

## EIR selection methodology, version 4

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### Introduction

The EIR support share is definitively set at 70% for citation and metric tools. Support is set at 50% for other EIRs.

### Principle:

EIRs are sorted in descending order according to the number of votes, while the threshold (min. number of votes for a given EIR) is set to ensure subsidy for a selected EIR (i.e. with this or a higher number of votes) does not fall below 50%. A decrease in subsidy below 50% is only possible in the event of a significant change to the exchange rate of the Czech crown against foreign currencies or a significant change in the VAT rate.

### Definitions:

**EIR** means an electronic information source approved by the Expert Council as a resource for support of science and research.

**CM EIR** means “citation and metric EIR”, i.e. the Web of Science and Scopus citation databases and the InCites and SciVal add-on tools.

For simplicity, **all EIRs** that do not fall within the CM EIR category are referred to as other EIRs.

**EIR support** means financial support for the acquisition of EIRs distributed via CzechELib.

**The total EIR price in CZK with/without VAT** is the amount paid to the publisher/supplier (the “Provider”) for the given EIR for the entire consortium.

The total EIR price is calculated as follows: (total price in the original currency) x (exchange rate) x (1 + VAT). For an approximate figure, the “CNB FX sell” exchange rate on 4/1/2021 increased by a 5% provision is used. The VAT rate is 10% or 21% depending on the characteristics of the EIR.

**The EIR subsidy share is:** (EIR subsidy in the original currency) / (total EIR price in the original currency).

The list of other EIRs is a list of EIRs which CM EIRs excluded.

**Support for other EIRs** is the total support for EIR reduced by the amount for CM EIR support (70% of their price).

**PI** means a participating institution - an institution that has expressed an interest in participating in CzechELib and that is taking the necessary steps to join the selected consortium.



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**MI** means a member institution - an institution that has concluded an Agreement on central purchase with the NTK (National Library of Technology), followed by an Agreement on the Provision and Access to Electronic Information Resources.

**Access to EIR** means institutional access to EIR (IP ranges; authentication via Shibboleth, where authorization is granted on the basis of affiliation). The possibility of remote access for users from other institutions based on an individual registration **is not considered** to be access to EIR.

**The number of PI votes** means the number of institutions that voted for a given EIR. If an institution secures **access to EIR** for multiple legal persons, its vote for this EIR is equal to the number of these institutions (note: this practically applies only to selected cases for the Library of the Czech Academy of Sciences and for the Institute of Physiology of the Czech Academy of Sciences) and each of these cases must be explicitly approved by the CzechELib Expert Council.

### Selection procedure

The threshold will be set based on the requirements of the institutions and the allocated support for 2021. The settings that result from the selection will also be applied in the following years unless the rules would be changed by the recommendation of the Expert Council and approved by the Steering Committee.

The following procedure will be applied to each additional EIR proposed by a MI/PI or offered by the Provider:

Basic conditions:

1. CzechELib only supports a resource for which 3<sup>1</sup> or more CI/PI show a binding interest (3+ criterion).
2. Subsidy for a specific EIR may drop, but only to 50% (the target set in the Project Charter).

Selection procedure:

1. Preliminary pricing of the proposed EIRs takes place.
2. The EIRs are sorted according to the number of MI/PI votes in descending order. All EIRs are considered equal in a group with the same number of votes.
3. The total EIRs prices in CZK with/without VAT will gradually be added up starting from the EIRs with the highest number of votes. A group with the same number of votes is added as a whole.
4. In each step, the EIR subsidy is calculated from the current total price calculated in step 3.
5. If the addition of a group reduces the support below 50%, the whole group and all groups with a smaller number of votes will drop out of the selection for the given period. At the same time, the N vote limit is set as the number of votes for an EIR in the group that is the last with entitlement for subsidy.




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<sup>1</sup> Exceptions must be discussed at the EC level and recommended by the SC, which must approve them.

