

Consultation submissions frequently cited concerns over a lack of detail and clarity about the proposal on offer from OCLC. The following questions are taken from the responses we received. Some of them overlap with the FAQs from the end of April but reiterations of previous points alongside answers to additional queries will help to embed and promote agreement with the community.

1. Will OCLC records be shareable with other knowledgebases? (E.g. Ex Libris Community Zone)

There would be no change to current status. ExLibris customers can already share WorldCat records with other WorldCat customers under the terms of OCLC's [fair use](#) policy, as is the case today.

2. How does OCLC intend to support the direction of travel towards a fully open metadata ecosystem?

Product Strategy Director, Axel Kaschte has previously commented as here for the RLUK CSN group:

*“Compared to the current situation, in which there are individual relationships of UK libraries with the OCLC community, a national relationship with OCLC would be a big step forward in addressing the Plan-M identified pain points. It would enable that the Jisc Library Hub – Cataloguing will become the one stop shop for metadata for all NBK members. This not only helps with the re-use of metadata within the UK, but also connects the UK academic community with the global community of OCLC. This avoids duplicated effort of creation of metadata and enables sharing of any later corrections and improvements of the metadata within the global community. i.e. with every OCLC member library.*

*A national relationship with the OCLC community would also maximize the effect of measures which OCLC is undertaking to re-shape the general provisioning of metadata closer to the process of the actual content creation from a global viewpoint. In other words, OCLC continues to create metadata on behalf of content providers (Taylor and Francis, CUP, Wiley, Elsevier etc.) whilst using WorldCat as a metadata distribution channel, which would be extended to Jisc Library Hub – Cataloguing. This means that the rate is growing in which a new title description is already created before it is needed by the first library.*

*In essence, we continue to adjust the OCLC business model and workflows with the new requirements of the Open Access movement – to best meet the value of OCLC to the overall (and evolving linked) metadata landscape.”*

3. Where is the benefit for a smaller library in getting records from OCLC as opposed to using Library Hub Cataloguing or taking out a licence with BDS?

The question seems to imply that these sources are mutually exclusive, which is not the case.

We would suggest that a considerable percentage of what is available through Library Hub: Cataloguing originally came from WorldCat, and a considerable percentage of title descriptions a library could get from BDS are already available in WorldCat.

The main advantage of using WorldCat is the convenience of a one-stop-shop. Without the national WorldCat agreement, the Library Hub Cataloguing would only contain abbreviated

WorldCat records. The national WorldCat agreement would extend this to all UK-HE libraries, to deliver both choice and efficiencies.

Currently, only WorldCat customers can freely make use of WorldCat records.

4. Has consideration been given to what a national agreement might mean for other players in the ecosystem? (e.g. publishers)

WorldCat is a global data network – this national agreement would give a more coherent foundation for accelerating an answer to the question asked. See also our response to Q5.

5. Given that high quality more openly available metadata will drive discovery and sales of products, why are libraries being asked to foot the bill for Plan M and not publishers?

As with Open Content and the quote from Axel Kaschte in Q2, OCLC see a movement in this direction. Jisc could further influence? (certainly, for UK collections that are procured at the national level?).

6. Will being part of a larger agreement mean that the level and quality of services we receive from OCLC in future compare unfavourably with our current experience?

Being part of a larger agreement should see a fuller UK dataset to engage with and simplified workflow options. See also the point made in Q3 regarding access to full WorldCat records to all. Record quality should improve. Service quality will be unaffected.

7. Can OCLC guarantee that existing WMS customers will see a corresponding reduction in their bill to cover the cost of participation in this national agreement?

OCLC have previously committed to ensuring no double-dipping on OCLC expenditures.

8. Where an agreement is in place to release collection metadata as CC0, will OCLC commit to maintaining that arrangement?

A national WorldCat agreement will not change any such arrangement. The OCLC data use policy is asking that the data provided includes the OCN for reference – this does not imply ownership. It is a tool to keep the connection to the other representations of the data intact, as one of the bedrock principles of linked data.

9. Can you provide a document that explicitly lists all the elements and services that will be part of this agreement? Institutions must be confident they are only paying once for any given service. Can a copy of the licence agreement be shared with libraries?

If agreement is reached, OCLC would presume a new licence is drawn up for Jisc review. In terms of elements and services which are part of any agreement to come - the proposal for the [OCLC Cataloguing and Metadata Subscription](#) is based on a combination of what some UK libraries may already know as a) the WorldCat Cataloguing service, and b) the WorldCat Visibility or WorldCat.org service.

10. Can OCLC provide targeted training for libraries to make the most of the services that are on offer?

Yes.

11. How will OCLC recognise the benefit they derive from ingesting UK library data into its global database?

OCLC is a global membership organisation. An expanded UK library data presence in WorldCat benefits all libraries in the same way. By return, the UK libraries benefit from the data provided by other countries that is made accessible and visible through OCLC's global infrastructure.

12. Can we contribute MARC records for eBooks as well as print?

Yes.

13. Can you share details of how libraries that sign up for a national agreement will be able to participate in SEMI and other global OCLC initiatives?

Mindful of our response to Q29 below, this consultation does not impact the ability of UK libraries to participate in SEMI and other global OCLC initiatives on an individual level. Details of the new-for-2022 [linked data](#) output is expected to be shared publicly from January 2022. OCLC will share this information in advance with Jisc – to see whether a nationally co-ordinated approach is sought. (We see logic in a national approach through Jisc.)

14. Will we be able to continue cataloguing directly in OCLC Connexion? Can this be part of the agreement?

Yes, libraries will be able to choose to continue to catalogue (primary or copy) / engage with WorldCat through their preferred tools of choice.

15. We pay a FirstSearch subscription to enable our records to appear in WorldCat. Will this still be needed under a new national agreement?

FirstSearch provides for our most advanced interrogation of WorldCat. In the event of a national WorldCat Participation licence, we would work with the institution affected to ensure no double dipping in terms of expenditure. As with WMS customers and Q7.

16. Will non-HE Libraries be able to upload to WorldCat if they participate in the national agreement?

In principle, yes. Jisc may extend the services to libraries outside the UK-HE sector.

17. How would the national agreement be negotiated over the longer term?

OCLC would prefer a longer-term agreement than the 12-16 month one currently under discussion. We would presume that these longer-term conversations would commence from January 2022.

18. How frequently will the agreement be negotiated and what would happen if negotiations failed in future or institutions dropped out of the agreement?

On the assumption that a long-term agreement is reached, the frequency of re-negotiations should reflect the long-term nature of the overall agreement at the national level.

This may include a rule for institutions wanting to drop out at shorter notice than the overall agreement's duration. Such institution would no longer have the right to use WorldCat services as described in Q9.

If the national agreement were not renewed, no library would have access to the services described in Q9 and the usage rights of the WorldCat data in the NBK would no longer be on

a national level, thus NBK could no longer be used to share records originating from WorldCat.

19. Given the great variety of data sources within WorldCat (including BDS records) can OCLC confirm that libraries will be compliant with national data sharing policies?

Libraries will need to comply with OCLC's [fair use](#) policy, as is the case today.

20. We currently pay book suppliers per record for integration of OCLC MARC records into our automated integrated workflow. Can this be included in the national agreement?

Notwithstanding our replies to Q15 and Q22, WorldShare [Record Manager](#) and WorldShare [Collection Manager](#) instances will be provided at no cost to UKHE sites participating in this national agreement. We are not aware of why book suppliers would charge anew to integrate OCLC records into workflows.

21. Will ebook MARC records from OCLC be included in the national agreement?

Yes.

22. How will OCLC work with 3rd party suppliers in terms of some of the workflows & processes we need? (e.g. we are reliant on the ProQuest / Ex Libris LMS platform and they are commercial competitors to OCLC in some areas)

OCLC already work with the providers noted at an international level. On the back of a newly coherent national licence to WorldCat, we would be happy to review those national relationships and sit around the table with ProQuest, Ex Libris etc. We note again that this infrastructure conversation (and Plan-M goals) is agnostic of LMS.

23. How will OCLC ensure that participants see process improvements and more seamless automation to help offset additional costs?

See responses above and below. One of the biggest advantages of this national WorldCat agreement would be the full re-usability of WorldCat originating records within the NBK, thus enabling convenience and efficiency of this new national Jisc service.

Jisc, RLUK and SCONUL member engagement should lead to further process improvements and ongoing automation. It has led us to Plan-M, for example.

24. What rights will the agreement give to OCLC for commercial re-use of the aggregated data that would then be on their platform? (e.g. for Collection Management activities like Greenglass)

There will be no additional re-use rights of an expanded aggregated data set. WorldCat is a global library catalogue and so benefits accrue to all members in terms of discoverability, collection management and resource sharing. The libraries providing data to WorldCat give the rights for re-usage of this data to all member libraries. WorldCat acts as the facilitated metadata / IT infrastructure making this reusage possible. The OCLC [fair use](#) policy reflects that.

25. What standards should be set out in the agreement to ensure that the quality of data meets sector requirements?

Our members drive the metadata standards. There are many pathways open – including but not limited to the [Program for Cooperative Cataloguing](#) (the PCP – including NACO, SACO, CONSER), [OCLC Research](#), and [OCLC Metadata advisory groups](#). We see UKHE cataloguers as part of the answer to that global question - not just as passive consumers of other members' or publisher output.

26. Would there be a supply of sets of e-book records, perhaps centred on NBK rather than WorldShare collection manager?

NBK based collections (or Jisc negotiated national aggregations) can be configured into or through WorldShare Collection Manager today. How the national platform evolves under the auspices of Plan-M, is something that OCLC presume ongoing dialogue with Jisc around. Infrastructure service provision through WorldCat is the OCLC focus - not the front end or the online point of engagement.

27. What is the annual pricing going forwards and will multi-year deals be available?

See response to Q18. Our presumption at time of this written reply would be inflation, at most. We note that OCLC costs are rising at greater than inflation.

28. Does OCLC enter this agreement as a non-profit making organisation?

Yes.

29. Should the national licence also cover the marketplace for linked data services?

We would like this to be the case and are happy to extend conversation to include the new-for-2022 [linked data](#) enhancements (APIs for example) to come. However, the immediate negotiations should focus on what is available this year.