

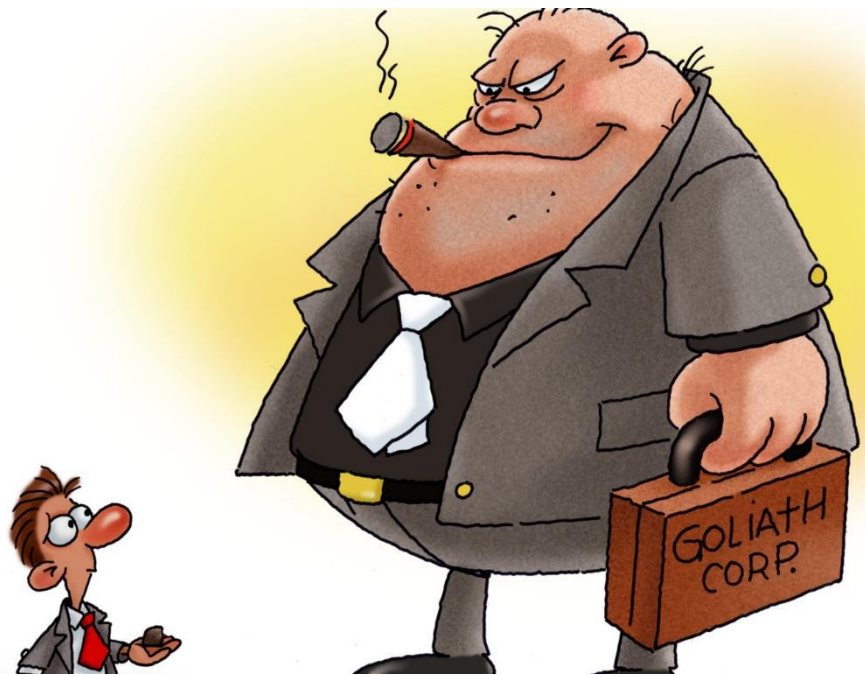


To unbundle journal's big deals or not? The Université de Montréal's experience

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- Université de Montréal's context
- Analysis of journals collection as a solution : the methodology
- Decision making

2nd GREATEST RESEARCH UNIVERSITY IN CANADA

according to Research Infosource

Université de Montréal
\$548.8M

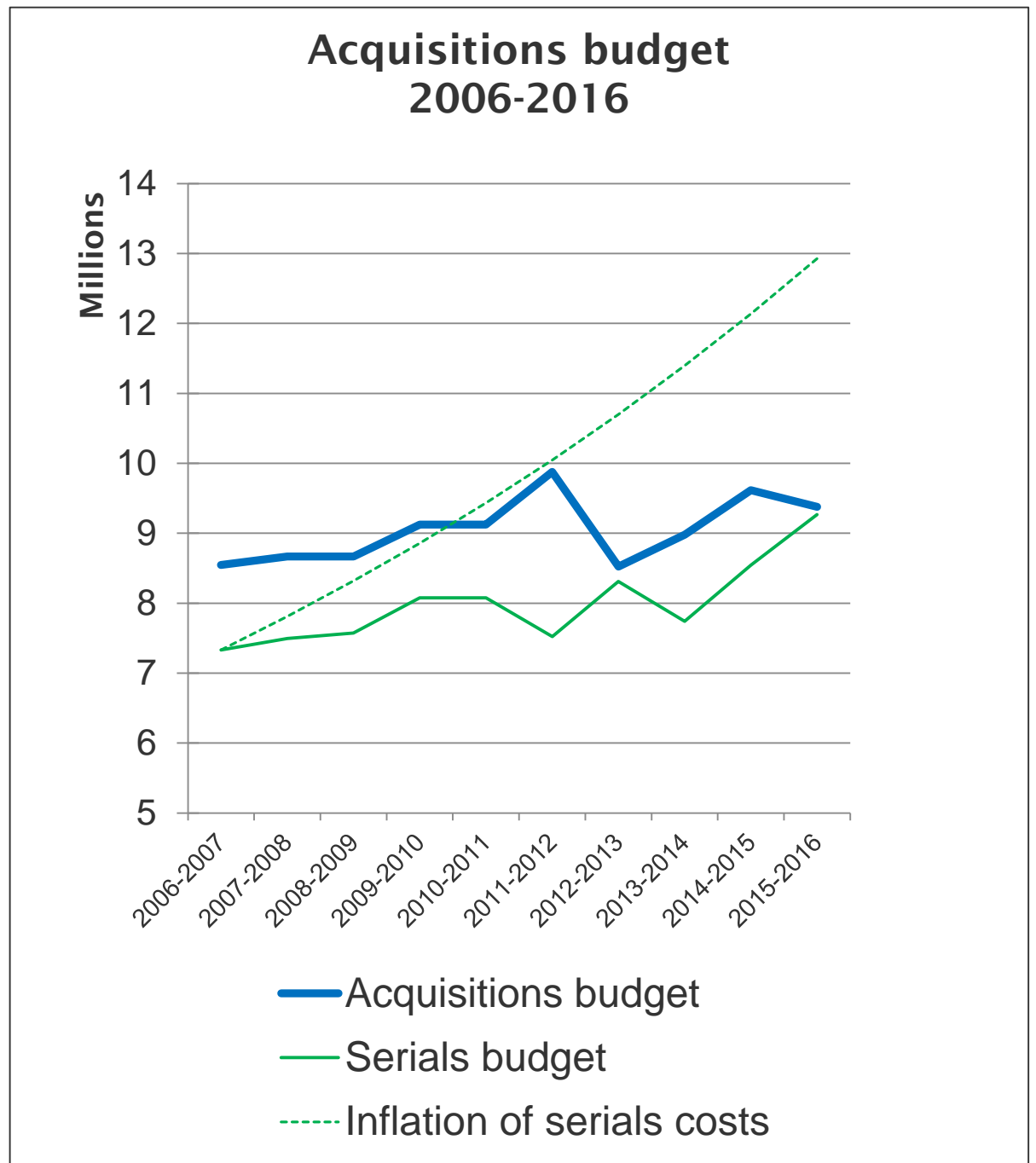
UBC
\$547.0M

University of Toronto
\$1.04G

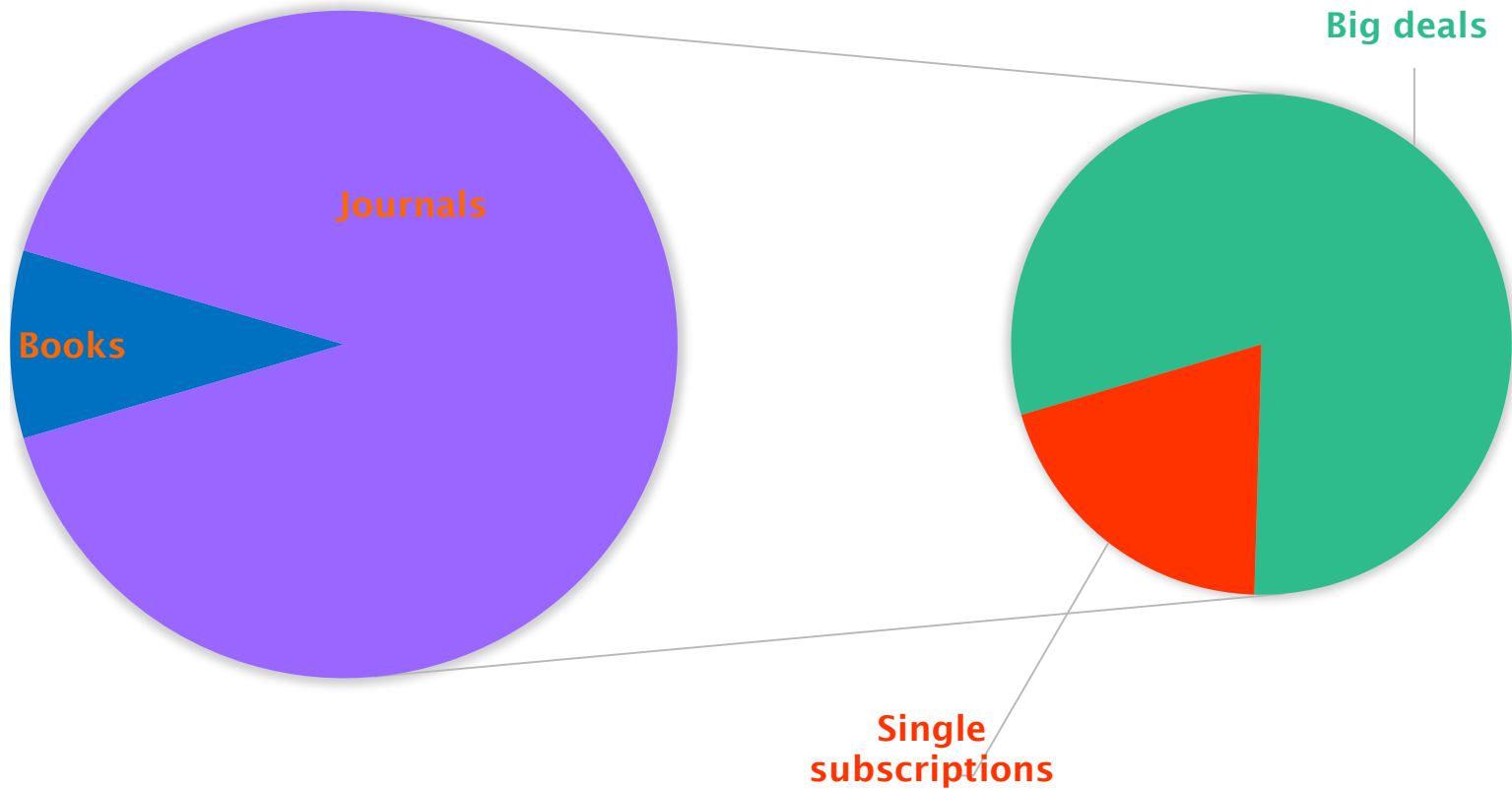
McGill
\$477.0M

Research Income

a breaking point



Why analyse those big deals ?



The «Wiley methodology» : our 1st unbundling experience, 2014

- Methodology
- Results
- Feedback from our community



Working group on the journals collection

1. Improving the methodology
2. Take in consideration the community needs
3. Detailed results of the analysis :

Rapport du groupe de travail sur la collection de périodiques (see executive summary in english on p.V-VI)

www.bib.umontreal.ca/a-propos/rapport-gtcp-vf_14-10-2015.pdf



Five easy steps to identify the most valued titles for your community

Step 1 : Survey of the community

Step 2 : Quantitative data collecting

Step 3 : Identification of essential titles

Step 4 : Consultation with departments

Step 5: Final arbitration by librarians

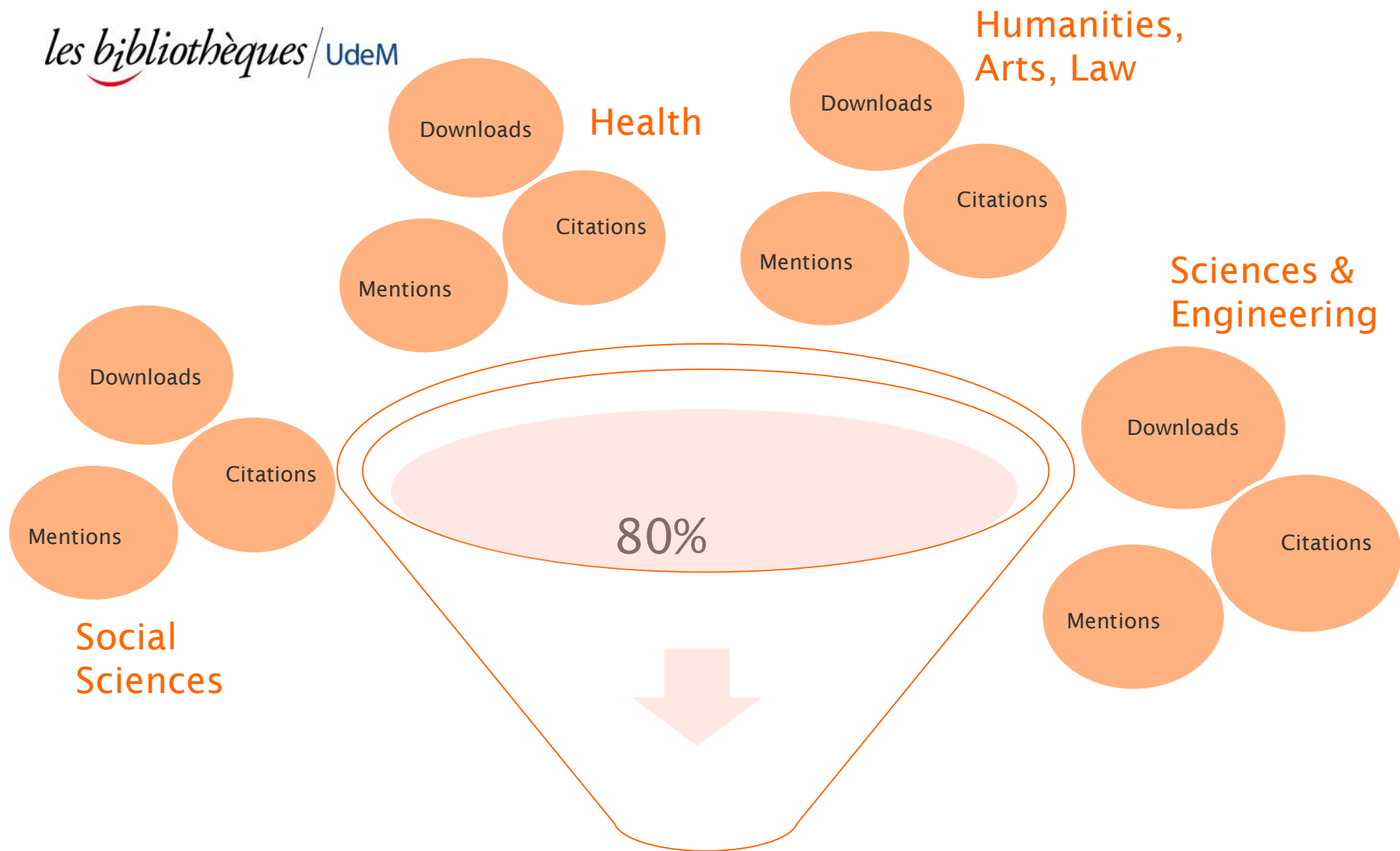
Step 1 : Consultation with the community

1. Ten essential titles for your research and teaching activities
2. Five essential titles for your subject area



Step 2 : Collecting quantitative data for 50,000 titles





Step 3 : Identification of «Essential titles»

Step 4 : Validation of the list by departments

Liste des titres par grands domaines

Sciences de la santé

Sciences de la nature et génie

Droit, sciences humaines et sociales

Liste des titres suggérés par unités

Département de Kinésiologie

École d'optométrie

École de santé publique

- Administration de la santé
- Médecine sociale et préventive
- Santé environnementale et santé au travail

Faculté de l'aménagement

- Architecture
- Architecture de paysage
- Design industriel
- Urbanisme

Faculté des arts et des sciences

- Anthropologie
- Bibliothéconomie et des sciences de l'information
- Chimie

Faculté des arts et des sciences (suite)

- Littératures et de langues modernes
- Littératures de langue française
- Mathématiques et de statistique
- Philosophie
- Physique
- Psychoéducation
- Psychologie
- Relations industrielles
- Science politique
- Sciences biologiques
- Sciences économiques
- Service social
- Sociologie

Faculté de droit

Faculté de médecine (suite)

- Obstétrique-gynécologie
- Ophtalmologie
- Orthophonie et d'audiologie
- Pathologie et biologie cellulaire
- Pédiatrie
- Pharmacologie
- Physiologie moléculaire et intégrative
- Psychiatrie
- Radiologie, radio-oncologie et médecine nucléaire
- Réadaptation

Faculté de médecine dentaire

- Dentisterie de restauration
- Santé buccale
- Stomatologie

Faculté de médecine vétérinaire

- Biomédecine vétérinaire

Step 5 : Final decision by librarians



Global results of the analysis

	Out of 50,000 journals
Used journals	16,816
Cited journals	9,075
Journals mentioned by our community in the survey	8,060
subtotal	26,843 unique titles used/cited/mentioned
«essential titles» (80%)	4,852
Additional titles (from validation by departments)	1,041
subtotal	5,893 unique essential titles
2,940 titles with quantitative approach	2,953 titles from community consultation

UdeM's Essential titles in big deals

Top 5 publishers	Big deal	UdeM's Essential titles
Elsevier	2,200 +	735
John Wiley & Sons	1,500 +	553
Springer-Nature	2,300 +	266
Taylor and Francis Group	2,000 +	253
Sage Publication	700 +	247

Prices for individual subscriptions to essential titles (list price)

Big deal negotiated price	50 % scenario	60 % scenario	70% scenario	80% scenario
Publisher A (175,000\$)	100,000\$	125,000\$	150,000\$	250,000\$
Publisher B (500,000\$)	425,000\$	550,000\$	700,000\$	950,000\$
Publisher C (500,000\$)	150,000\$	200,000\$	375,000\$	700,000\$
Publisher D (775,000\$)	300,000\$	500,000\$	800,000\$	1,200,000\$

What is a fair price for that big deal ?

Publishers' price

Fair price

All the titles

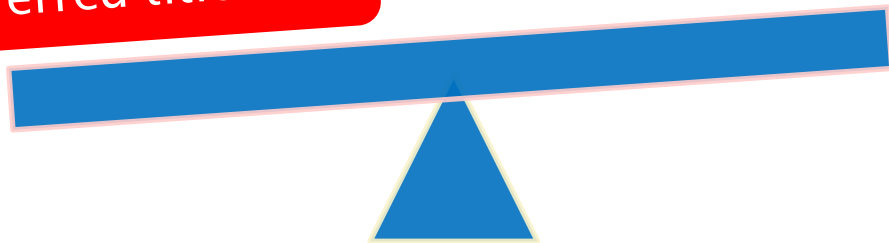
Commercial motives - stakeholder needs

Used and unused titles

Acquisitions, mergers, transferred titles

Essential titles only

Based on community's needs + publishers' list price



At the end : to unbundle big deals or not?

- All subscriptions are analysed
- Not a solution for each type (or size) of University
- New way to do business
- Reactions of publishers : from understanding and collaboration to total inflexibility



Results and benefits for UdeM

Savings and negotiations	Collection assessment	Other benefits
<ul style="list-style-type: none">• 10% of our budget, annually• Serials budget : control• Books budget : increase purchase capacity	<ul style="list-style-type: none">• Best Knowledge of community's needs• Powerful analytical tool	<ul style="list-style-type: none">• Community informed, engaged and supportive• Support OA

Results and benefits for the library community

- 1) extend research to more Québec and Canadian universities
- 2) 14,500 views of UdeM's Springer Nature unbundling press release on May 2016
- 3) new bibliometric indicator



Other initiatives

Partnership with Presses de l'Université de Montréal to publish books in OA

Papyrus, institutional repository

Working group on open access

CRKN's Mobilisation tool kit

Support of OA initiatives
ex : *Knowledge Unlatched*

Érudit publishing platform

<http://www.bib.umontreal.ca/collections-nouvelle-ere/>

Communicate and share the project with the community





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Nouvelle ère pour les Collections :

www.bib.umontreal.ca/collections-nouvelle-ere

Final Report of the Working Group on the Journals' Collection :

www.bib.umontreal.ca/a-propos/rapport-gtcp-vf_14-10-2015.pdf