

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

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# What We'll Be Looking At

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- 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

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- 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

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

[www.researchknowledge.ca](http://www.researchknowledge.ca)

- Canadian situation vs. the U.S. situation

# Definitions

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## □ 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](http://www.crkn.ca/pr/?modellicense=1))

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- 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

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- ❑ 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

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- 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

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

# Titles Sold

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<b>Title</b>	<b>Publisher</b>	<b>Date</b>	<b>Perpetual access?</b>	<b>Library holdings updated ( of 60)</b>
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

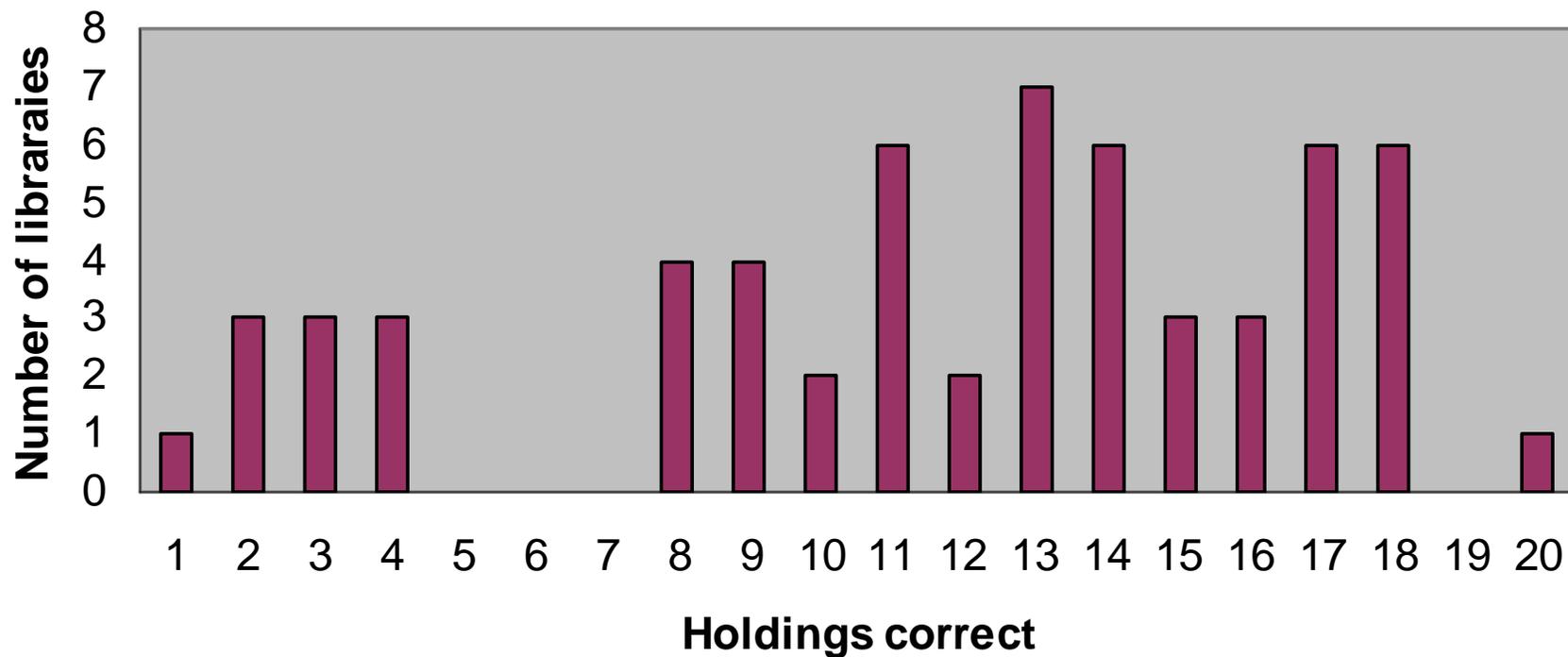
# Titles Added

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<b>Title</b>	<b>Publisher</b>	<b>Date</b>	<b>Library holdings updated ( of 60)</b>
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

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- 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

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- 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

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

# Conclusions – a role for each

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- Librarians
- Intermediaries
- Publishers

# Some Final Thoughts

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- 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?

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# Some Suggested Discussion Topics

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- ❑ 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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