access might be the embargo Times Now. So you have

to be sure to save and remember where you have saved your content, your manuscript and the post print or your computer which you self archive into a freely available repository from your institution for example.

1:36:54

So both types of Open Access include peer review process. Yeah, this is quality check no matter how you publish it. For Gold you pay a fee as I mentioned this article processing charge, and for Green you do not pay a fee.

1:37:09

Gold is giving immediate access for anybody in the world to reach, and Green is giving access to subscribed users via the institution first and then after an embargo. The accepted manuscript is available for the public.

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So there are also other types of Open Access available which I'm not going into too deep today, which is for example, bronze, bronze published version of record. A manuscript accepted means the publisher has chosen to provide temporary or permanent free access. So this is a decision decision by a publisher. So such articles are typically not available for reuse.

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Then we have, for example, the hybrid here, documents that are in journals which provide authors the choice of publishing Open Access. We have the Diamond or the Platinum Open Access, and these are journals which publish Open Access without charging authors

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an article processing charge. And they're also referred to. Yeah, no, they're referred to Diamond and Platinum

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because they do not charge either readers or authors directly.

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Have I forgotten something? I don't think so.

1:38:32

Yeah. OK. Next, next slide, please.

1:38:41

Elsevier. We offer a mix of publication models to reflect the different ways authors choose to publish articles also. And it has been a journey for everyone for the last 20 years.

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So as one of the fastest growing Open Access publishers, nearly all of our elders here 2900 journals enable Open Access publishing now including more than 800 fully Open Access journals called the Gold Open Access Journals

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in 20 in 2023. So last year we published more than 190,000 gold Open Access article. And this is the content everyone in the world has free access to in perpetuity.

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So in total what else? If your makes available there are more than 3.3 million validated. This is all quality check content Open Access articles to the community and we support more than 2000 institutions with Open Access agreements.

1:39:46

So in 2009, maybe it just if you're interested, we launched our first Open Access journal

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2013. We gave authors the option to publish Open Access, Open Access in most journals that we are previously subscription journals. And our first Open Access agreement has been with Finland actually in 2018 following with one year later with another five countries and one institution. So year on year, you see the number of Open Access agreements growing and including the UKSG Jisk Open Access agreement which is in place.

1:40:25

I think it believed.

1:40:29

Next slide please.

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So we are now in the era of Open Access agreement. There are sometimes they're called differently Open Access agreement, they're called transformative agreements or they're called publish and read agreements. They're basically all the same. So next to, for example, academic and government institutions, corporate institutions or healthcare are working together with consortium

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and Elizabeth has already reached Open Access agreements for more than 2000 institutions and mentioned this. And one of the latest deals in place which we're really excited about is for example, the deal in Germany. So deal Germany got back on board with Al Jafar by end of last year.

1:41:19

So disagreements

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also called big deal sometimes then negotiated usually with consortia as like the UK is just agreement. We we negotiate with the consortia with a multi year agreement between three to five years for the UK sector. It means that this agreement is providing unlimited and immediate Open Access to LGPS Science Direct publication in hybrid channels, as well as significant savings on total sector spent.

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So this agreement supports 157 institutions in the UK and means that alongside the sectors Open Access agreements, 80% of UK research can be made Open Access at no cost for authors.

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Next slide please.

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And indeed if you have specific question for pricing, then we have then have we have information available on our website. So as I mentioned, you will receive the slide deck from us.

1:42:25

And then next slide please, Vicky.

1:42:28

And then of course, let's stay. Let's go back to our core, our publishing background. Yeah. So traditionally we are we are a publisher. So let me just give you an example of how the peer review process works for a journal. So you see here on this slide deck, you see three columns. On the left hand side, the author and the editor. On the right hand side you see the reviewer. So the

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also submits a paper to the journal editor. The journal editor makes a

1:43:05

a decision if this article or this document meets the criteria now. So is this the in scope of what the journal is currently looking for? If yes,

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it will there John enable assign reviewers. Yeah, we have a reviewer database, but you're also sometimes asking for reviewers from the author. So then it will be, it depends 234 reviewers chosen and they will review the paper and that can take some time depending on the journal and the area. And then they will make a first recommendation

1:43:45

and then it depends, um,

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if it's a rejection or the reviewer will get back to the journal editor

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telling to have tell the author there are some adjustments need to be made. And this is actually, I would say in 99% the case. So it hardly ever happens that an article gets through peer review for the very first time right away. So no reason to despair. Then the author takes the reviewer comments into account, revise the section and resubmits it to the journal editor. So this is like the circle how that goes

1:44:23

the next click wiki.

1:44:26

So what do editors want actually now what are we looking for? So first of all, it should the content should be scientifically correct. I mean that go with it goes without saying probably. And it should report something new. So don't not not content which repeat something which is already out there,

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significant information published. And also it should interest the reader. And then

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and the top reason for rejection is it could be, for example, that the content does not meet the criteria. Maybe the journal focus change that can happen even during a year, the focus can change or it's poorly written. Yeah. So also here also should make sure that language is as good as possible. Ideally,

1:45:22

yeah, nothing is perfect, close to perfect.

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Um, maybe it could be the reason that he also was excessively self citing her or himself. So this could also be a reason to be rejected or poor geographical distribution of references. So all the content is only, let's say cited from the UK, but not global content is being considered. And it could also be that it's that the author did not have done their homework. So maybe they have

1:45:57

and their research takes months and then they edit all their references and then needed another. It can even take up two years to write an article. But they have not followed of what happened in the last two years and have not considered relevant references to include. So that could be that. The work is not up to date. So that could be all reasons to be rejected by the Journal editor.

1:46:22

Next slide please, Ricky.

1:46:26

So how do we support librarians? And before I get back to that, let me call and talk about Jenna. I, I think there is some we cannot get around Chennai these days. So how have we, endoscopically communication community, been responding to the rise of Gen AI so well?

1:46:48

When I have to summarise the response, I would say that we are collectively excited about the opportunities that technology brings and that we also see the need and urgency for establishing a framework on how to use it responsibly. So many publishers and organisation introduced their own guidelines and policies last year already. You might have done that already for your institution or you might still about

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to do it or in in the middle of the process. So that that really varies. So, so transparency. Transparency is key in the guiding principles.

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They're also cross publisher collaborations that aim to create a uniform and understandable guideline for our communities. So we work with other publishers together, for example, and there are a few publishers that do not allow the use of Genii under any condition. But most publishers including ourselves allow it to use by authors for improving language or if it's if it's properly

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was close that

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that Gen AI has been used. Yeah. So there's nothing wrong about it as long as the author is transparent about it.

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And we do also expect policies to evolve in the next coming months and years and and we will respond to developments in the technology. We take feedback from the scientific community and new legislation into account.

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And next slide, please.

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So if you're interested to learn more about Genai and the resources we have available for you for males with here, because we also included Geni, for example, in a couple of solutions, for example, in schools, the abstract citation database, but Science Direct is coming too. We are currently beta testing Gen AI with Science Direct. So there's more to come. And clinical key is already included too.

1:49:07

And next slide, please.

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So coming to the end, um, so we have a dedicated website for librarians too. So librarians, as we know, are lifelong learners. So you regularly engage with, let's say, new technology with new research workflows and new learning designs. So at Elsevier, we have resources that can assist you enhance your skills and advance your career. And at the heart of the institution, the library

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advances learning and scholarship. Yeah, and you foster collaboration and innovation. And here also fear. We provide information to librarians that can assist you to develop and share stories about the value of your library resources and services. Because this is often what we hear quite challenges to promote your library services to make your users aware what you licence. Basically what is available for the user to help them quickly

1:50:11

efficiently find content for example or analyse content.

1:50:17

Next slide, please.

1:50:20

So we're coming in my last slide, and we do not only support librarians and we also support research workflow. So researchers with the Elsevier Researcher Academy, we have a free resource available which you're more than welcome to use to provide to spread the word about. So here users are able to join free webinars or have access to fact sheets

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for recordings to all webinars on various topics around the research workflow. So every step in the research workforce we tried to support with guidelines and advice from experts and mainly external experts. So this sometimes are Elderfield speakers, but this is not a sales pitch. This is really educating users, for example on how to

1:51:15

store and save data. You also have your own management tools for example, or anything about copywriting and ethics for example.

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Also feel free to have a look at this. As I mentioned, this is a free source.

1:51:34

Good. So we're coming to the to the ends at our session. And yeah, if you have any question, I'm not sure about the timing. I hope it wasn't too long.

1:51:46

Thank you for your for your interest in joining the session and for for listening to me. Hello Richard, Nice to see you again. Hi Michaela, how are you? I'm good, good. Thank you so much for stepping in at the last minute again. It's good to see you. Obviously you've done a number of these events in the past anyway. Really. So we have got a couple of questions. We are tight on time, so I'll

1:52:13

just give you a couple and then maybe we can

1:52:17

pick those up. I can send them those questions through to you directly separately, and they're all coming from the same person anyway, so it's probably quite easy. So

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the question was around curiosity to know what a ticketed URL link is.

1:52:36

The ticket of the ticketed URL link. Sorry, my voice, you're a link. Wow. Now you got me a ticketed, you're a link. Let me look this up from you and we'll follow up on you on that. I think it was mentioned. Sorry, just to interject, I think it was mentioned on your authentication slide as a sort of

alternative authentication method, the ticketed URL, but that's fine to come back. Sorry, sorry, sorry. Yes, sorry. That's the URL

1:53:06

for. I think it was about formal information. Let me just quickly check that for you on the peer review process.

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Let me just see,

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was that about the publishing workflow? I think it was a little earlier than that you mentioned about authentication methods to Science Direct.

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OK, good. Let me see.

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Hmm,

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Good. Let me see. Did it? Did the

1:53:57

Yeah, I have to prescribe that indeed. And let me check this for you because this is this is something I, we, I don't hear often. It's not discussed a lot, but it's a good point. I will, I will follow up with you on that.

1:54:12

OK, great. And there's a there's a couple of questions from the same person as well. So, Michael, what I'll do is

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we'll share those with you. You might be able to see them in the chat. Hmm. Anyway, if you can from parties from Sylvia, Yeah, ones in relation to

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um, using an Open Access article in a YouTube video. Is that a commercial use? And then another question roughly around

1:54:38

publication of content in other languages and non-english languages. So there's there's a question relating to that as well. So yeah, yeah,

1:54:48

YouTube video, just my first idea with the YouTube video. I mean, if you're not selling something right,

then then it should be if you're discussing it depends on what the YouTube video is about outside. Yeah, but but something I'm I can certainly look up. Very good question actually. OK.

1:55:07

So thank you, Michaela. We'll let you get back to the rest of the world. Thanks for thanks for your time and the insights into the publisher view. Yeah, great to see you.

1:55:17

Good to see you too. Bye, bye everyone. Have a good day. Rest of the event,

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thank you.

1:55:24

Thanks for Canada. There's just one more question from Hannah. So Hannah will ask Michaela to answer that for you and separately as well. So then I think all that remains for me to do is to just do our brief sort of summing up and closing. So thank you again everyone for joining us and for all your questions and comments. We've had some really good interaction and really it feels like we've only scratched the surface, which is I,

1:55:55

it's inevitable with this, this seminar because it's, it's broad. It's broad because it needs to be broad. But there's so much more to dig into. And with that in mind, don't forget that there are other seminars coming up that you might be interested in. So do check out the UKSG website if you think maybe Open Access or usage that's for decision making might be relevant to you.

1:56:17

So I want to say another huge thank you to all our presenters, so Ruth and Anthony, Richard and Michaela for sharing their expertise with us. It's really appreciated.

1:56:30

Don't forget the presentations and recordings will be shared. And also, um, Vicky will send an e-mail asking for your feedback. So that's really valuable to us as well because it helps us know what worked and what didn't, what you found useful. And it does help us to sort of work on the, the next events. So that's really helpful if you could fill out our feedback for us.

1:56:50

And so I think that's everything in this. Richard, I've forgotten anything. Please do jump in. But thanks again. And yeah, hope to see you at another event.

1:57:03

That's great. Thank you. Thank you, everyone. Thanks for your time.

1:57:06