

COLLABORATION, EXCLUSIVITY, CHOICE OH MY!

**AMIRA AARON
ASSOCIATE DEAN, SCHOLARLY RESOURCES,
NORTHEASTERN UNIVERSITY LIBRARIES**

**Libraries and
Content
Neutrality in
Discovery
Systems and
beyond**

OVERVIEW



- **WHAT IS THE MAJOR ISSUE FOR LIBRARIES?**
- **CONTENT NEUTRALITY & DISCOVERY SYSTEMS**
- **DANGERS OF EXCLUSIVITY**
- **A & I INDEXES**
- **ABOUT NORTHEASTERN UNIVERSITY LIBRARIES & DISCOVERY**
- **IMPORTANCE OF COLLABORATION AND TRUST**
- **WHAT CAN LIBRARIES DO?**

WHAT IS THE MAJOR ISSUE FOR LIBRARIES REGARDING “CONTENT NEUTRALITY”?

- Libraries are traditionally neutral in presenting the best content to their users based on professional expertise and financial realities
- Libraries are paying significant money to purchase or lease content from content providers
- Libraries are also paying large amounts for discovery systems and investing in significant staff time
- Libraries have had choice in what content they purchase or lease and how they present this content to their patrons
- This choice is being taken away by the content providers and vendors – especially those with their own discovery systems
- **Assertion - Libraries and their users have the right to choose the system/platform by which their users discover licensed, paid content**

WHY IS CONTENT NEUTRALITY SUCH AN ISSUE WITH DISCOVERY SYSTEMS?

- A discovery system needs an intuitive interface, a good relevancy ranking program, functioning availability/delivery information – **but ultimately it is only as good as the content covered by the system**
- Because discovery systems rely on harvested content from content providers, it is critical that they receive rich metadata and content from the content providers on a timely basis!
- **Content providers need to provide rich quality data to all discovery systems equally!**
- Content providers with their own discovery systems are now withholding content from competing discovery systems
- Competing content providers/aggregators not working with each other

WHAT ELSE AFFECTS CONTENT NEUTRALITY?



- Extent and quality of metadata
- Relevancy ranking – results can be skewed to a particular provider’s content – we need to ensure neutral treatment of content
- Fair and accurate linking
- Libraries have responsibility to understand and control as much as possible the content neutrality in the discovery system
- Exclusive deals between content providers and vendors (e.g. Harvard Business Review)
- Big money is involved... library needs are being ignored and scholarly research suffers on campus

DANGERS OF EXCLUSIVITY



- Cable TV analogy
- Similarly, libraries and their end users are being forced to do without important content or to pay multiple times for competing platforms to cover all content
- Reduction of competition mean increased prices with no options
- Various types of exclusivity: content, metadata, interoperability
- Publishers and databases need to stay afloat, but they also must understand the needs of their customers
- Content should be offered to reach as many readers as possible
- Exclusive deals now being done for interoperability between systems; again, library choice is diminished
- Exclusive deals increasing in our industry – both publishers and A&I databases

A & I INDEXES



- Valid concerns:
 - Metadata is their value; should they give it away?
 - Fear of cancellations due to discovery systems
 - Results merged with no “credit” given for citation & no usage stats.
 - Results not as targeted; metadata searching not as effective

However:

- Large group of users will still not use multiple databases – especially undergraduates, so the content will not be discovered at all if not in discovery system
- Search & delivery can be restricted to subscribers
- Dedicated A& I subject indexes still important for graduate students and faculty – not likely to be cancelled

A & I INDEXES (continued)

- Value diminished if not in discovery system at all, no matter how sophisticated the metadata searching is – becomes target for cancellation
- Discovery providers need to all work on developing features to highlight the source database and recommend best databases for a search
- Discovery providers need to add more sophisticated metadata searching, especially subjects
- A& I index providers being pressured for expensive, exclusive deals with aggregators and also being dissuaded from contributing to all discovery systems
- We need to organize conversations among all parties and foster collaboration; libraries need to talk directly to A & I index providers

NORTHEASTERN UNIVERSITY LIBRARIES

- Urban research library serving over 26,000 FTE in Boston and other sites – great deal of online and hybrid education
- Ex Libris Primo discovery system – primary public interface for past 2 years. Default scope is catalog plus articles
- Alma library management system has no public interface
- Before Primo, used EBSCO Discovery System (EDS) for 2 years
- 3,306,355 searches logged for FY14 in Primo
- By contrast, 2,213,127 searches in major databases (including full-text and A&I)– down in half from previous year
- Usage of major e-journals has increased significantly. From FY11 to FY12, 88% increase; From FY12 to FY13, 53% increase.
- Increase partly due to discovery systems and partly due to significant increase in availability of full text.

NORTHEASTERN UNIVERSITY LIBRARIES (CONTINUED)

- Inter-library loan referral source now largely identified as Primo and not as much external databases
- Important that all paid content is available through Primo
- We subscribe to a large number of EBSCO databases and also a significant number of ProQuest databases and full-text collections – both have competing discovery systems
- Listening to customer feedback, ProQuest agreed to give most metadata and even full text to Ex Libris for indexing in Primo
- **At the end of the last fiscal year, we transferred significant content and money to Proquest after evaluation and review of databases and platforms by our subject specialists**
- Wrote to faculty and explained the platform moves; no real loss of content and no complaints that we've heard
- We are among Ex Libris customers asking Ex Libris and EBSCO to cooperate fully
- Negotiations are not going well

IMPORTANCE OF COLLABORATION AND TRUST



- The scholarly communication “industry” has always been based on trust and collaboration
- Complex ecosystem where all of the parts need to work together
- Increased competition from major search engines and others outside our industry – narrow profit margins
- Although vendors do still participate in standards development and work on interoperability, “good faith” efforts are sometimes questionable
- As a vendor many years ago, were we more interested in helping our clients and their users?
- Questionable practices - “Winning the discovery war”
 - Withholding of full metadata to promote their own discovery systems
 - Encouraging exclusive deals to force business and sell more products
 - Promoting certain content over others

WHAT CAN LIBRARIES DO?



- Try to get neutral discovery options in licenses – see new revised LIBLICENSE model license →
- Support vendors/publishers who collaborate
- Support vendors/publishers who follow NISO ODI guidelines
- Advocate in writing and at meetings for collaboration and to end exclusivity in any form
- Educate the faculty and scholars about the issue
- Advocate for Open Access and participate in initiatives
- Set up professional meetings with publishers and vendors, especially A & I vendors, to discuss the benefits of collaboration, the realities of discovery systems, and the needs of the scholarly communication chain
- Participate in and follow standards activities and their implementation
- Put our money where it counts!

REVISED LIBLICENSE MODEL LICENSE AGREEMENT – CRL, ARL, CLIR, CDL, ETC.

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- **5.1.b. *Discovery of Licensed Materials.*** Licensor shall make the Licensed Materials available through Licensee's Discovery Service System(s) for indexing and discovery purposes. Licensor shall provide to Licensee's discovery service vendors on an ongoing basis the citation and complete descriptive metadata (including all subject headings, abstracts, and keywords), and full-text content necessary to facilitate optimal discovery and accessibility of the content for the benefit of Licensee and Authorized Users. Discovery Service Systems are defined as user interface and search systems for discovering and displaying content from local, database and web-based sources.
- **5.1.p. *Itemized Holdings List...*** Licensor will use reasonable efforts to update itemized holdings reports as soon as is practicable when holdings information changes, and will provide this information to Discovery Service Systems in a timely manner and to Licensee on request.

DISCUSSION AND QUESTIONS

a.aaron@
neu.edu