



# Research Libraries - A global system A shared future

James Michalko

Vice President, OCLC Research

RLUK Meeting, Edinburgh

12 November 2010

With thanks to OCLC colleagues Lorcan Dempsey and Constance Malpas

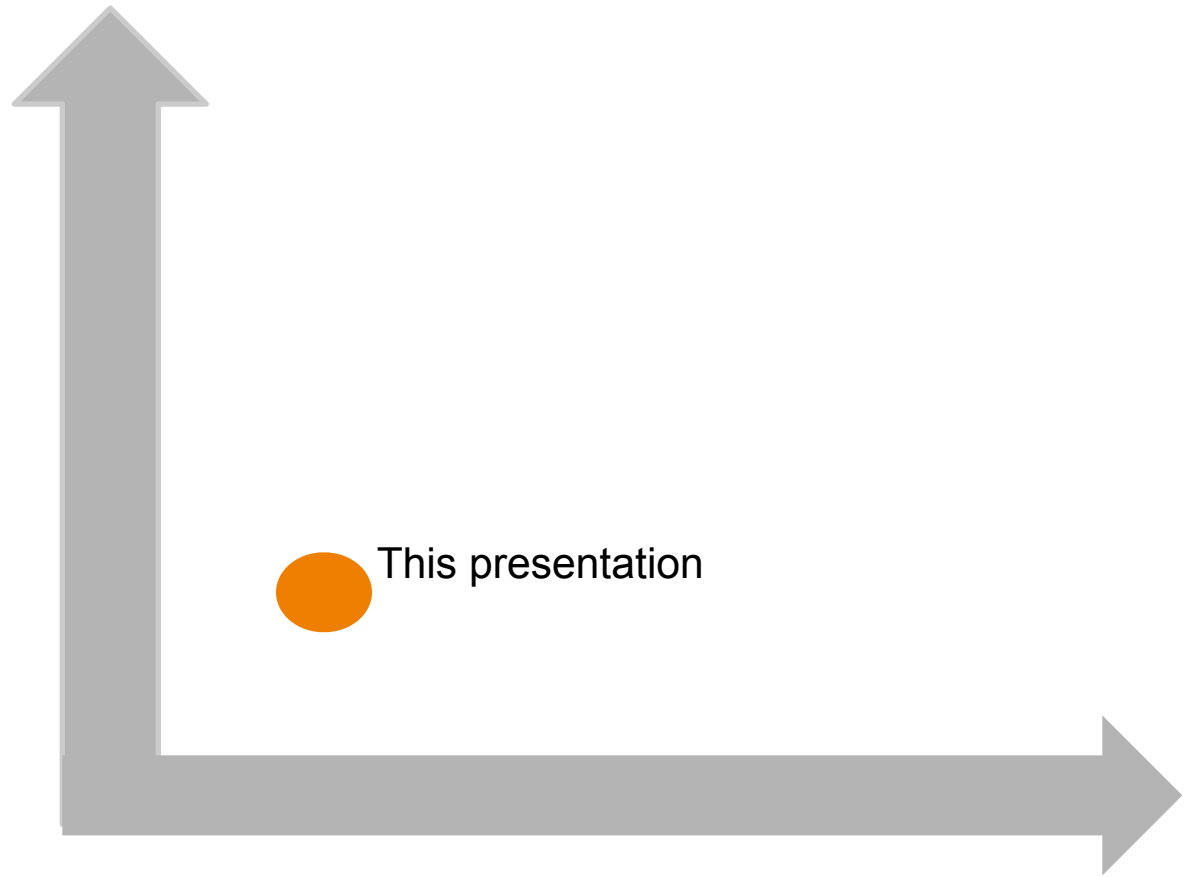
# Two words

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"Stressfully  
heartening"

# Disclaimer

**Simplistic**



**Content**

- Time is short.
- Perspective is research libraries
- All examples are U.S.A perspective

# Stipulated

- The network has reconfigured whole industries
  - Travel, News, Book Retailing
- The network is now the first option for researchers and learners
- Don't yet know how it will reconfigure the University
- The library is a service unit whose success is tied to its impact on the university's mission and goals
- The network has already impacted the university library
  - changed the value of physical book collections and library space
  - changed the relevance of the library assets and services to the University's outputs

What it will mean to reconfigure the library within the University?

# the stage set - Diamond (Cannell)

- Library as central service for University goals
  - Needs of students and researchers control
  - Sharing of services dictated
  - Availability in 21<sup>st</sup> century timetables expected
- Provide books wherever desk happens to be
- Journals - licensing and open access
- Special Collections - digital and physical
- Grey literature - critical and needs shared service
- Data - specialist area that needs shared service and expertise

# the stage set - Sykes

- Cost cutting or greater investment?
  - cut what? from where?
- Work together to achieve efficiency and effectiveness
  - Shared Services
  - Benchmarking
- Stay the same
  - Preservation
    - of what?
  - Special Collections
  - Equity of access

# OCLC Research

<b>Research Information Management (RIM)</b>
Role of Libraries in Data Curation
Support for Research Workflows
Supporting Research Dissemination
<b>Mobilizing Unique Materials</b>
Introduce Balance in Rights Management
Library, Archive and Museum Collaboration
Rapid Capture: Mass Digitization of Special Collections
Sharing Special Collections
Single Search for Library, Archive and Museum Collections
Streamlining Photography and Scanning
Survey on Special Collections and Archives
<b>Metadata Support &amp; Management</b>
FAST (Faceted Application of Subject Terminology)
MapFAST
Metadata Schema Transformation Services
Name Extraction
Sharing and Aggregating Social Metadata
WorldCat Genres
<b>Infrastructure &amp; Standards Support</b>
PREMIS Maintenance Activity and Editorial Committee
SRW/U
<b>System-wide Organization</b>
Deaccession Materials Held in Print and Electronic Form
Define Policy and Infrastructure Requirements for Shared Print
<b>User Behavior Studies &amp; Synthesis</b>
Seeking Synchronicity: Evaluating Virtual Reference Services

DEFINE FUTURE RESEARCH  
LIBRARY SERVICES -  
REVITALIZE OUR VALUE  
PROPOSITION

TRANSFORM OUR CURRENT  
OPERATING PRACTICES  
AND PROCESSES -  
IMPLEMENT SYSTEM  
CHANGE

# Reconfiguration

## Dictated

- by change in academic print collections
- accelerated by fiscal exigencies

## Impact bounded by

- what gets done where
- mutual changes in traditional processes and practices
- overt reliance on shared structures and services

# Academic Collections

## Disclaimer

- Based on USA - the forecast here may be very different

# Change in Academic Collections

- Shift to licensed electronic content is accelerating
  - Research journals - a well established trend
  - Scholarly monographs - in progress
- Print collections delivering less (and less) value at great (and growing) cost
  - Est. \$4.25 US per volume per year for on-site collections
  - Library purchasing power decreasing as per-unit cost rises
- Special collections marginal to educational mandate at many institutions

# An Equal and Opposite Reaction

**As an increasing share of library spending is directed toward licensed content . . .**

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Fewer institutions to uphold preservation mandate

Stewardship roles must be reassessed

Shared service requirements will change

# What's driving this change?

## Erosion of library value proposition in the academic sector

*institutional reputation no longer determined (or even substantially influenced) by scope, scale of local print collection*

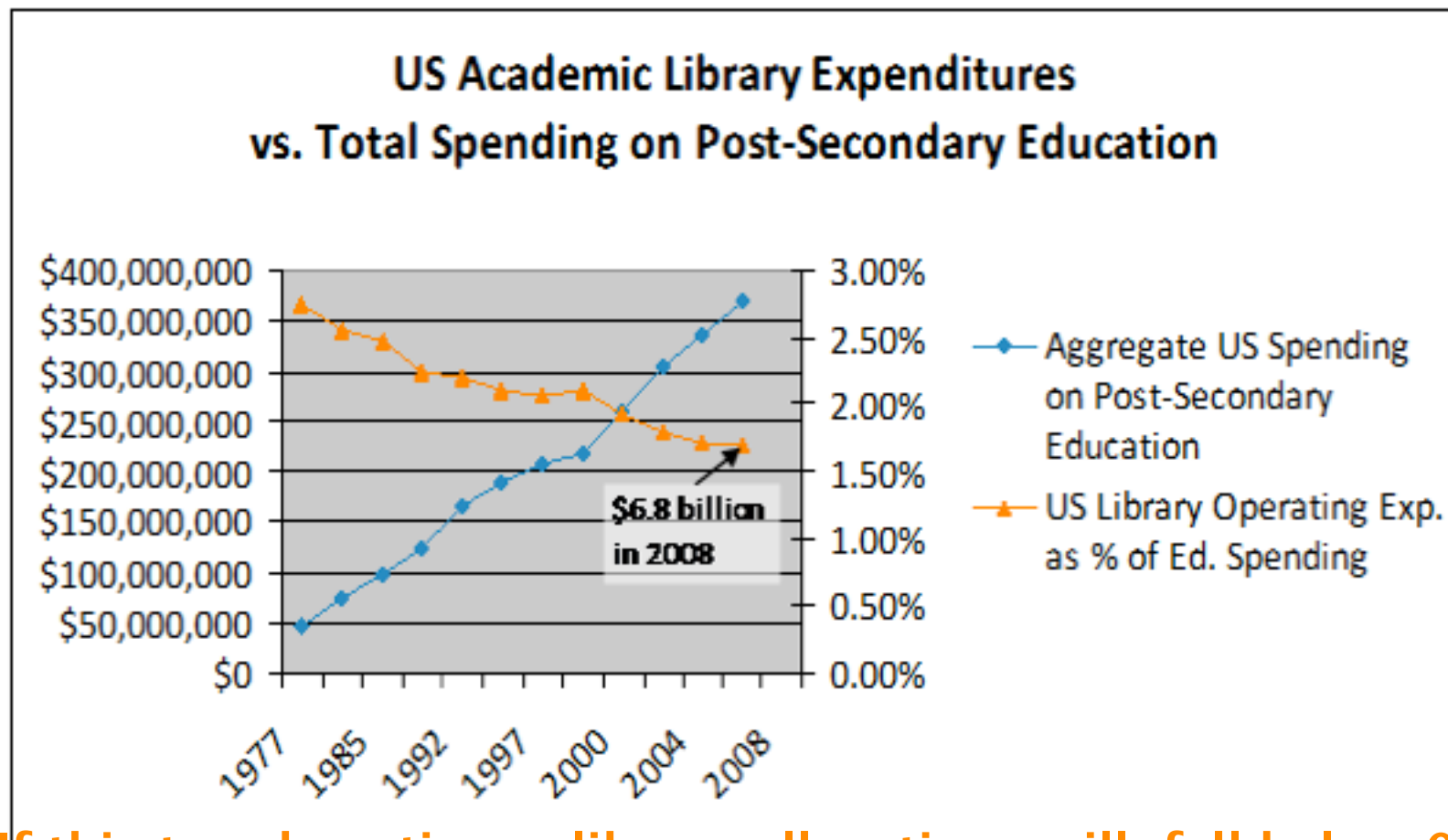
## Changing nature of scholarly record

*research, teaching and learning embedded in larger social and technological networks; new set of curation challenges for libraries*

## Format transition; mass digitisation of legacy print

*Web-scale discoverability has fundamentally changed research*

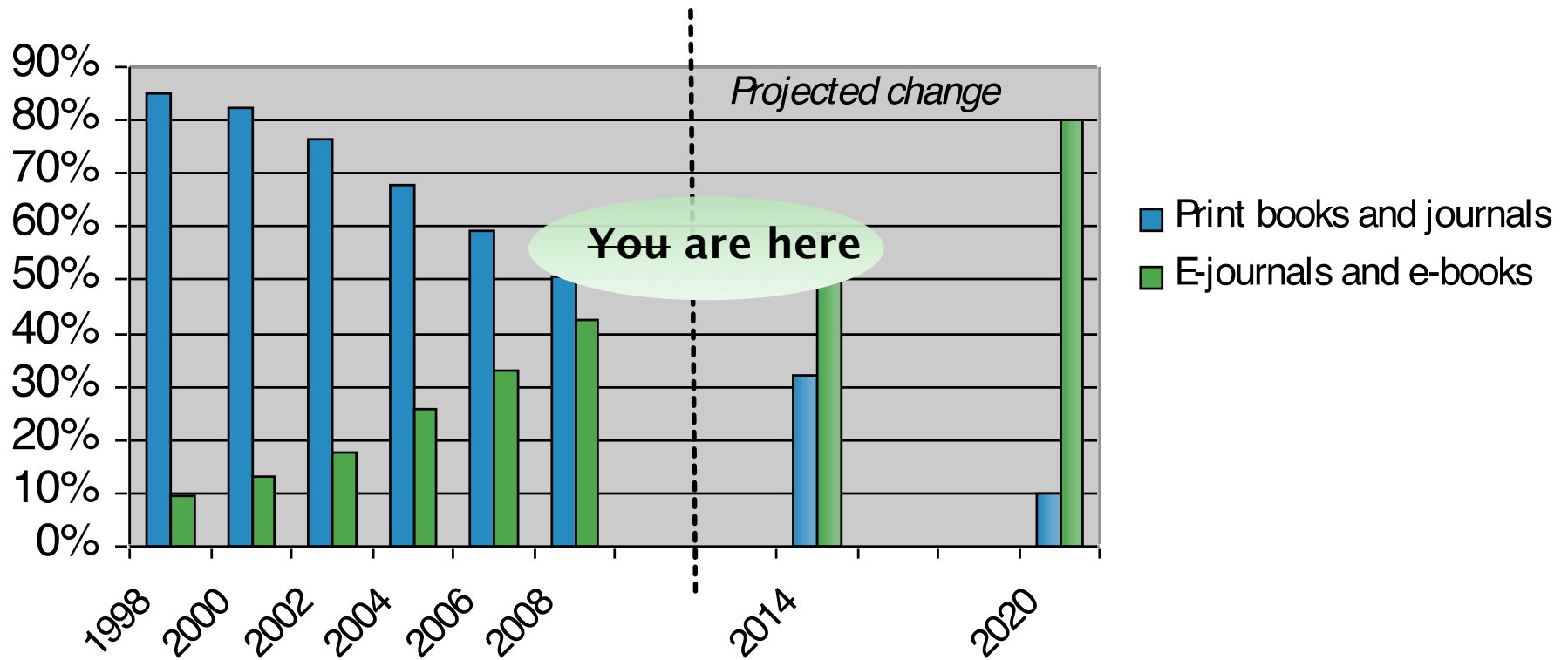
# Declining Investment in Academic Libraries (US)



**If this trend continues library allocations will fall below 0.5% by 2015.**

# Attention Switch: from Print to Electronic (US)

## Academic Library Expenditures on Purchased and Licensed Content



Derived from US Dept of Education, NCES, Academic Libraries Survey, 1998-2008

RLUK, Edinburgh, 12 November 2010

# In the US, a tipping point ...

center of gravity

Yale Harvard

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**Majority of research libraries shifting toward e-centric acquisitions, service model**

center of gravity

Yale Harvard

**Shrinking pool of libraries with mission and resources to sustain print preservation as 'core' operation**

# ... the books have left the building

**In North America, +70M volumes off-site (2007)**

**~30-50% of print inventory at many major universities**

*Growth in library storage infrastructure*

# A global change in the library environment

*The US academic print book collection already substantially duplicated in mass digitised book corpus*

Data current as of June  
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June 2010  
Median duplication: 31%



June 2009  
Median duplication: 19%

Data current as of June  
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# E-books plus stored print =

With the exception of a small number of large research libraries,

- retrospective print collections will be managed as a shared resource and
- physically consolidated in large regional stores

Library materials spending in the academic sector will be

- 80+% directed toward licensed electronic content
- distributed by a small number of large aggregators

Strong downward pressure on costs will

- push towards library consolidation,
- more resource sharing,
- move to outsourced services.

# Opportunity space

Academic libraries change the way they manage print collections

- *releases space* for new uses and facilitates a *redirection of library resources*;
- enables *rationalization of aggregate print collection* and *renovation of library service portfolio*

*But* impact bounded by

- change in spending contours
- what gets done where
- mutual changes in traditional processes and practices
- overt reliance on shared structures and services

# US Library Spending

<b>ARLs</b>	Print	Elec	Digital
End User Services	.25%	.25%	0%
Meta Data Services	.70%	.05%	0%
Content	20%	19.5%	0%
Lib Mgmt Services	2.45%	.025%	.001%
Salaries	44%		
Other	11%		

<b>Academic Libraries</b>	Print	Elec	Digital
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Meta Data Services	1.6%	.07%	0%
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<b>Public Libraries</b>	Print	Elec	Digital
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1<sup>st</sup> Budget Priority to Cut?

1<sup>st</sup> Budget Priority to Save?

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**15% service infrastructure**

# Specific Gravity - what gets done where

## Scholarly record

- Shared management of print collections?
  - Digitization
  - Offsite storage
- Licensed Journals
- Special Collections
- Grey literature
- Curation of institutional assets?
  - Data

## Systems - internal or externalize?

- New digital infrastructure
- 'Classic back-room systems'

## Research and learning engagement

- Space
- Systems
- Expertise - some kinds

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National?

Trans-national?

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Shared Services?

Common Processes?

Pooled Expertise?

New Resources?

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# Reconfiguring - the library and the system itself

Our shared future - will require a shared system

- new regime of reliance
- overt agreements and understandings
- new supra-institutional structures
- redefined relations among library types
- attention to local, regional, national and trans-national relations

## **Result**

- **individual institutional success as a valued local service provider**

# THANK YOU

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comments, questions and observations are  
very welcome via email...

with thanks to Lorcan Dempsey, David Lewis, and Constance Malpas  
for their contributions...



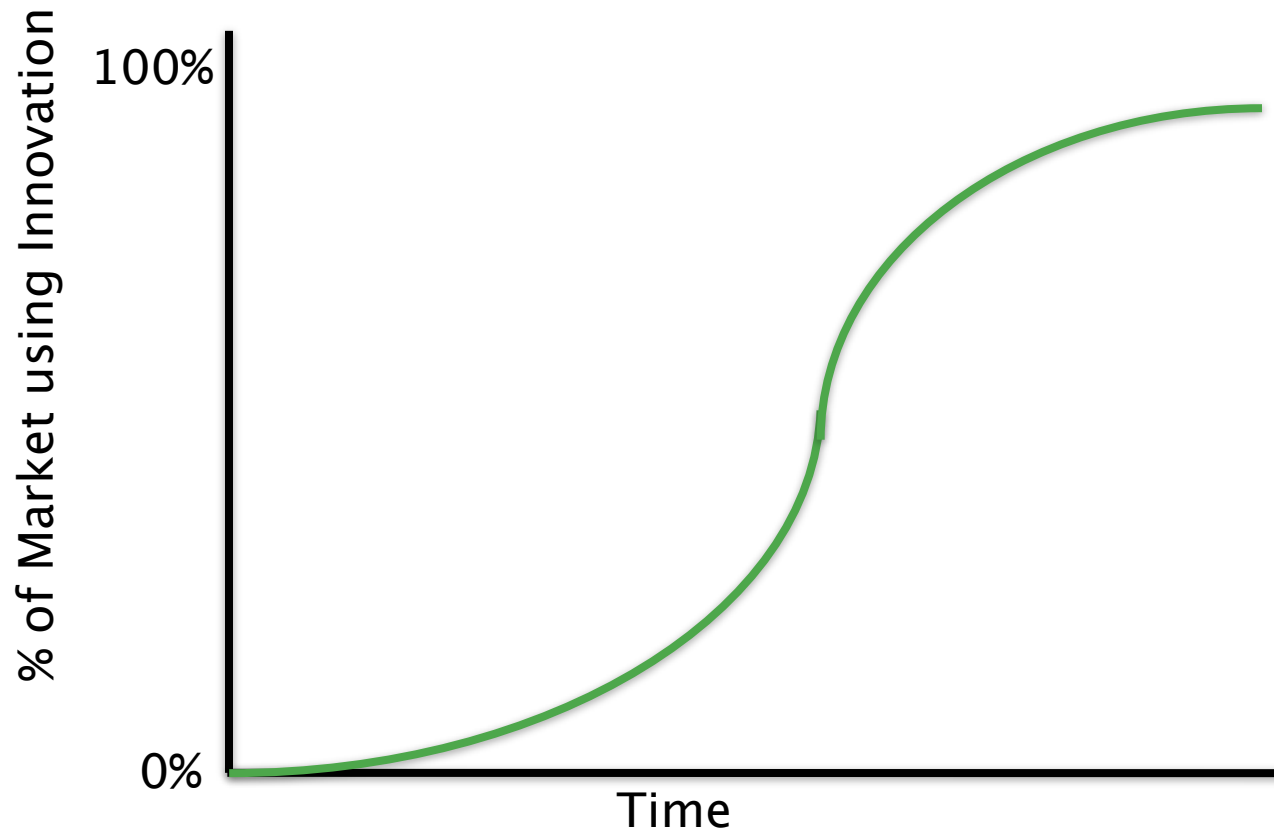
# Diversions

Re: open access



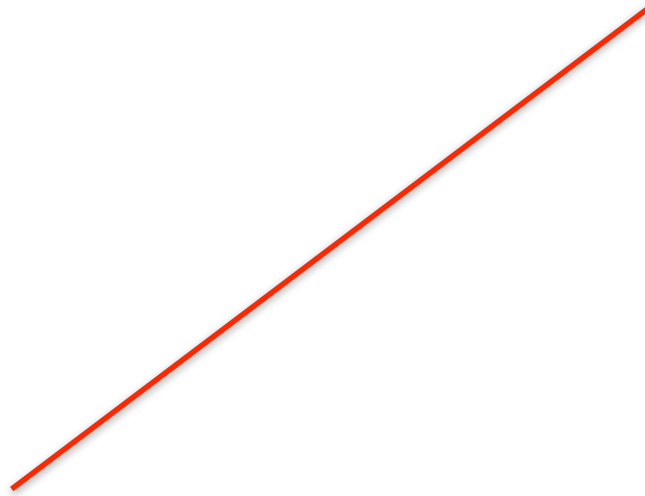
Figure 1: Straight Line Projection of Open Access Journals as a Percentage of the Total Universe of Academic Journals

# Pace of Disruptive Change



per The Innovator's Dilemma, Clayton Christensen

Figure 2: The Pace of Substitution of Open Access Academic Journals for Traditional Subscription Journals



**Green** projection based on Outsell data.

From David W. Lewis, "How to Think about the Pace of Substitution of Open Access Academic Journals for Traditional Subscription Journals," available at: <http://hdl.handle.net/1805/2030G>

**Unless we do something about journal costs  
e.g. trade license fees for open access support,  
Very little else can be done because this is where the  
money goes**

**End of diversion**