UKSG

People in the News
Paul Feldman

Dr Paul Feldman was appointed as the new chief executive of Jisc in late 2015, taking the reins from Martyn Harrow. Paul has extensive experience of working at a senior level in large, complex organizations and has a strong commercial background. In the Jisc press release announcing his appointment, he is quoted as saying, 'Now, more than ever, universities and colleges need this kind of body and advice to help them take advantage of the opportunities digital technology offers to transform research, teaching, learning and organizational culture'. With this thought in mind, *Insights* took the opportunity to chat to Paul about his role and his vision for Jisc.

Paul began by looking back briefly over his previous career. 'I'm now the chief executive of Jisc, the UK higher, further education and skills sectors' not-for-profit organization for digital services and solutions. I took up the position in mid-October 2015. Prior to this I was an executive partner at Gartner UK, a technology research and advisory firm … I've spent over 20 years in financial services at Nationwide Building Society, Barclays Bank and First Data EMEA, both in IT and business roles. I've also worked in knowledge-based companies including Thomson Reuters Legal UK and the Intellectual Property Office.'

It seems quite a leap from the private sector to the public sector, so your Editor was keen to ask Paul how he thinks this role differs from his previous experience. He responded, 'While the sector is new to me, I am very familiar with many of our challenges. Our vision is clear to address these challenges: we want to be a world-class powerhouse for digital transformation in UK education and research. To make this a reality we will need to make changes to the way we work, whilst still delivering for our members. We need to look at how we can work more efficiently, offer a range of services that universities (and others) are prepared to subscribe to, in addition to core funded ones, and start branching out to see where our services can offer value in other sectors.' And, when asked what he brings from his commercial background, he added, 'My commercial background is helping with this more entrepreneurial approach'.

> 'we want to be a world-class powerhouse for digital transformation in UK education and research'

The UK higher education sector has undergone many changes over recent years, and Jisc has not been unaffected by those changes. Paul's predecessor, Martyn Harrow, led Jisc through a period of substantial change during his four-year tenure, so Paul was asked what he sees as his major challenges in taking on this key role. He replied, philosophically, 'My role is about taking the next step on the journey and establishing a sustainable business

model – something we've already started to do. Although, I'm under no illusions that we have more work to do to meet our members' expectations.'

'Through our customer services team we are working with universities to provide them with the digital solutions they need, but in order to do that to best effect we need to do much more to really understand our members … Over the coming years I believe the technology that supports our work and our day-to-day lives will become more important. Most governments around the world are already promoting digital first and we want to become a digital partner for our members, helping them to gain the benefits of a digital approach. When our members can unlock the benefits of digital technologies they will more easily be able to meet and exceed the expectations of their students and staff, and create a fertile research environment which will keep the UK competitive. Our objective is to help them do just that.'

This mention of the current research environment led naturally, and somewhat inevitably, to talk of open access (OA). Your Editor was keen to hear what Paul sees as Jisc's role in supporting the transition to a fully OA world. He was very clear in his response. 'We believe that all published academic research should be made openly available. OA can contribute to raising the quality of research by allowing new research to build more easily on prior findings, and improve research integrity by opening it up to a wider realm of scrutiny. The opening up of UK research also gives greater access, making the research process faster and global collaboration easier.'

He continued, 'Our members tell us that there are serious problems with the current research journals publishing market. We see that we can make a difference with them and for them by influencing faster and more effective publishing routes to OA and through making the journals market as transparent as possible. We are undertaking a lot of work in this area. For example, using our experience in running services and projects with universities and funders already implementing OA, we input into policy discussions as part of the Open Access Co-ordination Group, run by UUK. Ultimately, we're aiming to make OA easier and less costly to implement.'

On a practical level, Jisc is participating in the **PASTEUR4OA** project, which aims to bring 38 European countries together to pool their expertise on OA, promote and share best practice, and support policy aligning at an EU level.

OA will, of course, form a key element of the future scholarly landscape, but it is not the only challenge. The funding councils, through which Jisc receives a significant part of its funding, are being overhauled, so Paul was asked how he would like Jisc to adapt to this change. He replied, 'The funding cuts facing higher education mean that universities will need to work more efficiently in the future. I know this is something we can support them to do through the power of digital technology, but in reality it is something we also need to do as an organization as we may face similar cuts.'

He continued, pragmatically, 'The change to our funding model has been the first step on this road and since then we have been looking at ways to ensure our sustainability. We are looking at all the services we provide to establish whether they add sufficient value to our members, but also to see if there are opportunities to raise income in new ways (and from new sources). We already actually receive more 'optional' income from services and other sources than we do via subscriptions.'

A core manifestation of this ethos has been the setting up in September 2014 of a commercial arm of Jisc, Jiscom. Paul explained that this body is '… looking for commercial partners who are willing to pay for Jisc services from outside of education and research. These funds are then used to develop and provide digital solutions and services for education and research.

'We have also recently set up **a collaborative partnership** with the Quality Assurance Agency and the Higher Education Statistics Agency, called the M5 group. Through this group we will look to achieve operational efficiencies and there may also be opportunities to develop better, more efficient solutions to some of the long-term issues that are being faced by the UK universities.'

'So, as you can see, we are not unprepared for any future changes to the funding councils and we are already adapting to ensure we can continue to provide tech for education and research which will keep the UK as a world leader.'

> 'we are not unprepared for any future changes to the funding councils'

With challenges like this ahead, it is no surprise that Paul likes to take time out to relax. 'My main pastimes are golf and mountain biking', though he admits that 'finding time to do both is challenging! We're empty nesters, so we do a lot of walking, films and concerts together. I also always have a book on my iPad Kindle app (usually some form of foreign crime fiction – the prose version of the middle-class obsession with the 9pm Saturday BBC4 slot).'

Moving on to talk about the role and funding of Jisc, Paul was very clear, saying proudly, 'We are doing a huge amount of work on behalf of the community – our negotiations actually account for agreements covering over 40% of all expenditure on e-resources by the UK academic library community'.

He went on to explain, 'Through Jisc Collections we support institutions, libraries, researchers and students with negotiated agreements that widen access to content at the best possible price and on the best conditions. This constrains the costs and overall financial burden for universities associated with subscriptions to books, journals and databases as well as OA, not to mention the administration and legal work that go alongside such agreements...', before adding, 'We are uniquely positioned to negotiate sector-wide deals on behalf of UK higher education, but also enable some of the more challenging conversations that need to take place about efficiencies, infrastructure, financial flows, international dimensions and market structure, and work very closely with the academic community to make sure their views are heard.'

Paul is very realistic when it comes to the challenges that lie ahead. 'One area where we have been focusing our efforts is in reducing the estimated £192 million per year paid by universities for subscriptions and open access to journals through our total cost of ownership work. A good example of the impact this type of agreement can have can be seen through the Springer Compact agreement, which moves from subscriptions payments to an annual fee that covers payment for OA publishing and subscription. In the first three months more articles have been published as gold OA than during the whole of 2014 and the number of articles made OA is rising every month.'

However, it is not just about journals. Paul continued, 'We're also working on issues surrounding the cost of e-textbooks and we have been mandated by the sector to undertake negotiations with Pearson on their behalf. In response to the recent changes to the Pearson model, we worked closely with SCONUL, RLUK and institutions to set out the requirements of the sector. Pearson responded immediately with a fivefold discount on its pricing in 2015, but we are now negotiating to put in place new models that meet the needs of academic institutions more fully.'

When asked about funding for all this activity, Paul replied, 'As for whether this work is adequately resourced, I believe we have our priorities in the right order. The work of our Jisc Collections team provides one of the largest financial benefits we offer to UK education and we certainly recognize this, invest in it and resource it to make sure it is functioning as efficiently and as effectively as possible.'

> 'I believe we have our priorities in the right order'

Your Editor asked Paul whether a move from a 'top-slice' funding model to an institutional subscription model will have a substantial impact on Jisc's work. He replied, 'The majority

of our income is still made up of funding from the four UK governments, with subscriptions only accounting for 10-15% of our income. This in itself is a defence and a testament to the value governments place on the teaching and research work we do. We offer a network and selection of services that no other organization provides and, although for the past two years the model change has been mandatory, there is no reason a change to voluntary subscription will cause fragmentation.' He went on to qualify this by saying, 'If anything, I think the change in subscription model has allowed us to become more focused and make sure that the services and advice we offer are at the top of our members' wish lists. Our members tell us that they appreciate that the offer we provide for them is world-class and tailor-made to meet their needs. At the same time, there is no room for complacency and we must constantly make the case for the value we bring.'

'we must constantly make the case for the value we bring'

Jisc recently called for providers to take on the service for making digital media available to the UK community, and this seemed to typify Jisc's new approach. Paul was keen to explain that 'We have a lot of work going on in this area. Over the last ten years we've been able to purchase digital archives such as **Early English Books Online**, and **fund large-scale digitization** to allow access to digital resources. We have also been collaborating with publishers to increase accessibility to new collections. For example, the Adam Matthew's '**Migration to New Worlds**' collection is now available for free to the Jisc community but also 10% of content and all metadata are openly available in the UK.'

Paul went on to explain, 'Now, in a tougher economic climate, we're investigating new models which will still enable universities to access content in efficient ways but without necessarily relying on large purchases by Jisc … We've started informal consultation with a number of librarians. One of the initiatives we're considering is for us to co-ordinate collaborative purchases – where all or some universities want a collection we'll negotiate a deal on their behalf, bringing them together to ultimately 'crowdfund' the funding for the collection.

'Librarians have told us they're interested in experimenting more with evidence-based acquisition models for digital archival collections. This means that universities could use their usage data to see what is most needed and then make more informed purchasing decisions. There is also a need for better facilitating and co-ordinating information on what collections are available from different publishers. This currently takes librarians a lot of time to identify, so there is scope to make the process more efficient.'

'Lastly, another area worth mentioning is the innovative ways you can use digital collections. As research is changing and becoming more data driven, we want to enable scholars to engage with the content in more interesting ways by using tools to interrogate digital collections at scale. We've been working in partnership with the Wellcome Library to digitize 15 million pages of 19th-century medical books and developing visualization tools to help users discover and navigate such large amounts of content in meaningful ways.'

In bringing the interview towards its inevitable conclusion, your Editor asked about the many discovery resources (such as SUNCAT, Copac, and Archives Hub) that Jisc currently offers. Does Paul have any plans to consolidate these to make a 'UK-cat'? He responded enthusiastically, 'We have plans well under way to create a National Bibliographic Knowledgebase which eventually could provide such a function for libraries …', before going on to add, 'Our Copac service, which already acts as a consolidated catalogue for around 90 UK and Irish libraries, would provide a significant proportion of the data but we are looking to grow this in collaboration with an external service provider to bring together data from as many academic libraries in the UK as possible. Alongside this we would look to include additional specialist collections such as national museums and other research organizations.

'One of the principal goals of the new system would be to enable more effective digital access, in particular to e-books. Ultimately this service would not only provide users with access to resources wherever they are in the world, but also provide libraries with the information they need to monitor and manage their print and digital collections in more efficient ways.'

> 'a truly national system of this nature should help to align metadata practices and help improve metadata quality'

'Last and certainly not least, a truly national system of this nature should help to align metadata practices and help improve metadata quality. This alone could open up a wealth of opportunities. It could help to create richer links between entities such as people, places, organizations and resources and provide clearer and easier access to data whilst supporting new types of research. There should also be opportunities to link to different versions of publications including new dynamic formats of OA books held within institutional repositories. The possibilities are endless.'

> 'The possibilities are endless'

And that seemed an appropriate time to thank Paul for his time and close the interview on a very positive note.

Abbreviations and Acronyms

A list of the abbreviations and acronyms used in this and other *Insight*s articles can be accessed here – click on the URL below and then select the 'Abbreviations and Acronyms' link at the top of the page it directs you to: **http://www.uksg.org/publications#aa**

Steve Sharp

Co-Editor, *Insights*
E-mail: s.l.sharp@leeds.ac.uk

ORCID ID: http://orcid.org/0000-0002-4088-167x