

CALIS Consortium Purchasing of Foreign Databases: A Review and Prospect

Academic Librarian 2: Singing in the Rain
Conference towards Future Possibilities

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Outline

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- The Development of the Consortium
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Background

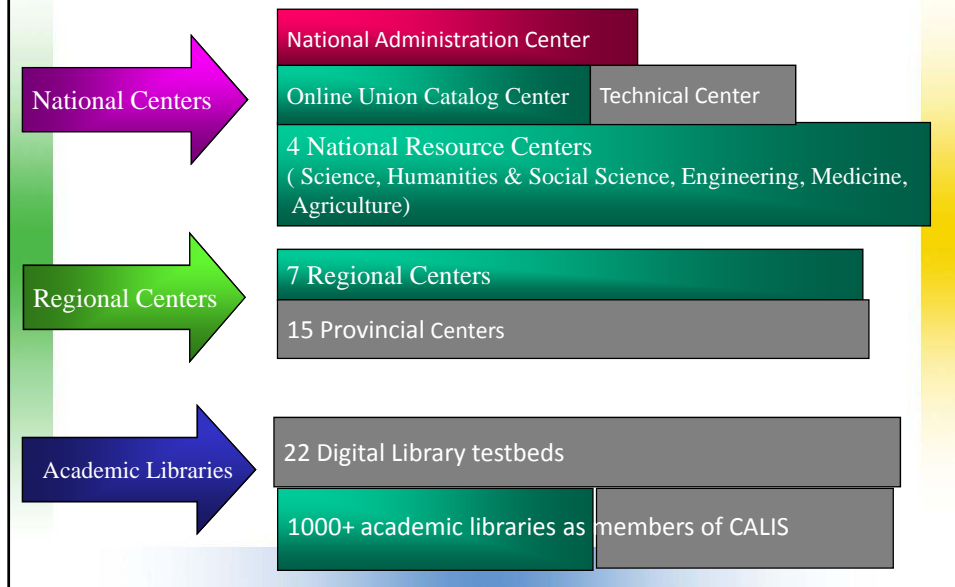
- Some figures about the higher education in China:
 - 2000+ public higher education institutions, half are 2 or 3 years vocational colleges which merely have needs for foreign materials
 - 1000+ private higher education institutions
 - Nearly 30 million FTE students (1.4 M are graduate)
 - Gross enrollment 24.2% so far
- By the year of 2020:
 - Totally 35.5 million FTE
 - Gross enrollment up to 40%

- What's CALIS?

One of the projects of “211 Project”, named as **China Academic Library & Information System**

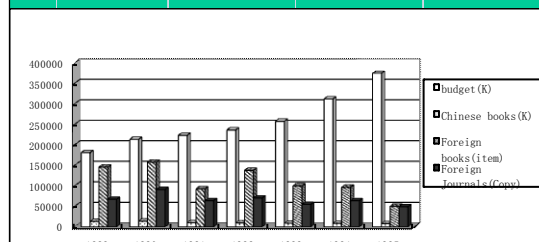
 - One of the three public service systems for higher education (the others are CERNET and CERS)
 - Funded by Chinese government
 - Under the leadership of Ministry of Education
 - Started from 1998
 - A nation-wide academic library consortium

The Organizational Structure of CALIS



Why CALIS? Library budget can't match the increase of the prices.

| year | budget (K) | Chinese books(K) | Foreign books(item) | foreign Journals(Copy) |
|------|------------|------------------|---------------------|------------------------|
| 1989 | 180940 | 13436 | 145650 | 67400 |
| 1990 | 213320 | 13933 | 157570 | 91160 |
| 1991 | 223090 | 9995 | 92480 | 63960 |
| 1992 | 236140 | 9520 | 137690 | 70310 |
| 1993 | 257320 | 8844 | 99940 | 54830 |
| 1994 | 311660 | 8539 | 96540 | 63680 |
| 1995 | 374760 | 7974 | 50250 | 49080 |



The Development of the Consortium

- In 1996, the first online database *FirstSearch* was introduced by TUL
- In 1997, the first networked E-resource *Science Online* was introduced by joint effort
- In 1999, *UnCover* was introduced by CALIS
- After that, TUL and PKUL tried the consortium purchasing with foreign vendors, like *EI Village*, *EBSCO*, etc. CALIS shared parts of the cost.
- Then, more and more “211” universities added in as members.
- Some other libraries, like NSTL, NLC, have also done some cooperation with CALIS.

- There are several options to provide service to members:
 - Setting up one or more mirror servers in either national center or regional center, users access the resource through domestic network to avoid international traffic fees.
 - Rent a pipe from ISPs (e.g. Digital Island), usually by vendors or publishers.
 - Go straightly to the foreign servers through normal Internet.(international traffic fees are paid)

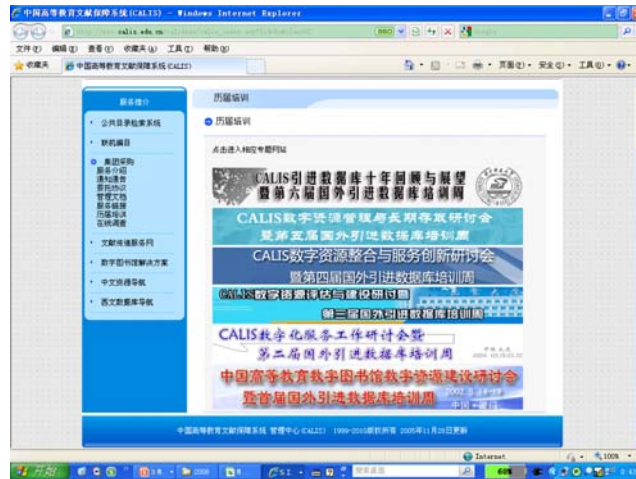
First Reform

- In 2002, a working group for introducing foreign resource was organized under the leadership of Ms. Li Xiaoming, the head of the Office for Teaching Facilities, Bureau of Higher Education, Ministry of Education. Each national or regional center of CALIS sent a delegates as the members, discussing and making decision of the issues raised in the work.
- CALIS had no fund to support the consortium acquisition.

Annual training week

- In the same year, the Annual Training Week for Foreign Databases was firstly organized by the group, with the support of CALIS Administrative Center.
- Each training week has a theme, focused on different issues related to the licensing, maintaining, integration, evaluation and use of E-resources.
- It has been a very successful event and has become a brand of CALIS services. Venders and librarians are keen to participate in the activities. The scale of the conference is larger and larger.

The web page of the annual training week



Second reform

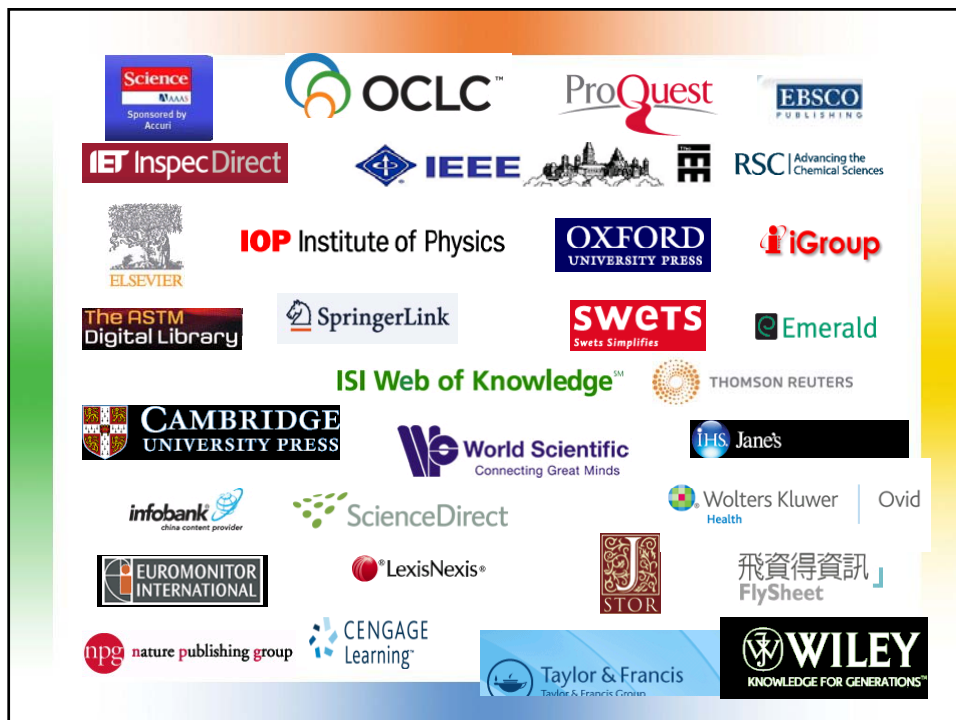
- In 2006, the working group was reformed, according to the instruction of the Bureau of Higher Education. Ms. Li was no longer the head of the group because of the government regulation.
- Main changes are :
 - More centers should take charge of the negotiation
 - For each negotiation, a team which consists of several experts from different libraries should be formed
 - The agreement should be bi-lingual
 - Each member library should sign an certificate of entrustment to CALIS for join the consortium purchasing
 - The final result reached by the team and vender should be checked by the whole group and reported to the bureau.

Benefits and Issues

- The consortium purchasing has greatly benefited **to the academic libraries**:
 - Save a lot of work of negotiation, evaluating and auditing, especially to those mediate and small libraries who lack of skillful and capable staff;
 - In a powerful position to bargain for a better price and service;
 - Greatly improved the capability of library staff through the constant training, and thus greatly improved the use of e-resources.

- Quickly expanded the foreign e-resources (439 databases have been purchased, including 24,000 titles of e-journals, 8,557 titles of proceedings, 145,052 titles and nearly 1.2 millions of e-books as well as thesis and dissertations).
- As a whole, an internationalized information environment has been established.
- More important, users, especially graduate students have got acquaintance with the online resources, being capable to access and use the latest information, greatly improving their information literacy which will benefit their whole life.

- The consortium purchasing has also greatly benefited to **venders and publishers**:
 - Save a lot of cost related to their time, travel, negotiation, communication ... for marketing;
 - Help them to open and expand the market very quickly;
 - Help them to gain feedback more easily, to improve their products and service.
- Obviously, this is a win-win situation for both side.



- However, some issues and problems are still remained:
 - No enough fund to support the consortium activities
 - No budget to share the cost for those poor libraries who also want to purchase e-resources
 - Few of publishers are not flexible in negotiation and we don't have much to do with them
 - Within the consortium there are different requirements raised by members, it's difficult to meet all their needs
 - Sometime not all the members follow the rules and act together

Look forward

- Probably the biggest problem is, according to the government regulation, CALIS is no longer allowed to directly negotiate with foreign venders or publishers. All the negotiation should go with the agents—domestic import and export book companies.
- Thus, we are facing the third reform.

- Last December, the working group held an expanded meeting with some extra delegates. We reviewed our work, analyzed the situation, and discussed the solution. A common sense has been reached that we should change our method and introduce some sort of new mechanism. However, the final solution remains to be done.

- Certainly there will be more than one solution or result—good and bad, or not too bad, but we should pursue the best.
- No matter how the result is, I believe, along with the fast economic growth, the e-resource market in Chinese academic libraries will be expanded, and we librarians will try our best to make our money more cost-effective.



Thank you!