



Research Libraries - A global system A shared future

James Michalko

Vice President, OCLC Research

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With thanks to OCLC colleagues Lorcan Dempsey and Constance Malpas

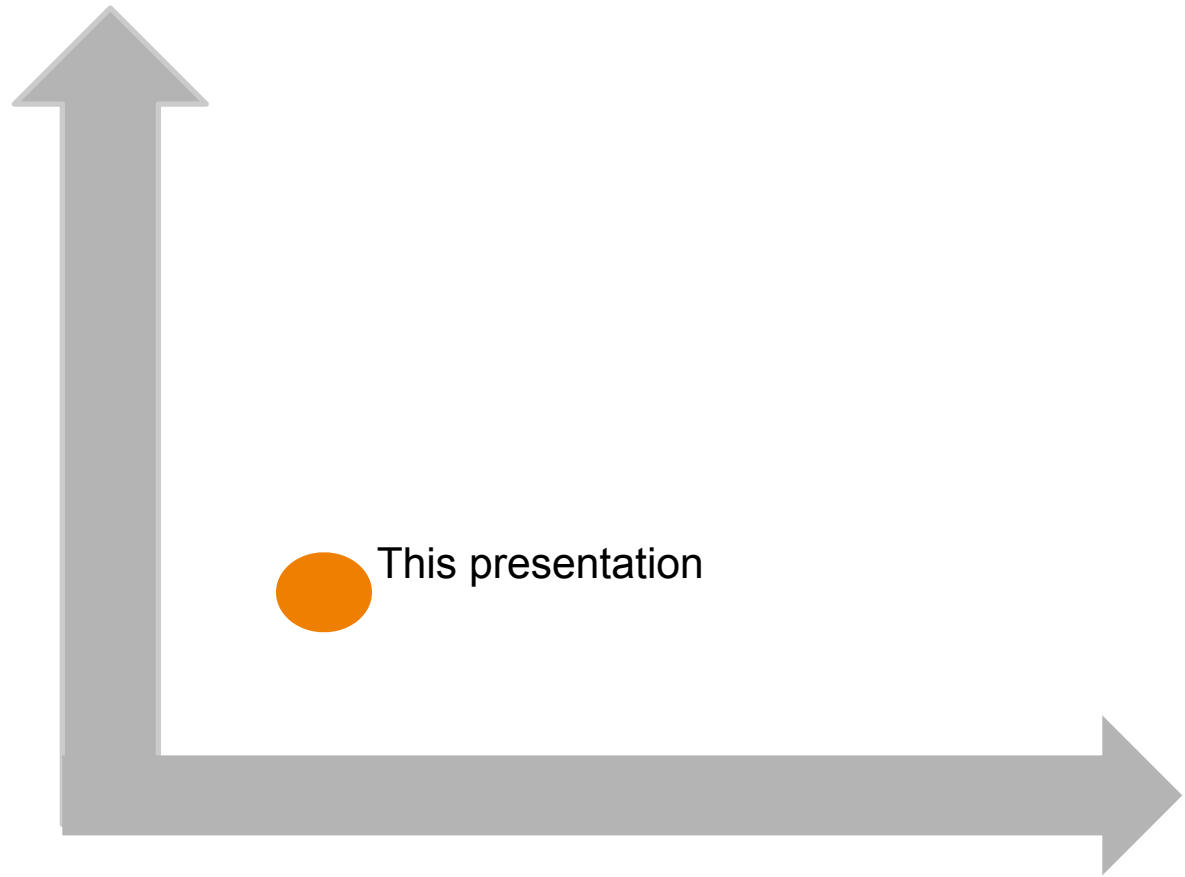
Two words

Two words

"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 21st 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

Research Information Management (RIM)
Role of Libraries in Data Curation
Support for Research Workflows
Supporting Research Dissemination
Mobilizing Unique Materials
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
Metadata Support & Management
FAST (Faceted Application of Subject Terminology)
MapFAST
Metadata Schema Transformation Services
Name Extraction
Sharing and Aggregating Social Metadata
WorldCat Genres
Infrastructure & Standards Support
PREMIS Maintenance Activity and Editorial Committee
SRW/U
System-wide Organization
Deaccession Materials Held in Print and Electronic Form
Define Policy and Infrastructure Requirements for Shared Print
User Behavior Studies & Synthesis
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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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

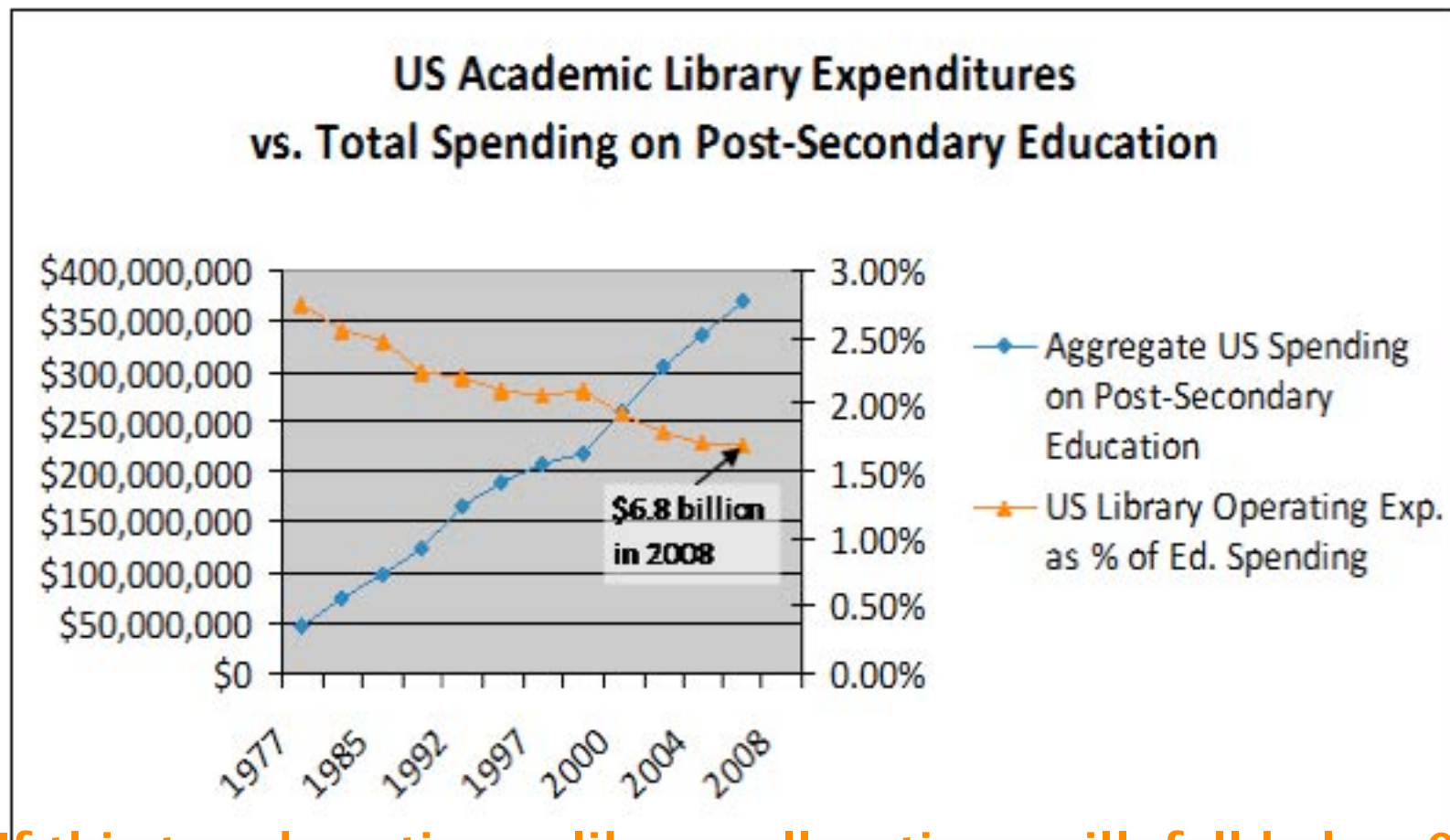
Changing nature of scholarly record

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

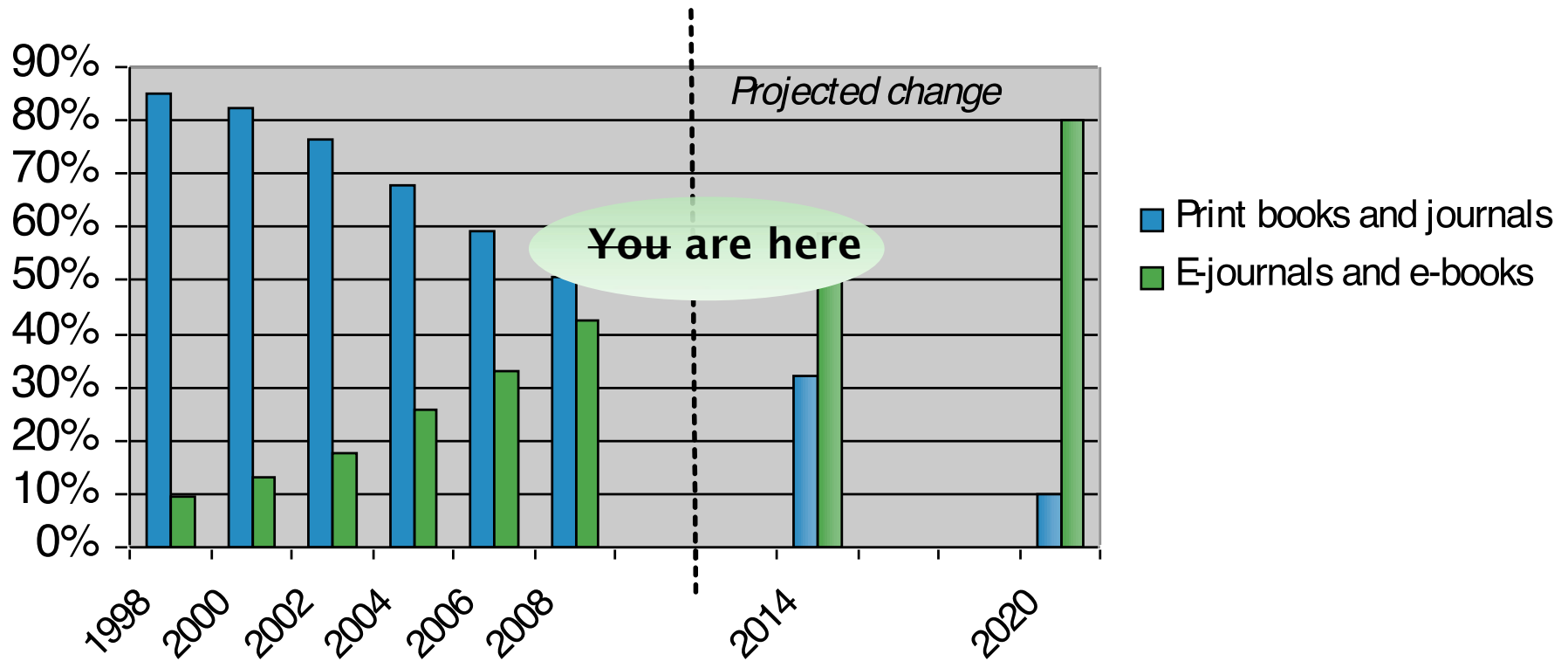
Declining Investment in Academic Libraries (US)



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
2010

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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

ARLs	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%		

Academic Libraries	Print	Elec	Digital
End User Services	.25%	.25%	0%
Meta Data Services	1.6%	.07%	0%
Content	19.5%	17%	0%
Lib Mgmt Services	2%	.28%	.02%
Salaries	49%		
Other	9%		

Public Libraries	Print	Elec	Digital
End User Services	.025%	.025%	0%
Meta Data Services	.28%	.02%	0%
Content	9%	1.5%	0%
Lib Mgmt Services	2%	.75%	.25%
Salaries	65%		
Other	17%		

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85% staff+stuff
15% service infrastructure

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1st Budget Priority to Cut?

1st Budget Priority to Save?

85% staff+stuff
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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Research and learning engagement

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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

MICHALKJ@OCLC.ORG

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

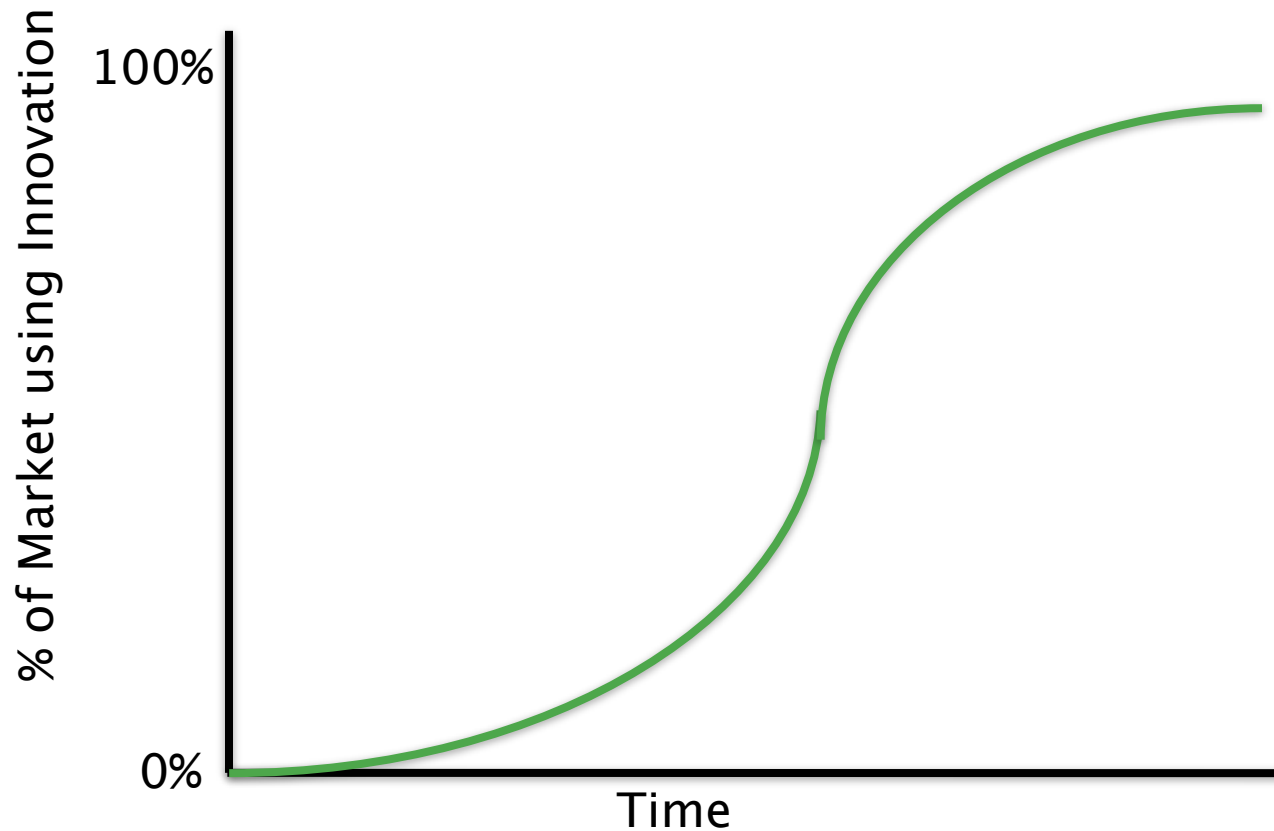
with thanks to Lorcan Dempsey, David Lewis, and Constance Malpas
for their contributions...

Diversions

Re: open access

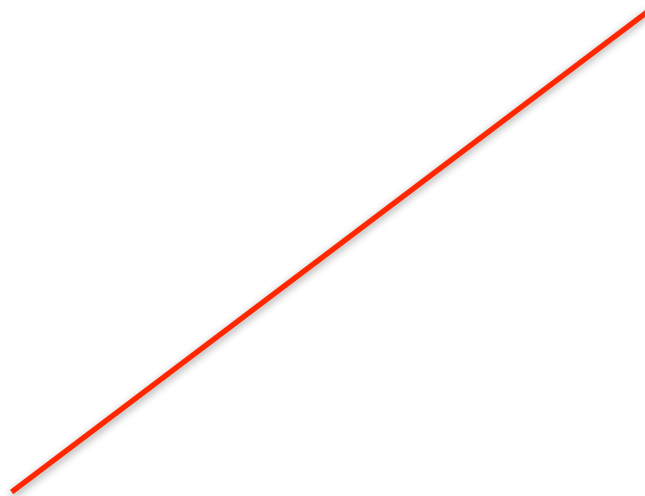
Figure 1: Straight Line Projection of Open Access Journals as a Percentage of the Total Universe of Academic Journals

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