

# sherif Clarivate PQ Ex-Libris Enhancement Group

26<sup>th</sup> March 2025 14:00 – 15:00 UTC

Microsoft Teams

## 1. Attendees:

Sherif member libraries

- Wendy Mears – Open University (Chair)
- Rachael Scott – University of Reading
- Mas Sore – University of Northampton
- Elie Vicente Tsarouhis – SOAS (minutes)
- Geraldine O’Beirn – Queen’s University Belfast
- Plus a turnout of around 40+ members from various UK HE libraries

Clarivate

- Bar Veinstein – President, Academia & Government
- Jeff Anusbigian - VP Product Management, Books
- Lesley Thomas – VP Product Operations
- Oren Beit-Arie - Senior VP, Strategy & Innovation
- Scott McCarthy – Director Technology
- Stuart Beach – Director of Product Management

## 2. Apologies:

Adam Robinson, Chair, sherif, University of Derby

## 3. Meeting notes

- Wendy began by summarising the recent open letter sent from sherif to Clarivate concerning its announcement of changes to EBook Central services. Appendix 1 to these meeting notes. Also to be discussed if time allowed was the recent clarification letter sent to EBook Central users from the company (appended also as pdf).
- Clarivate were invited to respond to the open letter, with questions raised in the text chat from user libraries. Sherif member libraries were also recommended to continue to use their existing communications channels with Clarivate.
- Bar Veinstein, Jeff Anusbigian and Oren Beit-Arie from Clarivate spoke to the group and clarified doubts and uncertainties.
- Bar apologised for lack of consultation, Clarivate has worked for many years with the library community, and this was the first time it has taken such a decision without informing stakeholders.
- Clarivate is a public company and had to follow compliance regulation regarding these plans before announcing it, it took many people by surprise, including Clarivate staff.
- It had to follow legal team advice and was not able to involve the community in consultation

- Clarivate apologised for the way in which the change was announced and is keen to reassure the user community of continued access to content and how it is using new preservation platforms such as Portico and SAFE to increase preservation options.
- Clarivate is happy to hear from the community and user groups like this for ideas and suggestions on how to move forward and encouraged those present to come forward with their concerns and queries.
- Clarivate reported that year upon year they were seeing reductions in books sales on their platforms, with global trend that libraries are seeing their budgets cut and declines in purchasing. Transitioning away from print to eBooks has become a factor too, ordering books directly from publishers that offer better terms and conditions through their platforms compared to aggregator platforms.
- Therefore, Clarivate decided to phase out the sale of print books and perpetual access to ebooks, so it can now focus on other important issues such as analytics, to help librarians to make informed decisions when purchasing books and developing collections.
- Clarivate will work with more providers, aggregators and materials such textbooks and OER (open educational resources) integration. They are working with Kortext to join Rialto marketplace for example for the first time.
- Clarivate admits they did not fully understand the impact of the changes upon user libraries and regret the manner and timing of the announcement. They were keen to stress that single title purchases on all platforms will now be supported through June 30, 2026, the community can upgrade owned ebook titles licensed with them even after June 30, 2026, and that perpetual access to any purchased Ebook Central titles will remain available indefinitely.
- DDA deposits will still be available as these remain customer funds to use as they see fit. Customers may either spend up, divert remaining funds to other Clarivate commitment, or request a refund.

#### 4. Questions & Answers from the group:

1. How many of your current customers use Alma? We don't so whatever you offer with Rialto is useless to us.

Clarivate is making strong investment in Rialto and Leganto to help workflows and efficiencies. We will work with other vendors as well to integrate with their book and purchasing platforms to help the community transition their acquisitions processes and workflow efficiency.

There are 2,900 Alma institutions worldwide with about 100 in the UK.

2. Can you explain the difference between allowing an upgrade of an existing licence, which is now continuing beyond Summer 26, and buying a new licence? Clearly you still have a relationship with the publisher, so why offer one and not the other? I can change a 1U to 3U, or even unlimited, but I can't buy a new 1U of the same book. It makes no sense.

The title-by-title sale of books was unsustainable for Clarivate, we are no longer selling this model after June 30, 2026.

But the perpetual access to purchased Ebook Central ebooks will remain available indefinitely and you can upgrade licences beyond July 2026.

We enable licence upgrades after consulting with the community. Enabling upgrades is only a small subset of the efforts required to continue the full scope of title-by-title books purchasing.

## Follow up to question 2 How can non-Alma libraries order as they can't get Rialto?

Oasis is an old system with old architecture, since we purchased it from Coutts, ProQuest has struggled with the age of the system, and it has become unsustainable.

Oasis users will need a system switch, and we will work with you to facilitate the migration to your preferred solution. Clarivate is determined to work with users to help them migrate and share those migration kits on their website, please get in touch to work with us to work through migration issues.

### 3. After the 2026 date, will you be charging a hosting fee for e-books on your platforms?

Clarivate will keep all terms related to purchased EBC e-books as it is, nothing is changing, we are going to still implement new developments such as accessibility requirements, new AI research assistant and new EBC Reader App.

### 4. Please can you also expand on the Clarivate collections. We have been informed this is being cut from 300 down to 66. What does this mean if our existing collections are affected?

One of the key goals was to simplify the catalogue going forward as an option for you, but none of the collections you purchased will need to change. We'll make sure content doesn't overlap, we'll make clear that new offers produce value for money, collections will be arranged by discipline and make easier for librarians to see what they have and what gaps exist in their collections. We'll simply reduce the catalogue going forward.

For example Academic Complete collection will stay the same. In addition to simplifications, we also expand our digital collections, and these will consist of journals, news, images, texts, etc.

### 5. How would we hear more about the migration kits?

As we work with other vendors to enhance what systems we go forward with, we'll make sure announcements will be made and information is available about migration kits.

We've met with SCONUL and agreed to establish books advisory committee. As part of that, we will collaborate and create support and migration tools.

Colleagues from this meeting are invited and encouraged to take part in these processes.

### 6. How will the company promote all these resources as staff is very busy until next year with all these changes?

We are placing the right staff at the right place, with some workload automated and simplified, to have a combination of staff and tools.

### 7. Much of the conversation is about e-access, but to clarify on the print book side of things - as you will no longer be selling print books, are you able to share any news on plans/ future of the

warehouses and staff involved in that side of the business in the UK and are you working with other print vendors to step into the gap which will be left in the market?

There is discussion with other vendors of print books to make plans of how we move forward, we are aware that the print book sales in important in the UK.

Clarivate are not yet able to share details of these plans, as conversations with others are still ongoing. Updates will be provided as soon as possible as well as consultation.

**8. Basic question - is the Ebook Central package remaining in its current format to subscribe to?**

Apologies for my lack of knowledge but I am attending today on behalf of a colleague

Yes, existing Ebook Central e-books packages remain the same and we'll carry on investing in the platform and looking after the content.

Wendy closed the meeting at 3 pm UTC. She thanked both Clarivate staff and sherif members for taking the time to have a useful and frank exchange around these changes.

Wendy reminded sherif users that we can make time on the agenda of our regular June product enhancement group meeting for a further discussion of this change. Members will be invited – via the lis-sherif-users jiscmail list - to forward questions or issues and attend the meeting to raise them in person if they wish.

## Appendix 1 – open letter sent by sherif, dated 6 Mar 25.

Lesley Thomas  
Vice President, Product Operations  
ProQuest - Clarivate  
Avon House,  
Headlands Business Park,  
Ringwood BH24 3PB

Date: 06 Mar 2025

Dear Lesley,

In view of Clarivate's recent announcement of radical changes to its ebook products and services, sherif has collated some of our community's concerns. We will not repeat the broad messages already covered so eloquently in the recent [opinion piece](#) in the UKSG newsletter, open letter from SCONUL and UK HE Consortia but we note that they cover similar issues to those raised by our members. We share both SCONUL's and the consortia's desire that Clarivate halts its radical change plan while it considers more carefully the effects upon its user community and seeks to rebuild trust with its customer base. It's worth noting that many members would like Clarivate to continue with some, or even all, of their current book services.

There has been dismay expressed at the planned changes, the speed of their proposed implementation and frankly, even disbelief at the outcomes of any consultation process that the company states has been followed. Indeed there seems to have been no consultation with any UK HE bodies before these changes were announced. Many of our users are frustrated at this unplanned work required to keep their acquisitions processes running and are worried that Clarivate staff won't be able to support this process change within the timeframe.

Perpetual access models are preferred as a way of controlling costs within increasing financial constraints. Not a single sherif library has welcomed the ebook subscription model and none would choose it above perpetual access single title purchase. Perpetual licences provide security of ownership and give libraries important protections, guaranteeing access to core teaching texts, and primary source collections. Subscription models give them no protection over permanent access to key titles, control of costs or the user experience. Academic staff will lose confidence in the library subscription model if continuity of access cannot be guaranteed.

There is fear over control of rising costs, potential escalating hosting fees, and reduced investment in the user experience for those HEIs who choose not to invest in the subscription model. Libraries don't want bundled content, as it reduces intellectual freedom and is financially unsustainable. Indeed, UK

HE institutions have recently very publicly demonstrated a move away from this kind of content in decommitting from the journal big deals.

Many sherif users have expressed frustration at the investment of their own staff time in jointly developing Rialto workflows, only to see those processes rendered inefficient, or in some cases, obsolete. Some libraries have lost staff through process efficiencies, yet will be unable to reinstate these positions needed in newly complicated acquisitions environments. Some sherif libraries are worried about their DDA deposits if not spent up within required timeframes.

We welcome your recent invitation to discuss community concerns and would be happy to use the existing product enhancement group structure to facilitate that.

Wendy Mears, Chair, sherif Clarivate ProQuest ExLibris product enhancement group

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Appendix 2 Clarifying questions about Ebook Central perpetual access pdf also attached.