JISC collections
delivering resources online

UK federated access management experience

Mark Williams

Introduction
はじめに

- About UK and JISC and JISC Collections
- Overview & brief history of Federated Access Management (FAM)
- How FAM works in UK – Who does what
- How we have made it work
- Challenges of the future about FAM

About JISC
JISCについて

- Funding: Top sliced, all of the UK University and College funding bodies
- Mission: Provide world-class leadership in the innovative use of Information and Communications Technology to support education and research.
- Method:
  - Infrastructure – JISC National Data Centres
  - Services – JISC Collections, JISC Legal, Plagiarism Advisory Service, Regional Support Centres
  - Leadership – Advocacy on issues such as Open Access, Intellectual Property, Access management
- 8 strategic themes – Network, Access Management, Information Environment, e-Resources, e-Learning, e-Research, e-Administration, Business and Community Engagement
- 120 million dollars – 40% on JANET network

About JISC Collections
JISC Collectionについて

- Established as a mutual trading company in 2006
  - Members include all UK HE, FE and Research Councils
- National centre for the licensing and procurement of digital content to support education and research
- Mission: **To negotiate affordable agreements for relevant digital content under licensing terms that maximise adoption and use**
- In 2009, savings to the JISC community from JISC Collections activities are estimated at £43 million

About JISC
JISCについて

- Aims -
  - Save time and money through **central licensing** and negotiation that leverages buying power and avoiding duplication of effort
  - Widen accessibility to online content through **best value pricing** of subscription resources and the **central procurement** of content
  - **Help institutions manage the demands of licensing** and develop capacity within the sector to improve licence management

How does JISC Collections support that mission?

NESLi2

NESLi2 SMP

For small and medium sized publishers

JISC collections

delivering resources online

- **National Academic Archive**
  - Free in perpetuity
- **NESLi2 – Large publishers**
  - 40 E-journal agreements, Elsevier, Springer, Nature etc
- **NESLi2 SMP – Small and Medium Sized Publishers**
  - 16 agreements and growing
- Over **90 agreements** for online databases, reference materials, multimedia resources and e-book collections
- **Manage 7000 subscriptions**

JISC Model Licence

- JISC model licences since mid-1990s
  - Used with all JISC Collections and NESLi2 agreements
  - Allows institutions and their users to get the best value from resources through flexible terms of use that offer stability and security to both users and providers
- The JISC Model licence is updated annually to take account of changes in:
  - The business, scholarly environment and information environment
- Aim is licensing developed by the education sector for the education sector with terms that allow the education sector to get on with the business of education

What is the model licence?

- There are different versions of the model licence dependent on format
  - NESLi2 model licence for e-journals
  - Datasets – most commonly used for A&I/Bibliographic databases, full text databases, reference works, image collections etc
  - E-books
  - Film and sound
- There are different versions of the model licence dependent on licensing arrangements
  - Contract and Licence
  - Licence and Sub-licence
- There are different versions of the model licence dependent on licensing model
  - Subscription
  - In perpetuity

What is the model licence?

- The model licence is the ideal that JISC Collections starts with – but it is a model and there are almost always modifications
- Always check the final licence
- Increasingly there is consensus about the terms of the model licence for permissions and restrictions
- Increasingly discussions focus on areas such as:
  - Inclusion of content in virtual learning environments
  - **Post termination access**
  - **New definitions for authorised users**
- In time consensus will emerge on these as well

JISC Collections

Some facts and figures

- We delivered over **£25million** in annual efficiency gains in 2008/09

- We delivered **£8.7 million** in annual efficiency gains through the **NESLi2** and **NESLi2 SMP** programmes
- There are **no price increases for 70% of renewals** we negotiated in 2008/2009
- We negotiated **annual opt out** clauses for all renewals and new agreements
- We started with the year 2007/2008 and are pleased to report that most collections are **being well used**. For example, between September 2007 and August 2008, over 2million articles were downloaded from the Oxford Journals Archive. An average price per download is 58p

But it is not all perfect

- Procurement of licensed content from monopolies is tough ~ especially when we cannot cancel ~ the **30% who did not agree to 0% increase are the largest of the publishers**, and those with content that **cannot be substituted**

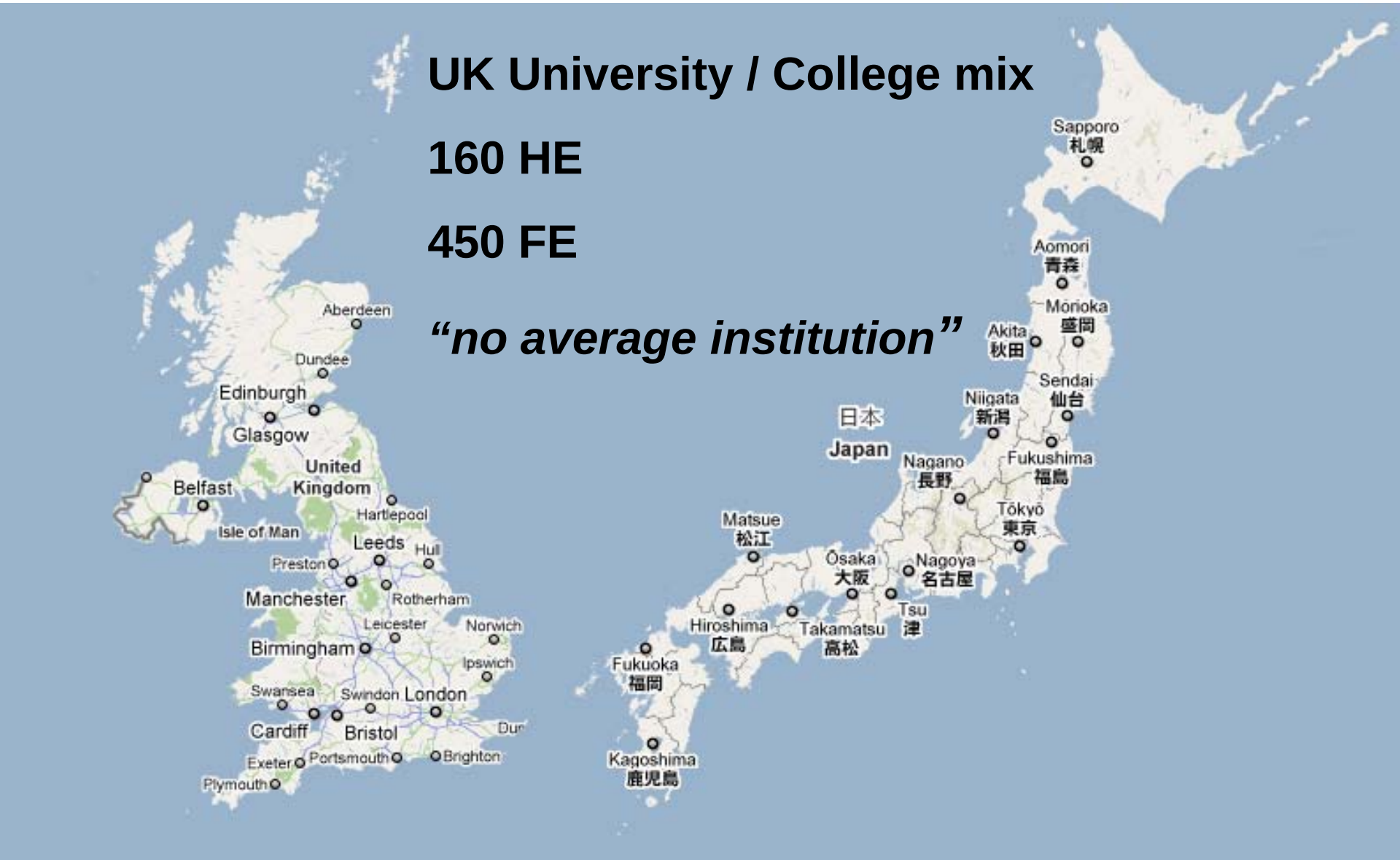
JISC Collections

Not just about licensing and negotiation…

- **Projects and reports that review the current environment and look to meet future requirements of teaching, learning and research**
  - national e-books observatory project informing **publishers too**
  - e-books for FE
  - A comparative study of e-journal archiving solutions
- **Providing tools to support institutional use and acquisition of electronic resources**
  - Academic Database Assessment Tool
- **Supporting licensing requirements of JISC Programmes**
  - JISC Digitisation Programme
  - Copyright Advice and Support Project for Electronic Resources

…though all of these should support licensing and negotiation

JISC Collections



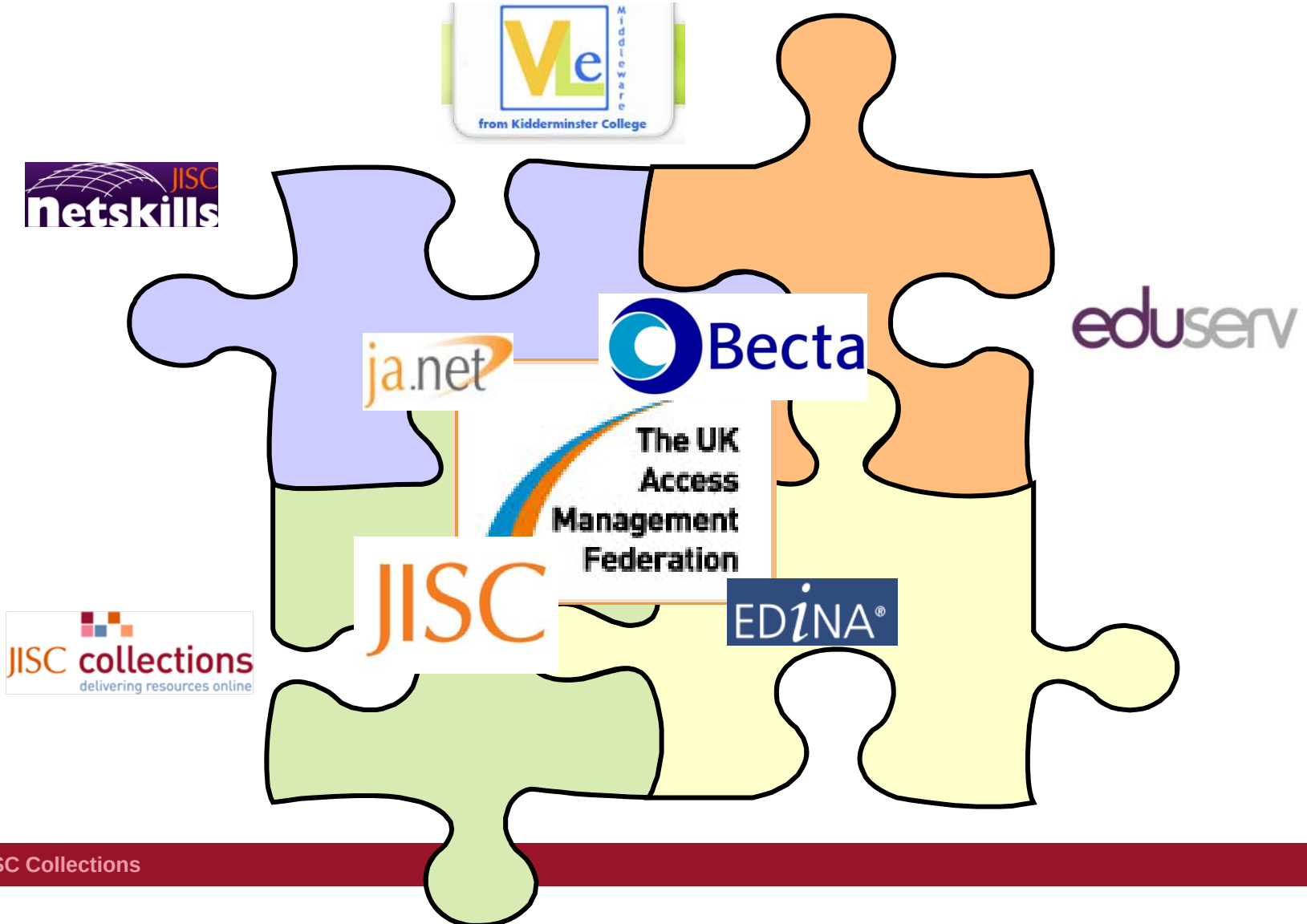
Overview and brief history of FAM
FAM(横断的アクセス管理)の概要と沿革

JISC Collections

- 1996 – 2008: ATHENS
- 2000 – 2002: Requirement for next generation access management system
- 2002 – 2004: Commissioned AAA (Authentication, Authorisation and Accounting) programme to evaluate emerging technologies.
- 2004-2006: ‘Core Middleware: Technology Programme’ launched based on SAML technologies. ‘Core Middleware: Infrastructure Programme’ to build infrastructure.
- 2006 – 2008: Transition to FAM
- 2010: NOW
  - Higher education – 97% of institutions (**162**)
  - Further education – >75% of colleges (**348**)
  - Schools – 50% so far (potentially some **10000** schools)
  - **1000+** Identity and Service Providers
  - Costs: ¥ 100,000,000 JISC and Becta 50% each

How it works
英国における状況

who does what
誰が何をやっているのか



How it works 英国における状況

who does what 誰が何をやっているのか

JISC Collections

- JISC (HE & FE) + Becta (Schools) — FUND
- Ja.net — OPERATE
- EDINA Data Centre — TECH SUPPORT
- JISC AMT — HE / FE SUPPORT
- JISC Collections — PUBLISHER SUPPORT
- Netskills — TRAINING
- Ja.net — CERTIFICATION
- Eduserv — OUTSOURCED IdP / SP
- Cardiff University — IdP INSTALL SERVICE
- OTHER COMMERCIAL ORGS — IdP / SP

Obstacles
障壁

Challenge: ***Moving from an established legacy system to a new model***

Old model = Eduserve Classic Athens

Problem: ***Inertia***

- Password username off campus
- Low Skill required (simple admin)
- Funded by top slice money
- It worked
- Widespread in UK

Obstacles
障壁

Challenge: ***Moving from an established legacy system to a new model***

Problem: ***Issues***

- Shift of work from the library to the IT service
- Costs
- Skills
- Inertia
- Publishers

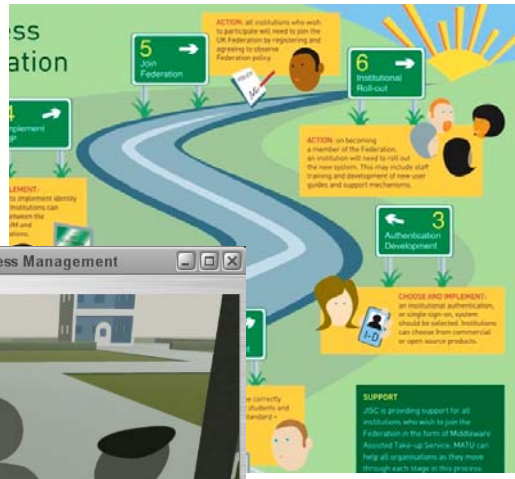
- Culture....Culture....Culture

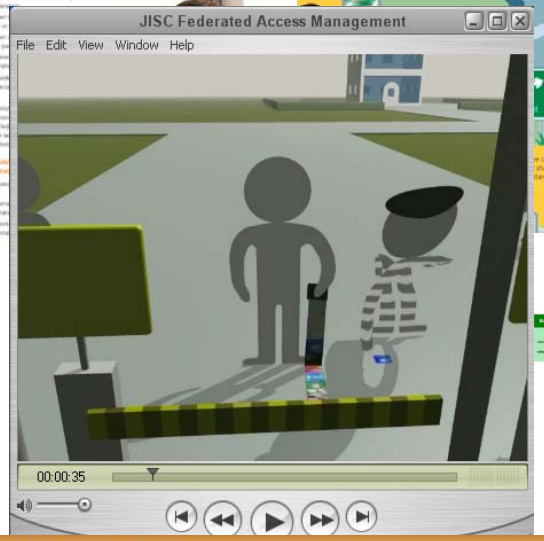
Outreach
アウトリーチ

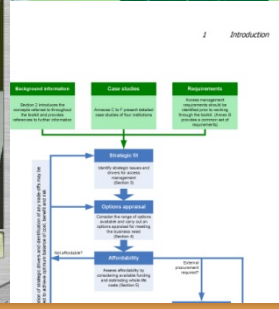
JISC Collections

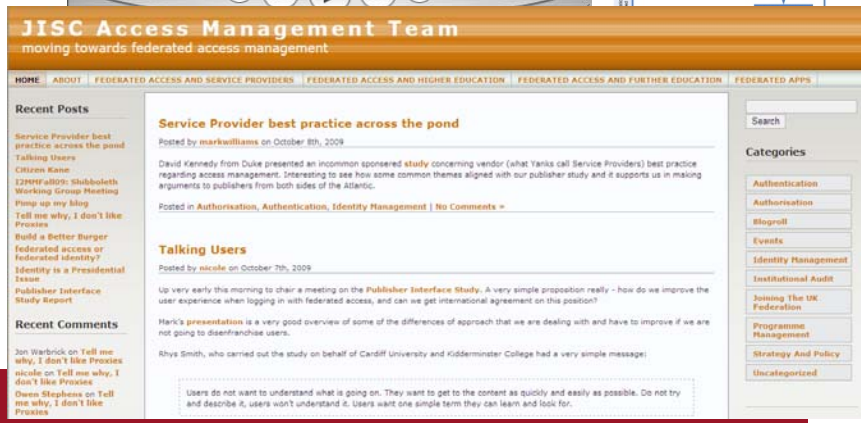
Making the argument

- Briefing papers
- Events, events, events
- Case Studies
- Animation
- Business case tool kit
- Web 2.0 Blogs etc
- JISC Model Licence
- Culture...Culture…Culture









JISC Banding
JISCによる機関区分

Band	HE	FE	3rd party Cost year on year	3rd party install Cost Unique Cost	
A	11	0	¥ 1.26 Mil	¥ 0.5 Mil	
B	11	0	¥ 1.13 Mil	¥ 0.5 Mil	
C	26	1	¥ 1.00 Mil	¥ 0.5 Mil	
D	29	6	¥ 0.86 Mil	¥ 0.5 Mil	
E	30	46	¥ 0.73 Mil	¥ 0.5 Mil	
F	14	89	¥ 0.60 Mil	¥ 0.5 Mil	
G	10	64	¥ 0.46 Mil	¥ 0.5 Mil	
H	11	85	¥ 0.33 Mil	¥ 0.5 Mil	
I	13	106	¥ 0.20 Mil	¥ 0.5 Mil	
J	11	59	¥ 0.10 Mil	¥ 0.5 Mil	

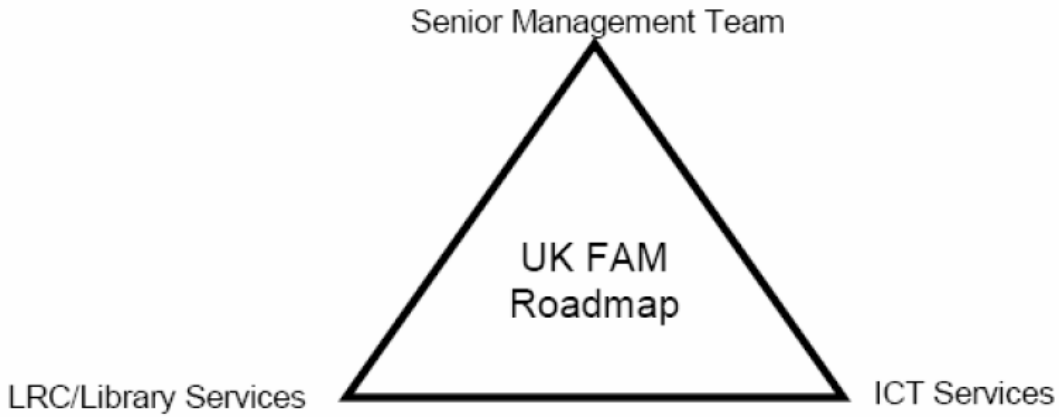
Outreach
アウトリーチ

Helping the change

- Small institution IdP Shibboleth deployment
- Training courses
- RSCs and other agencies
- Mailing lists & communities of support
- JISC Collections **Model Licence**
- Guide to 3rd party support
- Bespoke champions, language and messages
- Surveys – JIBs etc

Shift of work from the library to the IT service

- Change Perception:
- Burden? or Control?
- Resources or College Systems



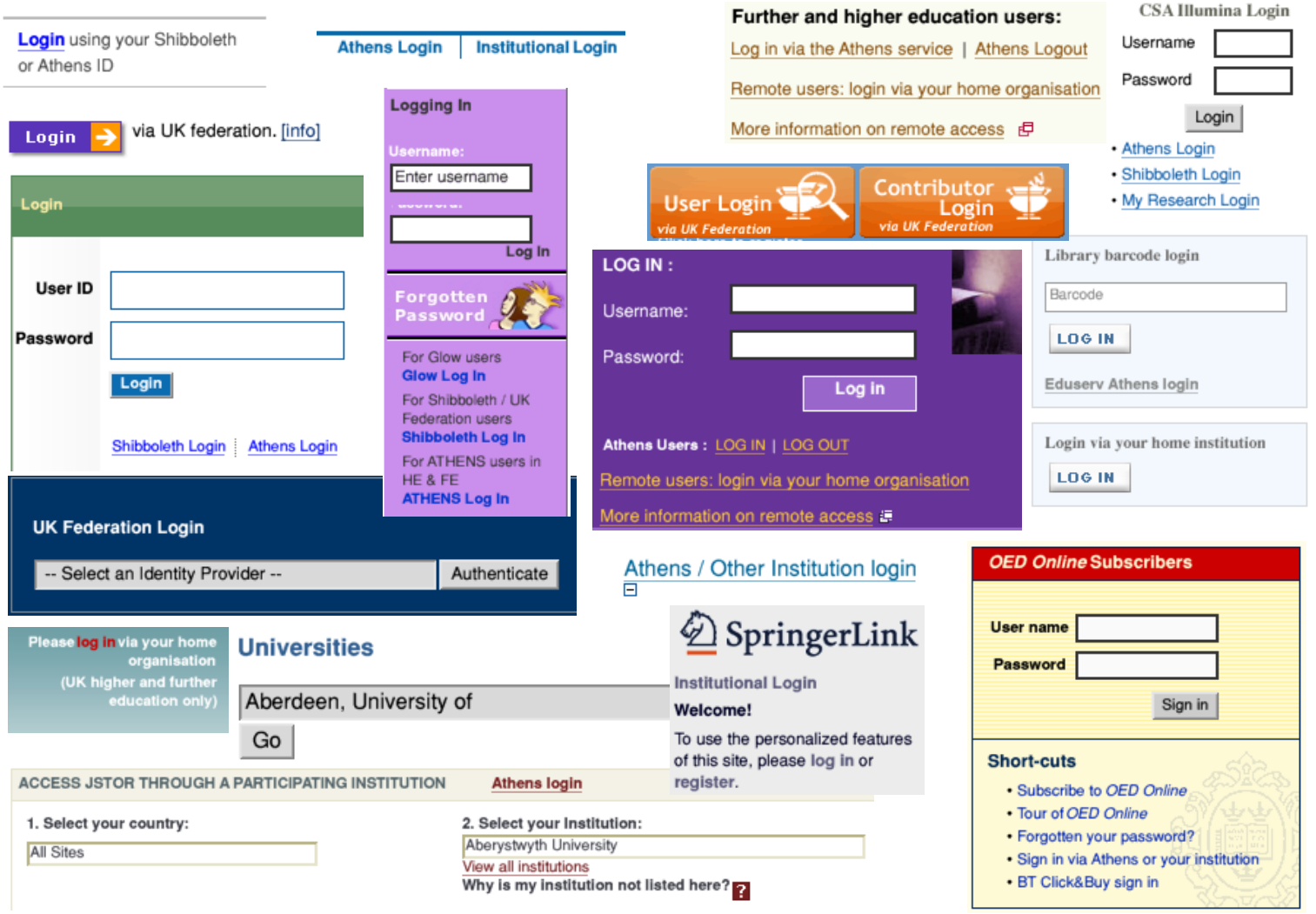
The Knowledge Triangle

Challenges of the future about FAM
FAMにおける今後の取り組み

- User Experience
  - Service Provider Interface Study
- FAM usage – Identity management Toolkit
  - Attributes
  - Walk in users
  - BCE
  - IDM
- Institution as a Service Provider
- Federations
  - Inter-federation
  - Who pays

Discovery and Experience
機関選択の方法、インタフェースの使用感

JISC Collections



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FINAL MESSAGE:

Infrastructure, infrastructure, infrastructure

Useful links all here:

http://tinyurl.com/TOKYOFAM

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http://www.jisc-collections.ac.uk