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“We own it” : dealing with “perpetual access” in big deals

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“We Own It”: Dealing With Perpetual Access In Big Deals

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What We'll Be Looking At

- Project Background
- CRKN and the Canadian Situation
- Definitions
- Perpetual Access Scenarios
- The Survey
 - Methodology
 - Holdings Survey
 - Qualitative Survey
 - Publisher & Consortium View
- Some Final Thoughts
- Discussion

Background to the Project

- E-journals, “big deals”
- Questions: What does “perpetual access” actually mean? What happens in practice? Is it working?
- CRKN:
 - Academic Press (AP)
 - American Chemical Society (ACS)
 - Institute of Physics (IOP)
 - Royal Society of Chemistry (RSC)
 - ScienceDirect (Elsevier)
 - Springer LINK (Springer)

CRKN and the Canadian Situation

- A-Zed = A-Zee
- CRKN=Canadian Research Knowledge Network

www.researchknowledge.ca

- Canadian situation vs. the U.S. situation

Definitions

□ Big Deals

- Bundled fulltext e-journals
- Direct from publisher
- Usually consortial

□ Perpetual Access

- The licensee should have access to the electronic content that falls into the years for which the licensee had a subscription
- Perpetual access vs. archival rights

A Perpetual Access Clause

(www.crkn.ca/pr/?modellicense=1)

- On termination of this Agreement, the Consortium, Authorized Users and Walk-in Users shall retain the right to access and use in archived form the content... On termination of this Agreement, the Publisher shall at its option:
- provide each Member, on request, with an electronic copy of the content of the Database for the period of time set out in Schedule 3 up to the date of termination, or
- provide for continued access to the Licensed Materials on the Server for the period of time set out in Schedule 3 up to the date of termination

Perpetual Access Scenarios

- ❑ Subscription to a journal that ceases publication
- ❑ Subscription to a journal that is cancelled by a library
- ❑ Subscription to a journal that is sold or transferred to another publisher
- ❑ Subscription to a journal whose publisher goes out-of-business
- ❑ Subscription to a bundle of journals that has a fluid title list
- ❑ Subscription to a bundle of journals where the publisher goes out of business
- ❑ Subscription to a bundle of journals where the publisher is bought completely or partially by another publisher
- ❑ Subscription to a bundle of journals that is not renewed by a library or consortium
- ❑ Subscription to a bundle of journals that is cancelled by a library or consortium

Perpetual Access Scenarios In Licenses

- License states that perpetual access is included
- License specifies a particular method of fixed media delivery
- License specifies that the content will be stored on the publisher's server
- License specifies that the content will be stored on a third-party server
- License allows for local loading of the content
- License specifies that the content can be included in a distributed cooperative caching venture
- License specifies that the content can be archived by the licensee in some way

The Survey - Methodology

- 64 university libraries
- 6 full-text e-journal packages
- Quantitative survey
 - holdings
- Qualitative survey
 - comments by email
- Publisher & consortium views

Titles Sold

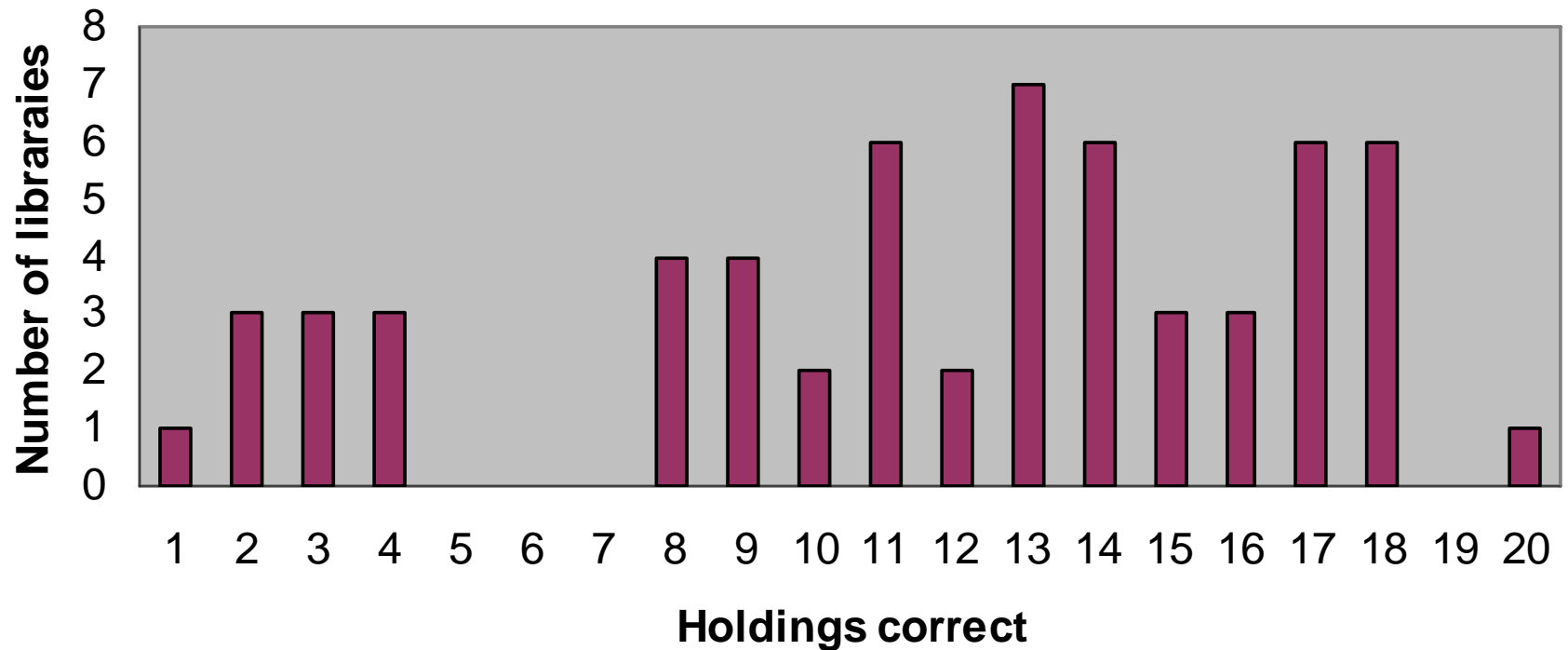
Title	Publisher	Date	Perpetual access?	Library holdings updated (of 60)
Geochemical transactions	RSC	2004	✓	36
Pesticide outlook	RSC	2004	✓	28
Acta mathematica scientia	Springer	2002	✗	60
Computational statistics	Springer	2001	✗	57
Amer. journal of evaluation	Elsevier	2005	✓	26
Cornell hotel & restaurant admin	Elsevier	2004	✓	32
Review of radical political econ	Elsevier	2003	✓	42
Thalamus & related systems	Elsevier	2004	✓	23
Journal of turbulence	IOP	2005	✓	24
Public understanding of science	IOP	2003	✓	14

Titles Added

Title	Publisher	Date	Library holdings updated (of 60)
Accounting forum	Elsevier	2004	27
Applied & preventive psychology	Elsevier	2004	28
Focus on pigments	Elsevier	2002	49
Jrl of cosmology & astroparticle physics	IOP	2004	35
Journal of geophysics & engineering	IOP	2004	44
Organic & biomolecular chemistry	RSC	2003	41
Photochem and photobiological science	RSC	2002	29
EcoHealth	Springer	2004	45
Landslides	Springer	2004	44
Sleep & breathing	Springer	2005	20

Holdings Survey

Summary of Holdings Accuracy



Qualitative Survey

- a) Is your library actively tracking titles transferred into and out of electronic journal packages licensed directly from publishers?
- b) Have you ever claimed your library's perpetual access rights to a journal that has been ***sold or transferred*** by the publisher?
- c) Have you ever exercised your perpetual access rights under a license to journal content for which you have ***cancelled*** the current subscription?
- d) We welcome any other thoughts that you have on the issue of perpetual access and e-journal packages.

Publisher and consortium views

- Consortium: “as difficult for us as it is for you”

- Publishers
 - Stability is important
 - Publishing is a business (therefore titles will be sold)
 - Best efforts to notify subscribers of sales

Further investigation

- Large vs. small libraries?
- Role of commercial providers in keeping holdings up to date

Conclusions – a role for each

- Librarians
- Intermediaries
- Publishers

Some Final Thoughts

- Some challenges not yet faced
 - Big publisher goes out-of-business
 - Not in court
 - Perpetual access for individual articles
- No going back
- Still early days

Questions? Discussion?



Some Suggested Discussion Topics

- ❑ Tell us about your situations – the U.S. perspective, the non-Canadian, non-US perspective
- ❑ Perpetual access success stories
- ❑ Perpetual access horror stories
- ❑ Perpetual Access vs. Archival Rights

Your Speakers

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