



Online Library of Knowledge – b-on

Seminar on licensing e-resources in the south of Europe

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Outline

- What's b-on?
- Services
- Lessons learned



- **What's b-on**
 - Mission, Vision, Values
 - Goals
 - Participant bodies
 - Evolution
- Services
- Lessons learned



Vision/ Mission/ Values

Vision

- To be a strategical support for the construction of knowledge society, working as a fundamental knowledge tool for the national academic and scientific community.

Mission

- To ensure that the academic and scientific community has access to a wide number of scientific publications and electronic services.

Values

- Client focus
- Institution cooperation / knowledge share



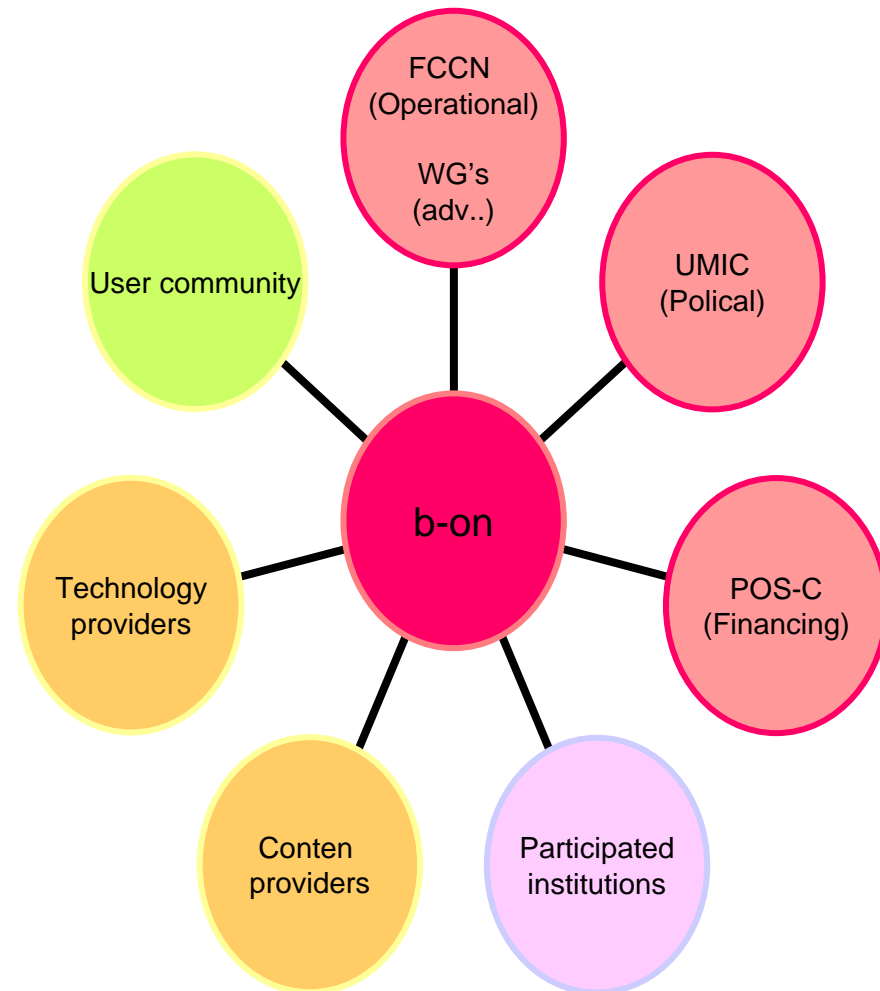
Goals

- Improve the national scientific system by having an active and participative role in the building of a knowledge society;
- Stimulate the consumption and production of scientific contents by the community;
- Promote electronic access to the main international sources of knowledge;
- Rationalize costs through centralize licensing with content providers;
- Stimulate the cooperation between national institutions of the academic and scientific systems;
- Develop key competences in information and knowledge management.





Participant Bodies

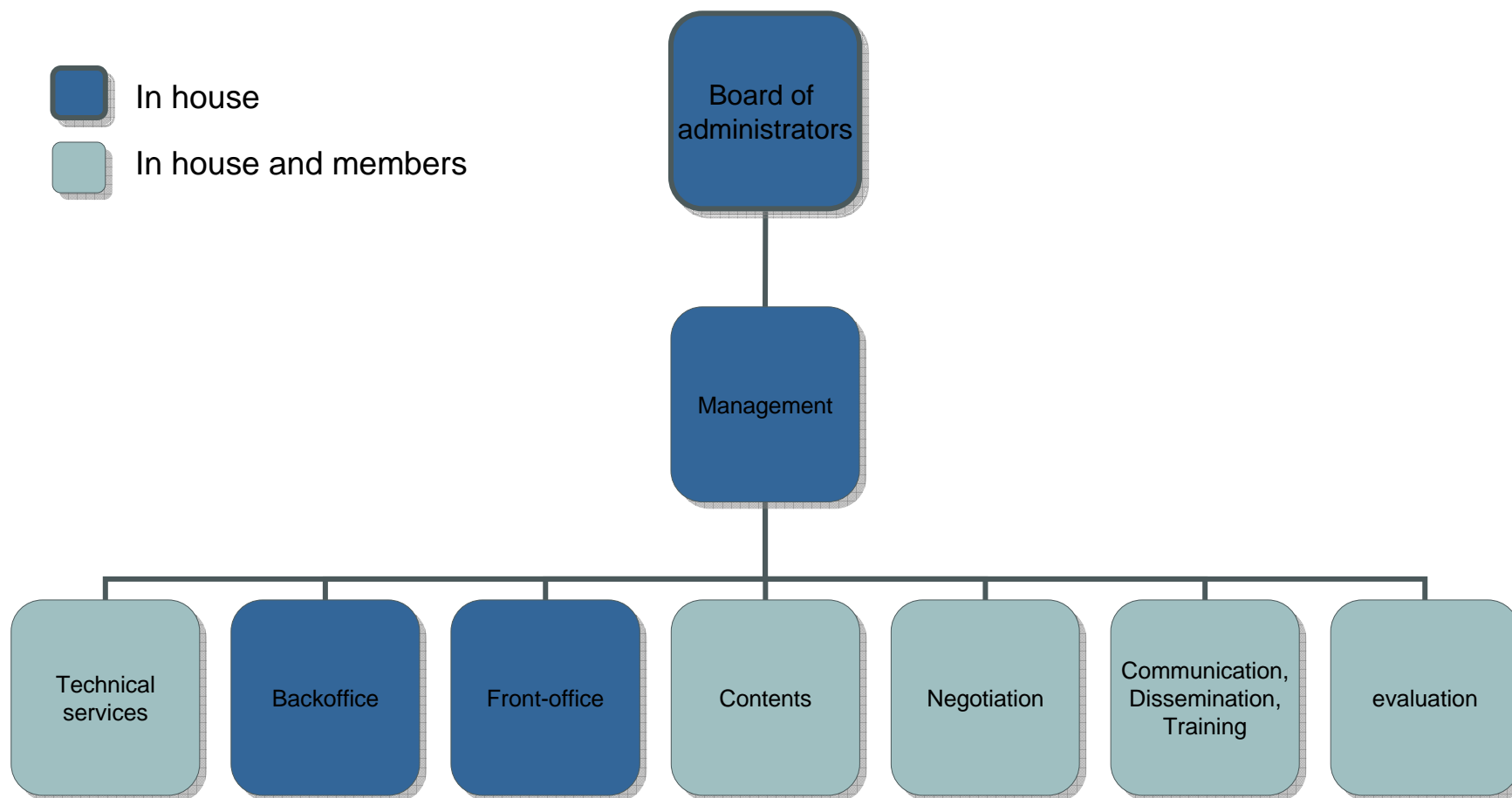
- **Management, Coordination and financing**
 - UMIC (Political coordination)
 - POS-C (Financing body)
 - FCCN e WGs (Operational management)
- **Participated institutions**
 - ICOLC
 - SELL
 - COUNTER
 - IGeLU
 - USE
- **Providers**
 - Contents
 - Technology
- **User community**
 - Academic
 - I&D
 - Hospitals
 - Public administration
 - Not for profit institutions





Operational body

-  In house
-  In house and members





Evolution

- First steps towards the creation of a “National S&T Network Library” (Science, Technology and Innovation Operation Program, III FP (2000-2006))

2000

- Inventory of scientific journals licensed by all national academic and research institutions
(Technology and Science Observatory)

2001

- WoK is made available through RCTS (Academic and Research network and Operation Program for Knowledge Society;



Evolution

2002-2003

- UMIC in conjunction with MCES (Higher Education Ministry) starts the process to implement b-on

2004

- B-on is launched in April with 48 institutions, 3,500 titles and 6 content providers.

2005

- More content is added: 16500 titles and 15 content providers



Evolution/ Financing

Until 2006

- 56% POS-C/UMIC co-financing
- 44% contribution from institution members in 44%

2007

- 100% POS-C/UMIC co-financing (only for public higher education)
- 50% POS-C/UMIC co-financing for the remaining institutions.

2008-2009

- 100% POS-C/UMIC co-financing (only for public higher education)
- 0% Co-financing for the remaining institutions.



Evolution/ Licensing

- *Until 2006 b-on licensing model was based on an All for All regime, i.e, all members had access to all contents*



Taylor & Francis

RSC Publishing



SpringerLink

Institute of Physics



Research Databases

AMERICAN INSTITUTE OF PHYSICS

Zentralblatt MATH



ISI JOURNAL CITATION reports.

Web of Science®

ISI ProceedingsSM

Current Contents Connect®



Evolution/ Licensing

- In 2007 *Some for Some* licensing model was introduced to contents from these providers:



Blackwell
Publishing

nature



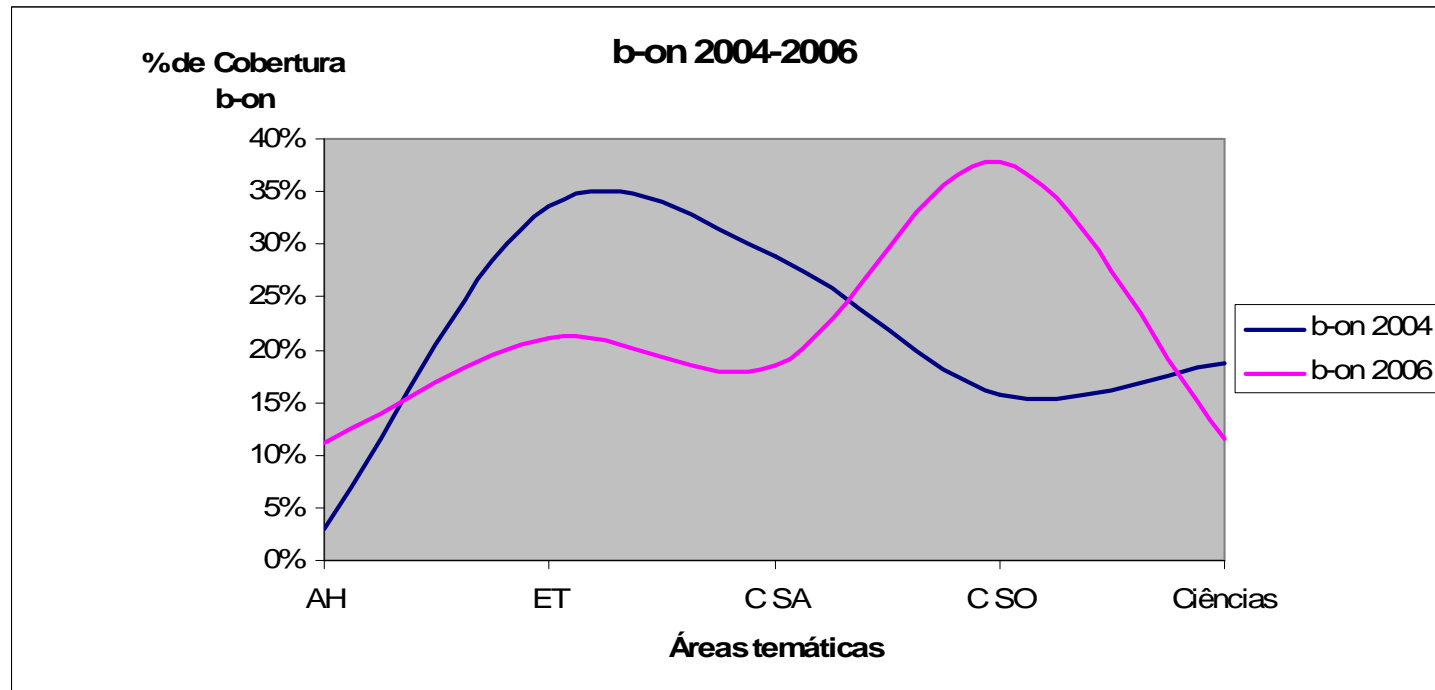
OXFORD
UNIVERSITY PRESS

- This content is not co-financed.



Evolution/ e-resources

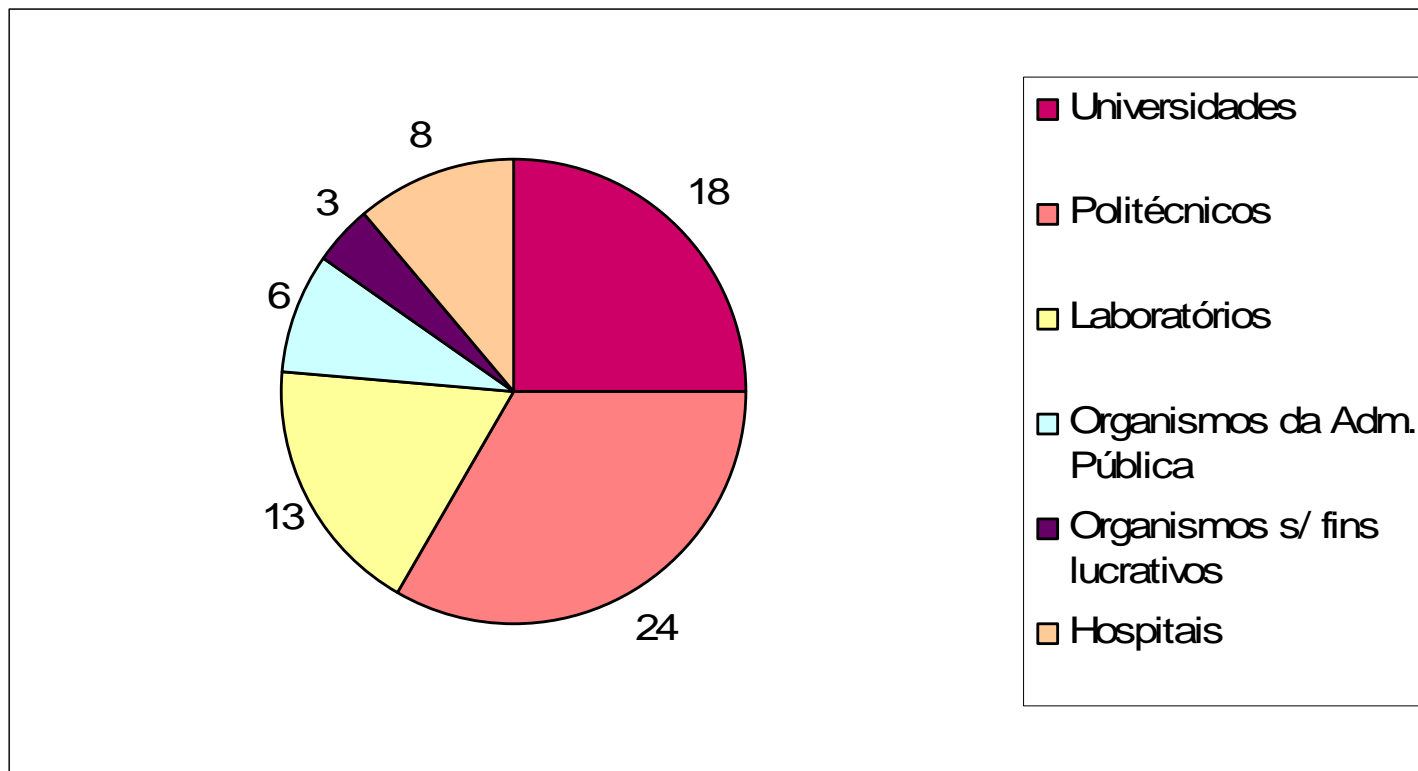
b-on gathers some of the main publishers and aggregators of international scientific journals and databases. It has started in 2004 with 6 subscribed resources (3511 titles) and moved to 15 (16750 titles) in 2005-2007.





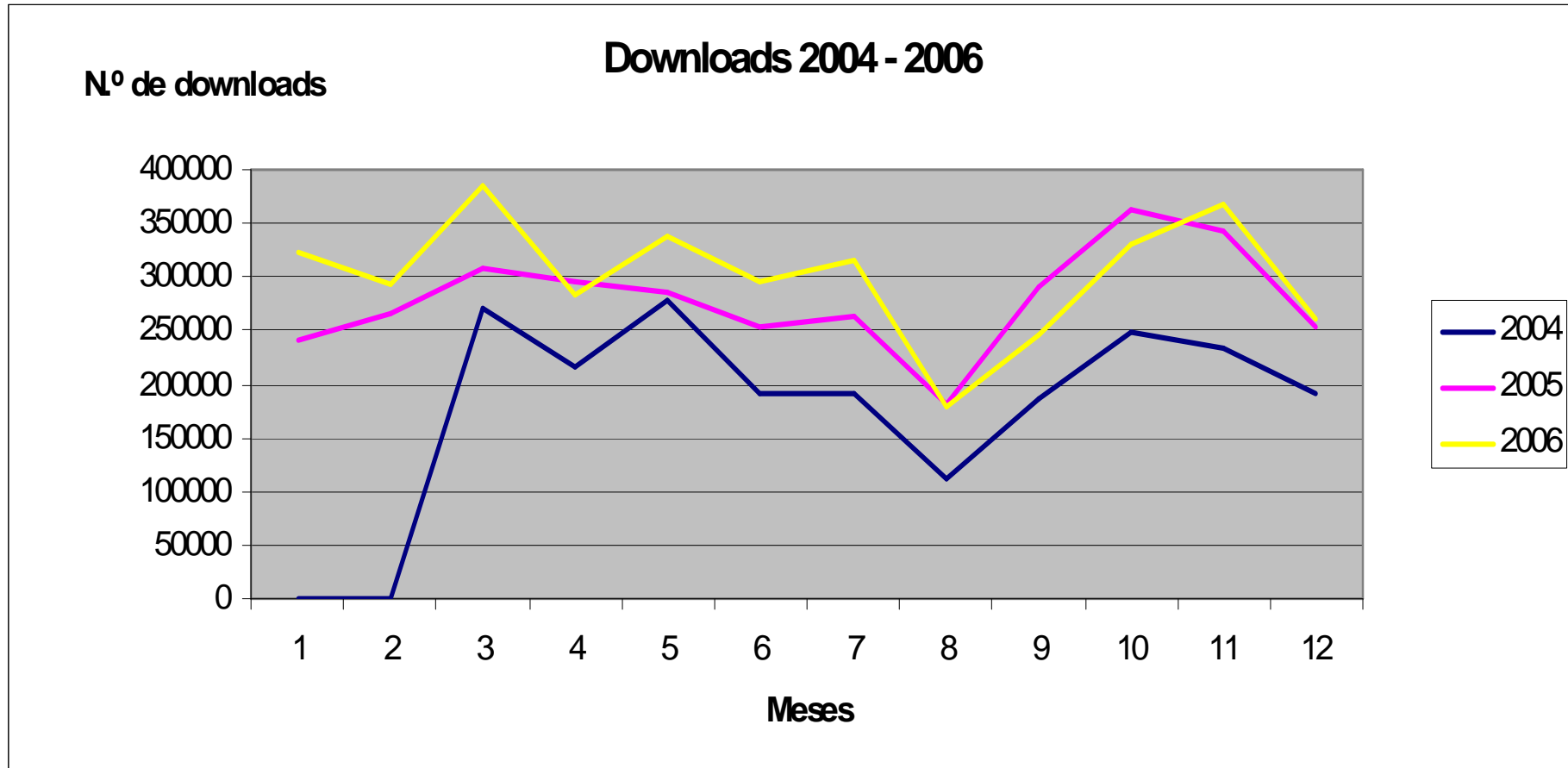
Evolution/ Membership

- B-on has started in 2004 with 48 members. In 2005 this figure has risen to 68 and in 2006 to 74. Nowadays it has 72 members.



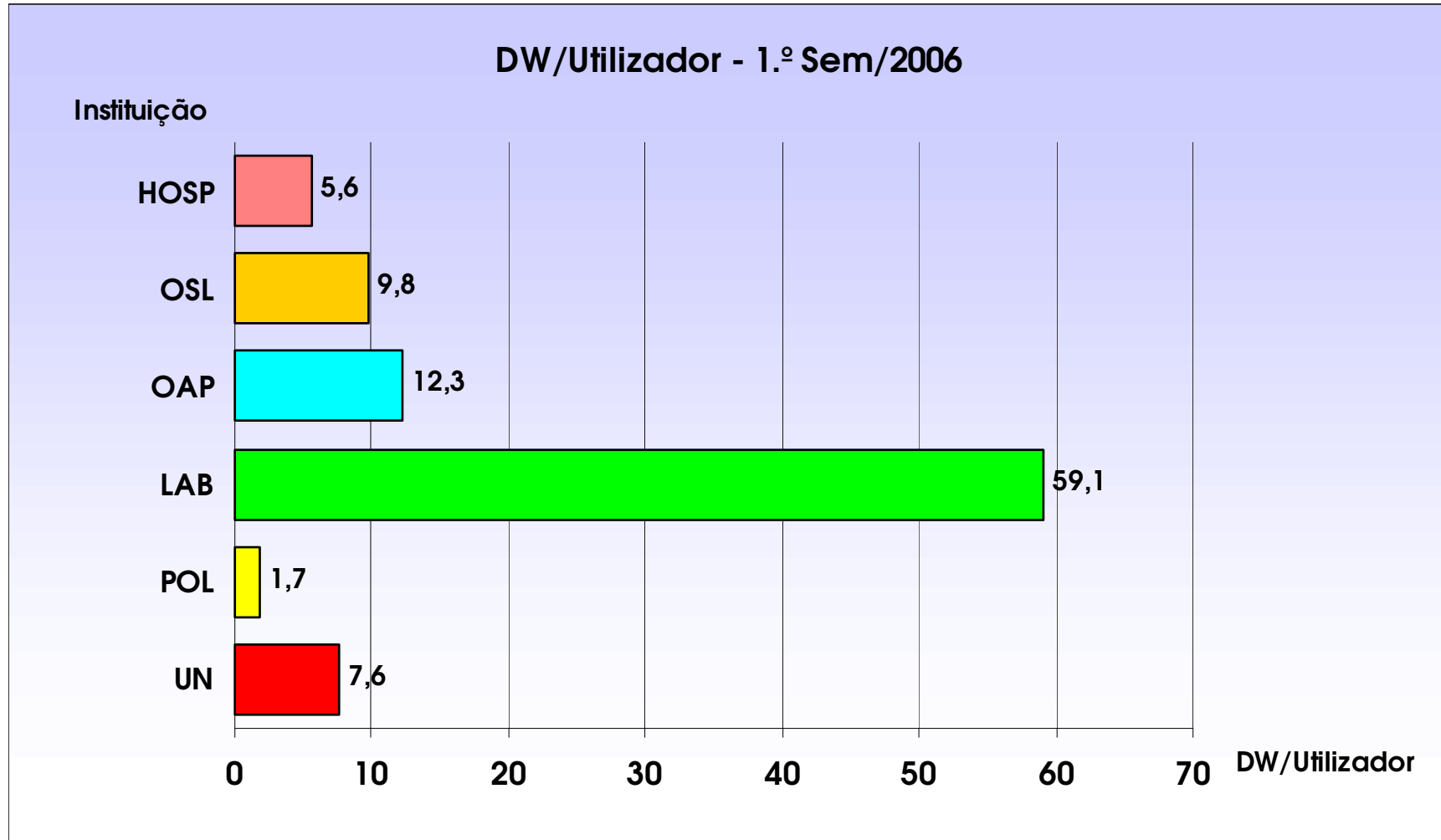


Usage/ Total downloads





Usage/ Downloads per user





Usage/ Benchmark

	FTE	Downloads	Downloads/FTE
b-on	313110	2.374.845	7,58
Ciber	317287	1.689.824	5,33
CBUC	185645	1.629.048	8,78

- Common publishers: Elsevier, Wiley, Springer / Kluwer, ACS
- Period: 2005



- What's b-on?
- Services
 - e-resource management
 - Communication, Dissemination and Training
 - B-on Portal
 - Evaluation
 - Negotiations/licensing
- Lessons learned



Communication and Dissemination

Goals :

- Disseminate and promote b-on usage among the community
- Keep librarians and user community informed about the project

Some materials:

- b-on manual
- User manual
- User's guide
- Pamphlet

Tools

- General website
- Librarians website

Others

- Reports, meetings, etc





Training

Goals :

- Develop, together with professional community in order to:
- Disseminate b-on services
- Optimize usage

Tools:

- Classic training
- M-learning

Figures:

- 2006: 21 sessions, 400 trainees
- 2007: 26 sessions, 500 trainees





Negotiations

- Goals
- Approach
 - Prepare team
 - Create a guide for negotiations
 - Planning
 - Prepare tools
- Remarks

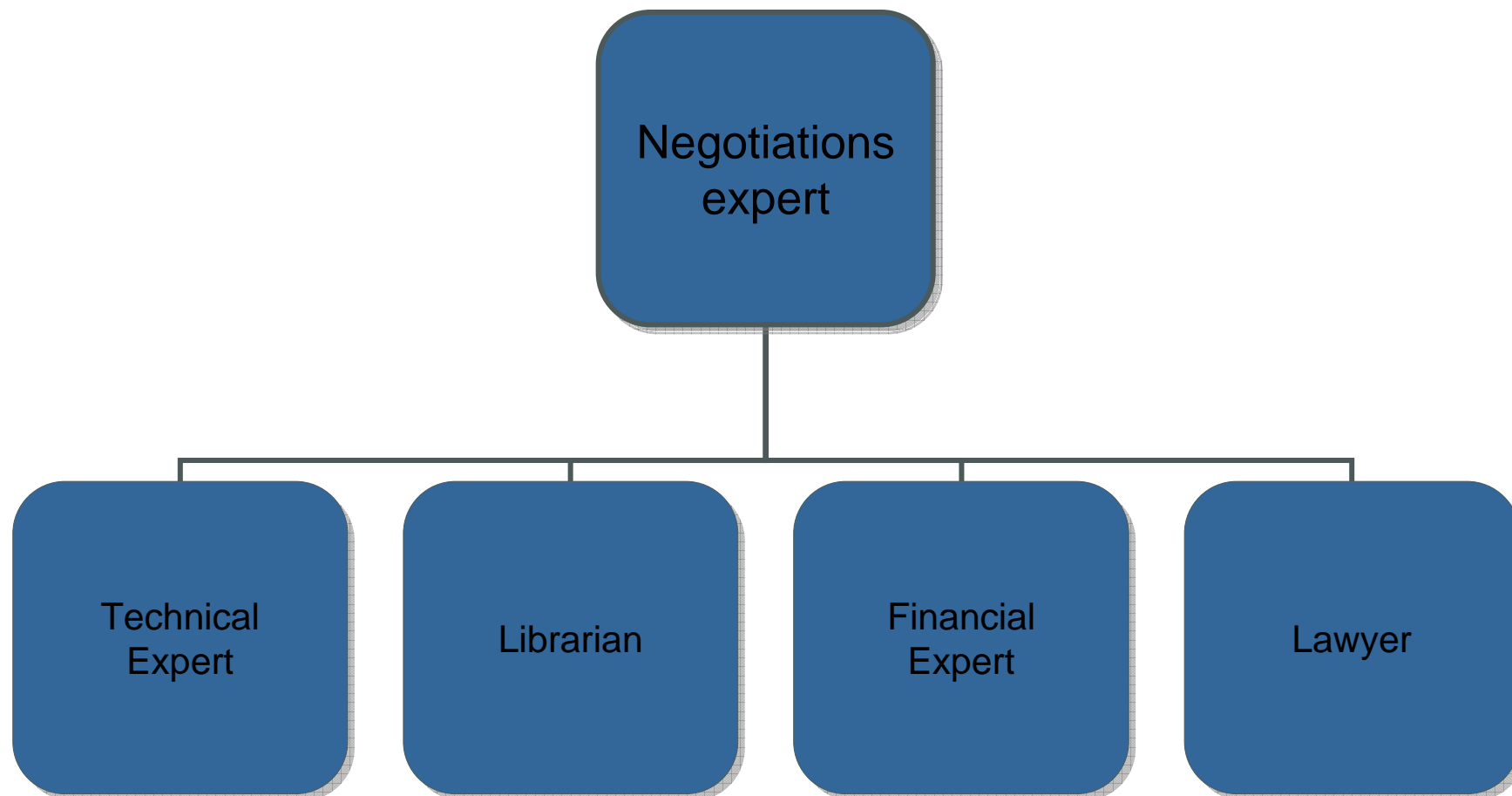


Negotiations / Goals

- Sustainability
- Good deal conditions
 - Content
 - Technical
 - Management



Team





Negotiations guide - General

- Minimum Authorized usage
- Liability for unauthorized usage
- Access
- Access outside the institutions
- Walk-in users
- Interlibrary loans
- Governing Law and Jurisdiction
- License Model

2.1 Minimum Authorised usage

1. Authorise usage **must** cover, at least, downloading, storing, local printing, usage of information for classroom purposes, linking or content copying for on-line support to courses. Minimum requirement for end users: reading, downloading and printing for personal usage with no restrictions.

Please state if you agree with all this conditions. If not, please state which of those conditions you don't comply with. In this case, please state if and when will you be able to comply with them.

Publisher's answer	Date

2.2 Liability for unauthorized usage

2. No liability for FCCN based on infringements by end users

Please state if you agree with this condition.

Publisher's answer	Date

2.3 Access

Access by various types of institutions:

- public and private universities;
- politechnical institutes;
- R&D institutions;
- public institutions (parliament, governmental bodies, etc);
- non-for-profit private institutions;
- hospitals (public and private).

Please state if you agree with all this conditions. If not, please state which of those conditions you don't comply with. In this case, please state if and when will you be able to comply with



Negotiations guide - Contents

- List of titles
- Title's changes
- Backfiles
- Perpetual access

2.1 List of titles

Each content provider **must** forward, in digital format, the following information:

- list of titles with ISSN
- list of titles published only in electronic form
- List of titles with embargo and it's length (*)

Each content provider **may** forward the following information:

- list of titles per scientific area
- impact factor per title

This information **must** be sent until 15th of May.

2.2 Title's changes

1. The content provider **must** inform b-on of any modification in the titles made available to consortium's members (eg. new titles, cancellation of titles, changes in title's names) within 5 days of it's occurrence. This information **should** be provided according the specifications for RSS defined in the Technical Annex.

Please state if you agree with this condition and how do you comply with it. If not, please state if, when and how will you be able to comply with it.

Publisher's Answer	

2. When a content provider acquires new titles and includes them in the licensed package, access to those titles **must** be provided without additional cost.

Please state if you agree with this condition.

Publisher's Answer	



Negotiations guide - Technical

- Web standards and file formats
- Federated search
- Metadata Harvesting
- News and alerting
- Context-sensitive linking
- Statistical data in accordance with normalized criteria
- Standard data container for moving Project COUNTER usage statistics into a digital repository (SUSHI)



Negotiations guide - Financial

- Payment
- FTE
- Discounts
- Reimbursement
- Price cap
- Cost per Institution
- Cost model
- New members and Fees
- Invoice Requirements
- Electronic Subscription Services

2.1 Payment

B-on requires payment to be made in two annual installments: the first one in the beginning of January of each year and the second in April of each year. The first invoice will be send only after the contract is signed.

Each invoice to be paid 60 days after being received by FCCN
Can you guarantee this? If not which conditions do you propose?

Publisher's answer

2.2 FTE

For the purpose of the negotiations and the license to be signed FTEs means:

- in case of universities and polytechnics, the number of teachers and researchers;
- in the case of R&D institutions, the number of researchers;
- in the case of hospitals, the number of doctors or beds;
- in the case of public institutions (parliament, governmental bodies, etc) and non-for-profit private institutions, the number of senior staff.

Please state if you agree with this condition. If not please state which definition of FTE do you propose.

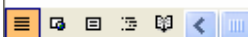
Publisher's answer

2.3 Discounts

A reasonable discount **should** be considered for the acquisition of paper copies by the members of the consortium.

The price to be paid **should** cover exclusively the costs of printing and posting (content access is already covered by the electronic subscription).

Please state if you agree with this condition. If not, please state what kind of discount are you willing to provide.





Negotiations guide - Management

- Institutions
- IP changes
- Admin Tools

2 Institutions

B-on consortium is formed by several institutions and sometimes some of them are organized in sub units, eg. universities are divided in several faculties.

In order to simplify management b-on has defined a numbering system as follows: "XYYZZ", where "X" represents the institution type, "YY" the institution number and "ZZ" the sub unit. For instance, 00201 is Universidade do Algarve - Faculdade de Ciências Sociais e Humanas. In this example the first number, "0", means that the institution type is a university, the second and third numbers "02" represent the university code and the fourth and fifth "01" are the sub unit code.

Content providers **must** implement this coding system by the 1st January 2007.

For management and statistical purposes content providers **must** provide accounts both for the consortium and each of their members. Additionally, content providers **should** provide accounts for sub units.

Please state if you agree with these conditions. If not, please state how long will take you to implement those conditions.

Publisher	Date

3 IP changes



Negotiations / Planning

- 1.Submission of this document
- 2.Proposal and reply to this document by the publisher
- 3.Negotiation
- 4.Inquiry to b-on's members
- 5.Signing of licenses
- 6.Preparation for access
- 7.Access

Negotiations take time.

We estimate around 1,5 years FTE to complete last negotiation process

Phases	Mar						Sep	Octob	Novemb	
	h	April	May	June	July	August	t	er	er	Dec.
1										
2										
3										
4										
5										
6										
7										



Negotiation / Prepare tools

Publisher	Cost/DW	Cost/title	DW/title	Cost/FTE	DW/FTE
A	2,30	2.507,00	1092,26	14,26	6,21
B	2,04	1.084,02	530,70	1,42	0,69
C	15,98	3.822,23	239,16	0,70	0,04
D	4,79	870,18	181,51	3,21	0,67
F	0,81	6.110,80	7530,35	0,60	0,74
Average	4,00	3.116,06	1.361,79	1,78	0,78

Publisher	Member	Expenditure	Journals	Cost/Journal
X	A	39.976 €	84	476 €
X	C	23.950 €	43	557 €
X	D	27.787 €	41	678 €
X	E	17.627 €	30	588 €



Remarks /Red lines

- Price cap
- Individual quotes / S-S
- Content variation / price variation

- Penalties



Remarks / Editor Back thoughts

- “Bad ones”
 - Reduce income = loose job
 - How much money do you have?
 - Increase market share either by selling you more content or by giving you no other change than give up other contents
- “Good ones”
 - Survive



Outline

- What's b-on?
- Services
- **Lessons learned**



Lessons Learned

- Political commitment
- Sustainability
- Cost distribution. What's fair?
- Licensing model
- Dissemination and training
- Institution members commitment
- Institution members cooperation



Thanks!

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