‘How to best maximise the understanding of and access to our special and modern collections in the digital world’. 
1. INTRODUCTION

1.1 The briefing paper is intended to aid discussion at the RLUK and its development of a new RLUK Strategy. The paper presents a strategic view of the current state of special and modern collections digitisation activities in RLUK research libraries and indicatively across Europe. It also proposes some options for future action. Critically, it is intended to address if and how ‘digitisation’ might be prioritised, and perhaps even retermed, alongside competing agendas in large research libraries.

1.2 The paper includes two exemplar initiatives, a current funders report, and a list of suggested actions that will inform RLUK of the key issues associated with any potential future National Digitisation Review. In this complex area of library activity it is recognised that collectively, RLUK libraries have both considerable experience and much to learn, from each other and from other sectors in the digital ecosystem.

1.3 Over recent years many large research libraries have invested in digitisation facilities at institutional or consortia level. These facilities have supported both teaching and research projects. Additionally, a number of national funding programmes have worked to deliver high-value services and, in some cases iconic collections. Internationally, there have been some fundamentally important high-profile mass digitisation programmes.

1.4 The approach to-date in the UK and Ireland has produced many significant tools and new interpretations of collections online, but it was never originally intended to coordinate digitisation outputs or resources.

1.5 Key statements are in bold and compiled on page 23
2. EXECUTIVE SUMMARY

2.1 This briefing paper is intended to raise key questions for discussion at RLUK, not at this stage to provide preemptive answers except where there are proposed further actions. An overview of digitisation resources and potential activity can only be at a strategic level at this stage.

2.2 This piece of work is inclusive of modern, or lending materials and will support discussion following the amendment to the Public Services Information Directive. The briefing paper provides RLUK with the information needed to take a strategic view of the issues associated with a UK digital collection development initiative, referred to as the National Digitisation Review. Additionally, the paper references the Jisc-led National Monographs Strategy and provides RLUK with a high-level assessment of the state-of-play for books and archival materials in the digital age.

2.3 The main outputs for RLUK are:
   - Strategic view of national digitisation activity and its potential
   - Selected good practice towards a potential national initiative
   - Linkages to other relevant national and international activity

2.4 The issue of digitisation is approached through ten themes that give a view of both the complexity and potential benefits of approaching digitisation as a national issue:
   - The shift from special digital surrogates to mass programmes and back
   - The role of copyright and commercial gain
   - The addition of sound and moving images to outputs
   - The development of metadata standards
   - The need to build or hire permanent infrastructures
   - The opportunity of collaboration
   - The balance between teaching and research
   - The social interpretation of collections
   - The role of agencies and foundations
   - The design of online experiences

2.5 In addressing the ten themes, the paper reflects on two current strategic areas of RLUK work, Redefining the Research Library Model and Promoting Unique and Distinctive Collections. The paper presents ten key challenges in developing a national approach to digitisation, aimed at supporting decision-making at the Board in the context of a new RLUK Strategy:
   - Technical – Does the UK have the necessary technical expertise and infrastructure?
   - Legal – What are the main legal obstacles?
   - Operational – Can current operational processes merge with technical abilities?
   - Economic – What might be the positive economic benefits?
   - Resource – What are the resource dependencies and are they disruptive?
   - Timetabling – Is there a realistic schedule available to consider?
   - Financial – What options are there for supporting business models?
   - Market – What is the importance of a national approach to library users?
   - Cultural – Does a new approach conflict with existing practice?
   - Radical – How might digitisation enable library futures?

2.6 In order to deliver a meaningful paper for RLUK the key challenges will be presented in four strands of comment:
   - Strategic view of the current UK position
   - Indicative resources required in delivering a National Digitisation Strategy
   - Prospects and options resulting from a decision to move forward
   - Impact of a decision not to undertake further work
3. TEN THEMES

The themes below are not intended to be comprehensive and are focused, at this stage on discussion of digitisation activity in higher education. It could be argued that there is currently a more coordinated approach being adopted by commerce, public archives and the museum sector than by university libraries.

3.1 The shift from special digital surrogates to mass programmes and back

In terms of university library collections there has been considerable public interest in commercial attempts to include these in initiatives to mass digitise the world's knowledge, but less so in the more bespoke large-scale digitisation of rare materials, or indeed of sector-led mass digitisation of modern materials, although this is not the case with regards to Public Records. Most recently the trend has been a reduction in large special collections digitisation projects, resulting in a refocusing of university digitisation units towards local priorities. A return to larger more thematic digitisation projects will only be achieved through greater coordination of RLUK's cumulative institutional resources, and the appetite for international collaboration with regard to modern materials. Examples of this are the National Digitisation Consortium led by The National Archives, and the mass digitisation activities of both Google and Hathi.

Opportunity and discussion:
This trend has left a number of institutions with smaller digitisation units operating with less national coordination. Should universities deliver regional scanning centres?

3.2 The role of copyright and commercial gain

Whilst many high-profile digitisation projects have been funded to deliver freely available materials, there have been some notable commercial gains made by RLUK libraries by selling access to material. ProQuest and Cengage in particular have proved important partners to libraries. Institutions, or a combination of those and donors usually hold rights to rare materials. There appears to be more interest in exploiting this intellectual property commercially as legal restrictions on outputs dissipate with public funding. Copyright on modern materials is, often unhelpfully linked to national legal frameworks and there is an important high-level assessment to be made of how to address this in the digital world. Publicly funded projects have not, on the whole been transformative whilst the intervention of major commercial companies, such as that between the TNA and brightsolid has offered new business models.

Opportunity and discussion:
Themed products as well as comprehensive bibliographic tools by period are now established on the market. Equally, there remains an opportunity as shown by Hathi for a national digital collection to be made available. Should HE consortia charge to access specific themed content to the public?

3.3 The addition of sound and moving images to outputs

Digital products themselves have become richer and more complex owing to the increase of varied file formats and multi-layered content. Sound and moving images add depth to digitisation projects but also cost and intricacy to long-term preservation. There is also added complexity to rights management. However, in terms of producing contemporary teaching materials, public engagement resources and valuable research tools the inclusion of new media is now almost a prerequisite to a successful digital product. The leading edge in this area is currently not often in education, but rather in online magazine and newspaper content.

Opportunity and discussion:
Sound and moving images require more resources and different skillsets than have been found in traditional digitisation departments. Should libraries invest in these areas or out-source to existing suppliers?
3. TEN THEMES

3.4 The development of metadata standards

Much work has already been performed on the need for standards in digital collections. There remains a tendency for different national approaches and for some subject communities to work independently. Large-scale public and private funding has sought to agree and mandate standards as far as possible but there remain challenges in coherently defining characteristics of digital content and in ensuring embedded metadata remains with the digital object throughout its lifecycle.

Opportunity and discussion:
Outsourcing digitisation projects has emphasised the problem of managing controlled vocabularies across multiple partners. Is this a tension between theme 4 and others, such as theme 3?

3.5 The need to build or hire permanent infrastructures

Digitisation projects, particularly those involving special collections have in the past sometimes operated with a silo mentality towards the digital infrastructure, or ‘ecosystem’ they are linked to. In today’s digital world, and particularly with the growth of cloud computing, libraries are more aware of their place in the digital ecosystem of hardware (Apple, Cisco, HP etc.) software and Internet (Google, Microsoft, Oracle etc.), IT services (Accenture, IBM etc.) and even telecommunications. An example of the growth of the digital ecosystem can be seen in the infrastructure currently supporting the online gaming environment. Microsoft now deploys 300,000 servers to support X-Box 1, which is the same computing power as that of the entire planet in 1999. An emphasis may need to shift from micro-managing digital products on local servers to how national and international coordination of such services can be enabled by the availability of supranational computing. Although admittedly, this is as much an issue for policy makers as it is for technologists.

Opportunity and discussion:
Digitisation of materials should be seen now as part of large-scale computing in universities, albeit a comparatively small part in the medium term. In the university setting, should digitisation activity be scaled-up so as to be regarded at ‘business system’ level by IT departments?

3.6 The opportunity of collaboration

At the heart of this investigation, and by default at the centre of any future work in this area is the likely need for deeper collaboration amongst RLUK institutions, which it should be noted is itself already an international organisation. This is one of the more proactive ways in which the community might attract the interest of funding bodies and new partners in the technology industries. Partnerships that are not long held do not inspire trust in new collaborators. Such an approach is of course already a natural strength in RLUK, but not as yet in large-scale digitisation programmes. The TNA were only able to negotiate from a position of strength because of the consortial approach of the National Digitisation Consortium. Benefits included an end to suppliers claiming perpetual or exclusive rights to digitised content; only offering payment of a lump sum rather than pay-per-view; and lack of provision of user statistics, which made it hard to demonstrate the archive service’s value to their funders. The commercial companies have considerable negotiating strength when dealing with an individual university library, whose materials are not a hugely commercial prospect. At present, suppliers are seeking deals on terms that are far less advantageous than those RLUK might negotiate, and which do not offer the maximum benefits to the sector.

Opportunity and discussion:
Reducing isolation of activity in RLUK institutions will bring benefits. Should RLUK consider a consortial approach to digitisation in order to do better deals for its members and the sector?
3. TEN THEMES

3.7 The balance between teaching and research

Conventionally, digital materials have been viewed as the same object in different contexts, i.e. in teaching a digitised item would be used for descriptive purposes while in research it might act as a digital surrogate facsimile. In both settings, digital manuscripts, books and other items have great potential to be at the centre of new media and collaborative environments. There remains a need to digitise objects or collections for specific purposes but also a trend towards ensuring an ease of repurposing beyond original drivers where an object is not, in these cases, being digitised for commercial gain.

Opportunity and discussion:
Digitisation outputs are more likely now to be used in multiple contexts and this might be reflected in a national approach to selection and retention. Should educational use of materials always be free?

3.8 The social interpretation of collections

Many large higher education libraries now regard their activities in public engagement as a counterpart to their role in supporting teaching and research. These activities take many forms but are most commonly linked to access to and exhibitions of special collections, both in physical spaces and online. Digitisation units regularly support these forms of outreach but have not commonly worked in a consortial manner, even at regional level to guide the public through materials by thematic events or as groups of libraries. The public role of RLUK libraries is an important and comparatively under-represented area of work. Additionally, there is an open question as to how modern digital HE collections might interact with those in public libraries. A pay-per-view model is standard in digitisation projects involving family or parish records. Instinctively, university public engagement activities offer materials freely on the web however, there may be a need to shift this policy towards a more realistic business model where one project finances the next in addition to supporting its own availability.

Opportunity and discussion:
There is an emerging trend and still greater opportunity for academic libraries to interact more imaginatively with large public library services and learned societies. Should academic libraries shift to being more comfortable with charging for access to digital materials as they often do for library membership and if so, does the paradigm around public engagement also need to be more realistic?

3.9 The role of agencies and foundations

Funding, external to the institution that holds the object, has in the past sometimes almost wholly supported digitisation activity. In recent years this has shifted, reflecting the change from large-scale to bespoke digitisation projects. However, there remains much potential for further philanthropic and governmental funding of projects if such projects serve a clear purpose, particularly in terms of what might be termed, to appropriate from another area of library activity - Open Access Collections. Physical access to most RLUK rare materials is free at point of use, but there is a tension between digitisation projects that are aimed at the public and those that are intended to commercialise collections. A new strategic understanding between content providers (libraries) and funders is required that recognises the sustainable need for a mix of charged and free access. This is of course analogous to the open access movement itself, which has always argued that free-at-point-of-use does not actually mean free in terms of cost.

Opportunity and discussion:
A new language of interaction might be established between libraries, funders and agencies that better reflects the multiple drivers for digitisation, and in particular the cost of maintaining services beyond the period of funding. Should libraries argue for a new cost-base of national digital collections underpinned by a new agency (or indeed RLUK) distributing royalties by ‘library of origin’?
3. TEN THEMES

3.10 The design of online experiences

Libraries have commonly been at the forefront of aspects of online experiences, in particular discoverability, metadata descriptors and long-term access to digital objects and exhibitions. However, libraries could be said to sometimes be behind the curve set by museums and galleries in the approach taken to UX and web design of online environments. Few libraries, although there are exceptions, employ graphic designers or web designers as part of digitisation activities that serve public digital exhibitions. Conversely, many regional structures supporting work across special collections departments include members from university and public cultural heritage organisations who often do have professional design staff.

Opportunity and discussion:
RLUK could interact with organisations such as The Collections Trust on the issue of leading-edge web design as part of planning for digitisation projects. In furthering the concept of a National Digitisation Review should RLUK seek to link-up with museums and public archives rather than replicate some of those structures within HE?

4. Ten Challenges

In addressing the ten themes, this briefing paper specifically reflects two current strategic areas of RLUK work, Redefining the Research Library Model and Promoting Unique and Distinctive Collections. The paper presents the following ten key challenges, in the form of questions intended to raise discussion, in the context of a new RLUK Strategy, in developing a national approach to digitisation.

4.1 Strategic View
4.1.1 Technical

Does the UK have the necessary technical expertise and infrastructure? The plain answer to this question is yes. It is possible to advise in this paper that the UK, not least because of many years of development in its academic web provision, does possess the relevant technical expertise needed to move towards a National Digitisation Strategy for research universities. There is a caveat on the issue of infrastructure that requires further investigation, in that the combined resources of RLUK institutions could readily support a national approach to the act of large-scale digitisation, but the issue becomes less certain when considering preservation and storage. There is currently no technical provision or cost model to ensure long-term access to digital collections as a shared resource, even within RLUK. As is often the case though, the complication in this review is not technical but financial and political.
4. TEN CHALLENGES

4.1.2 Legal

What are the main legal obstacles? Ultimately, the issue of digitisation for research libraries now falls into two distinct categories in terms of historic collections owned or on deposit within those libraries and all other books, whether they are in copyright or not. The Google Books Settlement continues to develop and remains further complicated by national legal frameworks. It is noted that the proposed Google Book Settlement is different from the Google Partnership Programme, under which Google has made agreements with some publishers regarding on-line access to extracts of certain books. The Author’s Licensing and Collecting Society in the UK and The Author’s Guild in the US work together closely on the distribution of royalties from existing Google activity. Perhaps ironically, the ALCS was founded in the 1970’s to ensure that authors received payment from the public library system in lieu of books being lent rather than sold. In the digital world the equivalent is now Google and this situation will continue to move towards a global digital library.

4.1.2.1 The HathiTrust remains an initiative in progress, much like Google. Users affiliated with HathiTrust partner institutions are able to download full-PDFs of all public domain works, and works made available under Creative Commons licenses. Users who are not affiliated with HathiTrust partner institutions can download single-page PDFs of all public domain works, full-PDFs of works made available under Creative Commons licenses, and full-PDFs of public domain works that are not subject to third-party agreements. There is a significant overlap of volumes in HathiTrust and Google Book Search and if a book is “full view” in HathiTrust, it is possible that a PDF of the entire book can be downloaded from Google Book Search. With reference to the JISC-led National Monograph Strategy and the ongoing work at OCLC it is prudent to state at this stage that, despite national legal frameworks the aim of a ‘digital library’ of the world’s knowledge remains an international one. It could be argued that neither the UK, nor any other country should be attempting to digitise modern materials already online via the HathiTrust and/or Google. Rather, that these two initiatives should be accepted as world leaders and supported or challenged from that perspective. The legal questions (and indeed answers) for mass digitisation of modern materials in the UK could be considered as more being productively addressed through consortial licensing agreements with US initiatives already holding vast content, not seeking to duplicate the digitisation process itself. It seems probable that within 10 years, although possibly not before that, all books will be available behind some kind of pay-wall online. The most important counter-vision to this is the Digital Public Library of America.

4.1.2.2 The situation regarding historic materials is very different. If libraries are advised to effectively outsource digital availability of e-monographs they are in a more directive position concerning their special collections and archives. This position cuts to the heart of the emerging concept of the library as publisher. The obstacle in legal terms is becoming more complex however. Battle lines, similar to those in the early days of the open access movement are being drawn between libraries wishing to generate income from digital products and the open data community. The Europeana Project states for instance that what is in the Public Domain, (often otherwise described as out of copyright) needs to remain in the Public Domain. Exclusive control over Public Domain works cannot be re-established by claiming exclusive rights in technical reproductions of the works, or by using technical and or contractual measures to limit access to technical reproductions of such works. Works that are in the Public Domain in analogue form continue to be in the Public Domain once they have been digitised. The lawful user of a digital copy of a Public Domain work should be free to re-use, copy and modify the work. Public Domain status of a work guarantees the right to re-use, modify and make reproductions and this must not be limited through technical and or contractual measures. When a work has entered the Public Domain there is no longer a legal basis to impose restrictions on the use of that work. Europeana predates the new Public Services Information Directive (PSI), but also preempts it. Both state that the outputs of digitisation projects should be made freely available to the public, and for the first time the new PSI includes museums, galleries and university libraries. Research libraries may find themselves in the unusual position of acting in a similar fashion to the journal publishers they have challenged for so many years. The PSI, and indeed the Europeana Foundation ask difficult legal questions of digitisation projects, not least a potential national approach.
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4.1.2.3 Public-Private Partnerships have become one option for funding large-scale digitisation efforts. Commercial content aggregators pay for the digitisation in exchange for privileged access to the digitised collections. These activities are seen as a reason for attempting to exercise as much control as possible over digital reproductions of Public Domain works. Libraries are claiming exclusive rights in digitised versions of Public Domain works and are entering into exclusive relationships with commercial partners that hinder free access. The PSI Directive will challenge the position of libraries that generate income directly from digitisation of historic materials. In principle, RLUK has adopted a strong and respected position on open access but may need to ask difficult questions of itself when faced with balancing an instinct for freely available content and the desire to raise funds from that same content.

4.1.2.4 The key legal challenge currently in question in terms of the position of Europeana and the PSI Directive, is that the act of digitisation of Public Domain material does not create new rights over it.

4.1.3 Operational

Can current operational processes merge with technical abilities? As described in 3.1 the trend within RLUK libraries has shifted more than once over the recent decade. National coordination under RSLP was primarily focused on governance and standards rather than on taking a long view of how institutions’ cumulative equipment and staff might be used in a future consortial manner. This approach set the tone for the subsequent period of more individualised and bespoke digitisation projects, where institutions, such as University of Southampton that had previously taken a national business model approach, reverted to serving primarily institutional needs. This is where most RLUK libraries are at the moment. A possible action in the future would be to map RLUK capacity in terms of resource, (see 4.2.1.2) as considerable investment has been made in equipment. In parallel it could also be beneficial to investigate one or two services in more depth to assess working practices. A model could be established which scales-up those processes to that required by a national approach, and subsequently tested against an outsourced option, such as that used by The National Archives. The point to consider here is to what degree a reengineering project is needed by libraries in order to match recognised technical ability in many institutions with a national ambition.

4.1.4 Economic

What might be the positive economic benefits? This question specifically relates to a national approach, as opposed to any/existing economic benefits gained at institutional level. It has already been stated that working together would bring economic advantage to the sector, not least through the removal of duplicated effort but also, in the longer term more advantageous contracts with commercial digitisation companies and in the storage of materials. As has been shown by the LIFE Project, coordinated by UCL and The British Library the act of digitising is comparatively inexpensive to the preservation of the digitised object. Indeed, as far back as 2006 the LIFE Project was effectively recommending a national, or at least consortial approach to digitisation in research libraries in order to counteract the costs to individual institutions. The LIFE Project developed a methodology to calculate the long-term costs and future requirements of the preservation of digital assets. LIFE achieved this by analysing and comparing three different digital collections and by applying a lifecycle approach to each. From this work LIFE identified a number of strategic issues and common needs. The critical strategic issues presented by the LIFE Project remain:

A need for a wider collaborative approach between Higher Education (HE) and Libraries to aid in the cost-effective development of tools and methods.

The time required for the realistic development of the next generation of these tools and methodologies is largely unknown and may form part of a collective responsibility within the digital preservation community.

There exists a real opportunity to establish long-term partnerships between institutions to address common requirements. The challenge is to establish multidisciplinary project teams and programmes to lead these developments.
4. TEN CHALLENGES

There exists a real opportunity to establish long-term partnerships between institutions and industry to develop this methodology and to establish new opportunities to share knowledge and experience. The LIFE project could be seen as an important precedent for the development of these new opportunities.

4.1.4.1 The key issue when considering the economic benefits of a national approach to digitisation, whether that of historic or modern materials is the shared cost of collaborative storage.

4.2 Indicative Resources

4.2.1 Resource

What are the resource dependencies and are they disruptive? Resourcing for a national approach to digitisation can be viewed in a number of ways. There are the purely technical demands of scanners and servers, the level of skilled staff available and the financial imperatives derived from a collaborative way of working. Underpinning these, is the critical question of ambition, in other words should RLUK be considering a comprehensive approach to its collections or establishing a selection methodology more akin to a publishing model? The costs of digitising an item have received attention in other programmes and in strategic terms are on a downward trend, as equipment and storage costs are both decreasing. However, for RLUK to consider a national approach, it is more likely that a hybrid model would prove more sustainable, whereby two or more institutions perform some projects and others are outsourced. This is an area where further work is required before being able to make definitive statements, except to say that **in real terms the cost of digitisation becomes lower as the project becomes larger.** Logically, a national digitisation approach in research libraries would be more effective than multiple processes in institutions.

4.2.1.2 The resource capacity of RLUK institutions is cumulatively powerful and as has been shown by the HathiTrust in terms of monographs and by The National Archives in terms of archival records, a collaborative effort using all resources at the disposal of a consortium is beneficial to more users, more quickly and more sustainably. A possible area of further work would be to develop a methodological ration of resource / total collections. It is possible to say at this stage that a national digitisation strategy that aimed to digitise all of RLUK's historic collections would, in the long term be cheaper than a strategy that selected materials. However, there are clearly other factors in determining the level of ambition. A comprehensive aim would be more disruptive than targeted selection, but by default could also be more transformative.

4.2.2 Timetabling

Is there a realistic timetable to consider? Similarly to the resource question, the issue of a schedule for a 'completed' national digitisation strategy can only be fully determined by the scale of objectives in the strategy. Consequently, this is also an area where further work would be required, however, work carried out by OCLC and presented at the RLUK Member's Meeting 2013 implied that data was broadly available on catalogued special collections material. This data could be further investigated to provide an indicative national plan to digitise those collections suitable for public (or commercial) transfer. As a briefing note, it is recognised that some digitisation projects are faster than others owing to levels of relevant metadata addition and other technical concerns. An example perhaps, of how long a large project can take to complete is the Register of Births, Marriages and Deaths 1567-1969 by the TNA, which took two years and totaled 645,000 images derived from similar print objects. More complex projects on a larger scale, and the combined holdings of RLUK libraries would be one of those projects would obviously be long-haul undertakings.

4.2.3 Financial

What options are there for supporting business models? The financial question is different to those of economics and resourcing as it implies an investigation into how such a long-term project, and its even longer termed outcomes might be supported as the environment inevitably changes around it. The strategic question around the creation of a business model to support comprehensive digitisation is at the heart of the future of libraries – how and when should libraries migrate from an analogue business
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to a digital model? Parts of library delivery are of course already a long way down this road, in particular journals in STEM disciplines. The discussion is now at, what booz.com call an ‘inflection point,’ which is the point at which libraries must decide when to make a step-change in the delivery of their special collections as primarily digital services. The business model that supports the perhaps rather coldly described use of archival material as ‘analogue’ will change; it is, to an extent, for libraries to decide when and how. Digital collections will of course enhance rather than replace printed rare materials, but only for a few specialists. For the majority of library users, the digital versions will be the principal mode of delivery.

4.2.3.1 A national digitisation ‘service’ resulting from a comprehensive digitisation strategy will need new operating agendas and different supporting business structures. The open data ascendancy is on a collision course with the costs associated with its ambition. Libraries are going to need to position themselves on the most cogent point of a scale which at one end demands free access to Public Domain materials, (including special collections online) and at the other, makes enormous demands on their delivery and maintenance. The most obvious business model, and one used by other national projects has been to employ selective use of pay-per-view. RLUK may need to be prepared to take a robust position on this, depending on how it chooses to proceed, with both its contributions to Europeana and The European Library and its engagement with the Public Services Information Directive.

4.3 Prospects and Options

4.3.1 Market

What is the importance of a national approach to library users? The key to this question is not currently found in content but in devices. For all areas of modern life, the mass adoption of mobile devices has altered the way we are approached as consumers by almost every sector. It is possible to say that any service-oriented organisation that does not adopt the shift from analogue to digital will become less relevant to new generations of users, and libraries are of course just that kind of organisation. Cisco estimated that in 2012, there were over 10 billion devices worldwide connected to the Internet and that the overwhelming growth trend is in smartphones and tablets. The important question for libraries considering digitisation policy is no longer the shifting sands between print and digital but between desktop computers / laptops and mobile devices. When we consider how much library content should be digitised we should also be realistic about how that content will be viewed. This shift is resulting in recognised global megatrends; personalization; immersive experiences; real-time analytics; online and offline integration; content as advertising; leveraging the crowd. Most of these have applications relevant to discussion at RLUK, for example it might be possible to consider new business models based on using library content in corporate (institutional) advertising or developing crowd-sourced metadata projects towards greater digital footfall for collections.

4.3.2 Cultural

Does a new approach conflict with existing practice? The answer to this question is almost inevitably yes. A strategic view of contemporary western culture shows three important forces that are now driving digitisation across all sectors and aspects of life:

Technology push – expanding digital infrastructure, declining cost of technology, pervasive broadband, integrated data, always on connectivity, cloud computing and social networking.

Economic benefits – market valuation (growth/value capture acceleration), sources of differentiation and competitive advantage, value chain transformation (e.g., cost structure), ability to attract / retain consumers.

Consumer Pull – Anytime / anywhere expectations, multi-generational adoption of social media, changing consumption patterns (more mobile, more interactive), direct access to content, tools, brands. There are two questions for research libraries in taking a view on the culture in which they deliver their services now; are libraries prepared to shift financial models, staff opinion and business infrastructure
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to meet new reader demands? Will libraries risk irrelevancy if they do not do this? There is considerable

good practice in RLUK libraries and other parts of the education and cultural heritage sectors

but change is not happening as quickly inside these organisations as it is beyond them. The

conflict with existing practice might be said to be something to be embraced rather than avoided.

As mentioned in the ten themes, there is list of options proposed here as possible, practical ways

forward for further work specific to RLUK:

1) Mapping of RLUK digitisation facilities.

2) Investigate feasibility of thematic materials across RLUK becoming products brought to market and

also RLUK’s potential role as a licensing agent, giving examples in both special and modern collections

internationally.

3) Source best practice from the sector and beyond in the production of new media functionality to

support collection interpretation.

4) Collate existing work on managing standards specific to collections as digital products.

5) Establish levels of interest in parts of the digital ecosystem for engagement with a coordinated

approach to the discovery and preservation of digital objects and digital books, with particular reference

to the Hathi Trust.

6) Survey RLUK members to assess capacity and vision in digitisation services and initiatives.

7) Develop and/or collate case studies of how materials have been used across teaching and research

particularly where libraries also contribute research methodologies.

8) Open discussion between selected research, public and learned society libraries to consider ways

to better engage the public with special collections and to explore potential for shared, cross-sectoral
digital ‘lending’ collections.

9) An assessment made between key players from RLUK, the principal funding agencies and foundations

to explore respective aims.

10) A workshop could be supported in 2015 following the lines of the MuseumNext Conference, bringing
together designers working in libraries and museums.

4.4 Impact

How might digitisation enable library futures?

4.4.1 In presenting this briefing paper to the Board, it might be helpful to consider the question ‘Why

are we even talking about a national approach to digitisation?’ It has been some years since substantive

funding has been available for significant national programmes. Large research libraries are facing

many competing challenges, to the point where it may be possible to say that libraries now are asked

to resolve greater resource tensions than any before the information age. Planning for change in one

of the most dynamic contexts of the modern university, that of information provision requires flexibility

beyond the norm.

4.4.2 In answering the question ‘why’ we need to consider what we mean by digitisation now. It is
different from even the recent past, where valuable projects placed prized objects online. It is different

too, from the shift in print to electronic journals. It is different again from the addition to hand-held

devices known as the codex of those carrying the name Kindle. Digitisation now is so broad as to include

all these aspects; digital special collections, online scholarly communications and, more quickly than we

may be prepared for, comprehensive digital monographs.
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4.4.3 The question ‘why digitise’ is the real strategic one, rather than ‘how would we digitise.’
For our libraries to digitise (and by that we mean become full digital entities, not only sponsors of specific projects), our universities also need to share that vision. One of the myths surrounding the word digitisation is that it is an activity associated with the humanities. To digitise no longer solely means photographing historic materials. To digitise now has meaning for all parts of the library and the university it serves, just as it now means something different to almost all other sectors in the contemporary workplace – the word digitise could be said now to mean ‘acting in the digital age.’

4.4.4 It is not new to state that digital information is growing. Hathi is genuinely leading the way in the delivery of digital monographs, 76% of which are from between the years 1900 and 2000. The UK National Archives deliver over 200 online documents for every one of the 600,000 ordered annually in the reading rooms. It has been estimated by the RIN that UK scholars alone, download more than 100 million full-text articles per year. The five deposit libraries and the British Library now include e-deposit in their collective remit, an important indicator that perhaps a broader definition of digitisation as a cultural and professional term can now be said to include born digital materials.

4.4.5 In balancing the many competing demands on the university library in a maturing digital age, there is a risk that digitisation as a term becomes stuck in the age of the, otherwise still valuable, era of RSLP. There is another risk that without a redefinition digitisation is seen, when drawing up priorities at institutional and national level, as nothing more than a luxury.

4.4.6 Digitisation creates opportunities for user insights, market structures and efficiency.

5. CURRENT FUNDER’S REPORT

This is a commentary on the principal funders of digitisation programmes in the United Kingdom correct for December 2013. Much of the information is derived from Jisc, itself of course a major source of innovation and funding in recent years and also from the Centre for Data Digitisation and Analysis at Queen’s University Belfast. Further work may be considered appropriate for RLUK in determining new sources of partnership funding, in particular from the commercial sector and from North American sources.

5.1 The Arts and Humanities Research Council (AHRC)
There are a number of funding streams that are run by the AHRC that will support the creation of digital resources.

5.2 The British Academy
The British Academy supports digitisation of humanities and social science resources through a number of research grants including: British Academy Research Development Award (BARDAs) and Small Research grants.

5.3 Scottish Museums Council
This is a membership organisation for local museums and galleries in Scotland. Grants are made available to organisations that have full membership of the SMC (Scottish Museum Council). Funding streams include: The Main Grants Scheme, the Small Grants Scheme, Show Scotland grants, the Recognition Fund, the Gordon Fraser Charitable Trust Fund and Collections: Research and Travel Bursaries.

5.4 The Heritage Lottery Fund
The Heritage Lottery Fund uses money from the National Lottery to provide grants to support a wide range of projects that open up the nation’s heritage. The Heritage Grants programme supports projects that “conserve and enhance our diverse heritage or encourage more people to be involved in their heritage or both. Projects should also make sure that everyone can learn about, have access to and enjoy their heritage.”

The Heritage Lottery Fund operates regionally but is coordinated through a central office.
5. CURRENT FUNDER’S REPORT

5.5 Association for Heritage Interpretation (AHI)
AHI’s Interpret Britain and Ireland Awards Scheme has been recognising the most innovative and inspiring interpretation for the last 23 years. The scheme aims to reward best practice effectively. This scheme is currently being updated.

5.6 Association of Independent Museums (AIM)
AIM provides a thriving network of information and help for members. Through the Esmee Fairbairn Foundation the AIM Sustainability scheme is set to continue. Independent museums in London are also now eligible for grants.

5.7 Jisc
Jisc has been one of the principal funders of digitisation projects in the UK for many years but is now entering a new phase of its service to universities. It is more likely that the agency will act as a broker in the future than as a major source of funds.

5.8 Clore Duffield Foundation
The Clore Duffield Main Grants Programme does not fund individuals, but it can match lottery funding, fund capital redevelopments and provide project, programme and ongoing funding. The Foundation maintains a balance between supporting large-scale projects with far-reaching effects and small-scale local community initiatives.

5.9 Marc Fitch Fund
The Marc Fitch Fund offers awards to individuals and organisations in order to catalogue, conserve and make use of archives (especially those relating to ecclesiastical, antiquarian, archaeological or historical studies). The emphasis is on the regional and local history of the British Isles.

5.10 The Mercers’ Company
Heritage applications to the Mercers’ Company are considered within the areas of library/archive conservation. Applications within the Company’s heritage category are considered from all parts of the UK although there is a preference for projects in London, the south east of England and the West Midlands.

5.11 European Community Funding
There are many funding initiatives in the European Community that provide grants for capital projects and programmes for archives in the United Kingdom. Most in-depth information can be found on the CORDIS site, particularly those prioritised in the Framework Programmes. The new focus for digitisation funding comes in the EU Horizon 2020 policy, which not only replaces the previous ICT programmes but also includes a 46% uplift in funding. The policy is inclusive of 2014-2020 and is focused on small to medium enterprises, presenting both challenges and an opportunity for RLUK.

5.12 Museums Association
The Museums Association administers a number of funds including the Kathy Callow Trust, designated to enhance collections.

5.13 National Heritage Memorial Fund
The fund offers grants to help acquire, maintain or preserve any object or collection that is of outstanding scenic, historic, aesthetic, architectural, scientific, or artistic interest. The ‘memorial’ in the title shows that these grants are made to preserve in memory those who gave their lives in war.

5.14 National Lottery Big Lottery Fund
Big Lottery Fund gives grants to projects that ‘improve health, education and the environment and support voluntary groups, helping those most in need’. There is no reason in principle why projects in any area of the heritage should not be eligible for a grant, provided they fulfill the primary objectives of the fund.
5. CURRENT FUNDER'S REPORT

5.15 The Nuffield Foundation
The Nuffield Foundation have funded digitisation projects, primarily in support of the social sciences but are clear that they do not provide funding for projects that could be considered by a government department, Research Councils or a more appropriate charity.

5.16 Pilgrim Trust
‘Preservation & Scholarship’ is one of two major areas of interest for the Trust and the Trustees currently aim to allocate about 60% of annual grants under this heading. The fund covers the conservation of works of art, books, manuscripts, photographs and documents, and museum objects, where normal facilities for such work are not available, including records associated with archaeology, historic buildings and the landscape. The fund also covers the promotion of knowledge through academic research and its dissemination, for which public funds are not available, including cataloguing within museums, galleries, libraries and archives, and institutions where historic, scientific or archaeological records are preserved.

5.17 The Wellcome Trust
The purpose of the Wellcome Trust's Research Resources in Medical History grant scheme is to provide funding for high quality projects to catalogue and preserve significant history of medicine collections, with the aim of making such collections available to medical historians and researchers. It also aims to support, where applicable, projects based around the production of digital surrogates to improve access and reduce handling of fragile material.

6. EXEMPLAR: THE NATIONAL DIGITISATION CONSORTIUM – THE NATIONAL ARCHIVES

In August 2009, The National Archives (TNA) agreed with the relevant sector bodies (then comprising Society of Archivists, Association of Chief Archivists in Local Government and National Council on Archives, now combined as Archives and Records Association UK & Ireland) to develop a joint consortium on digitisation on the basis of proposal set out in this section, with thanks to the TNA for the annotated use of this content. The National Archives have been leading this consortium in a manner that could be replicated in some form within RLUK. Reflecting on the ten themes and ten challenges in this briefing paper, it is clear that the TNA has resolved some of those issues by presenting a regional-hub architecture supported by pay-per-view for certain parts of the content selected for national coordination. It is this combination of collaboration and commerce that has brought the National Digitisation Consortium success to date. A full case study might be helpful in the future for RLUK to understand in more depth how the TNA and its regional partners have worked through some of the issues facing research libraries in 2013.

6.1 Proposal
To develop a national consortium for digitisation of major record series held as a distributed national collection.

6.2 Background

6.2.1 Digitisation was seen by the TNA in 2009 as a huge opportunity for the sector to reach out to audiences far broader than those who visit archives in person. After selected digitisation of popular sources, The National Archives now, 2013 delivers over 200 documents online for every one produced on site at Kew. However, the view was taken that non-commercial digitisation is costly, often unsustainable and time-consuming, and had barely begun to deliver the nation’s written heritage online. Commercial digitisation, by contrast, had already put millions of pages online and continues to grow. The commercial digitisation companies had begun to look beyond The National Archives to deals negotiated with individual archive services. This is a similar position to that found in many RLUK libraries, where, in the absence of a national approach to digitisation, commercial companies have been able to come
6. EXEMPLAR: THE NATIONAL DIGITISATION CONSORTIUM
– THE NATIONAL ARCHIVES

to institutional-level agreements. In many cases this has been a successful partnership, but the TNA exemplar shows the greater infrastructural potential, and economic benefit of working together.

6.2.2 The commercial companies had considerable negotiating strength when dealing with an individual archive service, whose records alone, except in the cases of large municipal holdings such as those of Birmingham, Manchester, Belfast and Glasgow, were not a hugely commercial prospect. Until the formation of the National Digitisation Consortium, regional archives were seeking deals on terms that were far less advantageous than those The National Archives had negotiated, and which did not offer the maximum benefits to the sector. Examples, referenced previously in this briefing paper, (see 3.6) included perpetual or exclusive rights to digitised content; payment of a lump sum rather than pay-per-view; and lack of provision of user statistics, which made it hard to demonstrate the archive service's value to their funders. These less than beneficial terms will be familiar to some RLUK libraries currently.

6.2.3 The view was taken at the beginning of the initiative that a selective approach would be adopted in the first instance, although since 2009 the TNA have been digitising very considerable quantities of their own records systematically. National series which were initially proposed included: wills; quarter sessions; petty sessions; Poor Law records; school records; 1910 valuation records and parish registers.

6.3 Opportunities noted at the start of the project

- To digitise wholesale major collections of records with real commercial potential on a national basis.
- To make collections remotely available at minimal cost to the local or regional service.
- To negotiate strong deal terms for the sector, securing maximum benefits.
- To offer pay-per-view funding for services, which offered a modest revenue stream while resolving technical and resource problems inherent in developing small separate pay-services.
- To establish through online delivery of these records strong evidence of user demand for archives: a hard performance indicator comparable to number of onsite users.
- Existing individual projects might be proposed to be licensed by the commercial providers, offering greater sustainability and brought to a wider audience.

6.4 Challenges noted at the start of the project

Consortia only offer strength in numbers – if services did not participate, that strength would vanish and the commercial power would be negligible. Existing commercial arrangements or participation in familysearch.com by individual services were seen to have already weakened the consortium possibilities, (especially around parish records) Practicalities – to operate scanning facilities at every participating archive service was viewed as almost certainly impossible. A central scanning point or regional scanning points were viewed as more resilient options. Co-ordination was therefore seen as vital to the whole project. Data Protection affected many of the series with most commercial potential, and it was viewed at the time to be prudent to digitise up to 1914 only in most cases. There are resonances in RLUK libraries here, particularly following the changes to the Public Services Information Directive.

6.5 Consortium Development

6.5.1 Following agreement on the approach proposed by the original project team, a consortium developed, combining the sector contacts of the now combined Archives and Records Association UK & Ireland, with the commercial development expertise of The National Archives through a working group. The group agreed to develop a single commercial offer, with a single contract, to maximise potential. The Archives and Records Association would act as a non-profit-making signatory, with delegated powers from participating repositories, to which royalty payments will be made directly. This is a key point of discussion for RLUK and an opportunity for the Executive to act as some form of licensing agency on behalf of, and for the member libraries in the delivery of a nationally digitised body of content.
6. EXEMPLAR: THE NATIONAL DIGITISATION CONSORTIUM – THE NATIONAL ARCHIVES

6.5.2 Initial discussions for the TNA project identified two key series as options for a pilot: school registers pre-1914, and wills. Parish registers, although hugely popular for research, had been extensively digitised in some record offices and the complexities of the position were felt to be too great for a pilot. A survey of records among potential participants then decided the focus of the pilot. Wills, although highly used, had complex structures and low numbers of names per page. School registers were recognised as name rich, relatively standardised in format and offered great community outreach and indeed, public interest potential as many registers related to surviving schools. They were therefore selected as the most suitable pilot series. This process of selection is pertinent to a likely achievable process for RLUK, where member libraries might consider a consortial approach to effectively publishing material, managed centrally by a representative governance structure.

6.5.3 A fuller survey of school registers was undertaken 2010-11, leading to a commercial licensing opportunity offered in June 2011. This comprised all nine English regions and over 90 participating repositories. Welsh repositories, making a total consortium membership of 120, have since joined them. There was substantial interest from major commercial companies, and, showing the length of time required in these projects, contracts were signed with brightsolid in August 2013.

7. EXEMPLAR: ENUMERATE – EUROPEAN STATISTICS ON CULTURAL DIGITISATION – THE COLLECTIONS TRUST

ENUMERATE is an EC-funded project, led by The Collections Trust. Its primary objective is to create a reliable baseline of statistical data about digitisation, digital preservation and online access to cultural heritage in Europe. Currently, statistical data on Europe’s digital heritage is tentative and scattered at best. For the European Commission and many of the agencies in the field of culture there is no consistent evidence base for making strategic decisions on investments in digitisation. ENUMERATE is bringing about major improvements in the quality and availability of intelligence about digital heritage.

7.1 A consortium of ten partners is at the heart of the ENUMERATE ‘Thematic Network’. Together they have initiated a Europe-wide community of practice to share statistical data and knowledge on the progress of digitisation. A multi-annual programme of coordinated surveys is achieving this. There is wide-scale harmonised statistical data gathering and more in-depth surveying of digitisation activities by European cultural heritage institutions. All activities of ENUMERATE start from the principle that heritage institutions will receive useful information in return for sharing their data. Results are published on an open data platform, where raw and summary data can be viewed and collated by interested parties.

7.2 The ENUMERATE Survey Report on Digitisation in Cultural Heritage Institutions 2012 represented the first major study into the then current state of digitisation in Europe. It was the result of a survey carried out by the ENUMERATE Thematic Network, with the help of national coordinators, in 29 European countries. About 2000 institutions answered the open call to participate between January and March 2012.
The survey asked questions about:

- The state of digitisation activity in the institution responding.
- Access to digital collections.
- Its digital preservation strategy.
- Expenditure of digitisation by the institution.
- Digitisation activity:
  - 83% of institutions said curatorial care is part mission.
  - 83% of institutions have a digital collection, or are currently involved in digitisation activities.
  - 20% of all collections that are judged appropriate to be, are digitised.
  - Art museums are the most digitised with 42%, national libraries have only 4% digitised of a target of 62% of their collections.
  - Photographs are the most digitised object type.
  - 89% of audiovisual institutions have born digital collections, while 43% of museums of art and history have them.
  - 34% of institutions have a written digitisation strategy.

7.3 About one third of the institutions are included in a national digitisation strategy. For national libraries more than half are included. For the purpose of this briefing paper it is very significant that even the use of the phrase ‘national digitisation strategy’ is now widespread across Europe, although there is clearly further development needed for this to be a meaningful term across all sectors.

7.4 Since information on monitoring the progress of digitisation of cultural materials is notoriously hard to collect this project had to use different channels to get at the data. Data collection has been and is being done in a mix of web searches; consultations with ENUMERATE consortium members, the national coordinators and other international experts in digitisation. The following is a compiled list of pan-EU, national projects and North American initiatives that are pertinent to this briefing paper.

7.5 International Monitoring Projects

7.5.1 EGMUS Standard Questionnaire and ALOKMI
Country: Europe :: www.egmus.eu/

EGMUS is the European Group on Museum Statistics. The group was established in 2002. At present 27 European countries, from within and outside the European Union, are represented. The main objective of EGMUS is the collection and publication of comparable statistical data. Available data from national museum statistics and surveys are compiled and updated and stored in the Abridged List of Key Museum Indicators (ALOKMI) table. An alternative for this effort to harmonise scattered data is the use of a Standard Questionnaire, which was developed in 2008 by EGMUS and which can be used as a component in national surveys. Various countries already use the Standard Questionnaire in their national surveys. At present improvements to the questionnaire are in development. The scope of the monitoring activity is broader than digital cultural heritage, but questions about the use of information and communication technology are part of the Standard Questionnaire.

7.5.2 ESSnet-Culture
Country: Europe :: www.cros-portal.eu/content/essnet-culture-final-report

ESSnets are networks of several organisations from different countries within the EU, belonging to the European Statistical System (ESS). Eurostat initiated ESSnets in order to speed up methodology development and the exchange of ideas and insights in the statistical domain. The work of a particular ESSnet should lead to results that are relevant to the ESS as a whole. The ESSnet “Cultural statistics” project started in September 2009 for a period of 2 years.
7. EXEMPLAR: ENUMERATE – EUROPEAN STATISTICS ON CULTURAL DIGITISATION – THE COLLECTIONS TRUST

Participating countries were: Luxembourg (Ministry of Culture, also the coordinator), France (Ministry of Culture and Communication), the Czech Republic (Czech Statistical Office), Estonia (Statistics Estonia) and The Netherlands (Ministry of Education, Culture and Science).

7.5.3 PrestCentre Cost Survey
Country: Europe :: www.prestocentre.eu/webform/costs-survey

In the field of AV archives PrestoCentre is collecting data about planned and completed film, audio and video digitisation projects. The PrestoCentre Cost Survey gathers information about budgets, particularly long-term budgets. Information is being gathered to map out an encompassing understanding of the challenges facing AV digitisation and preservation initiatives. The compiled results of the PrestoCentre Cost Survey will be useful for both the PrestoCentre and the AV archiving community. It will help to understand the wider context of experiences, issues and practices in which AV archives operate.

7.6 National Projects

Many national efforts in monitoring the progress of digitisation are connected to the ENUMERATE project. However, such initiatives on a national level in individual EU member states are still comparatively rare. At present national initiatives have been found in 30% of EU member states.

7.6.1 Cijferboek cultureel erfgoed (“figurebook cultural heritage”)
Country: Flanders-Belgium

Quantitative data for every heritage organisation about: management, financing (costs/revenues), employment, infrastructure, collections (type, size, acquisition, use), conservation/preservation, public activities & visits, research & educational activities.

7.6.2 DIGIP A T

At the Belgian federal level, an encompassing digitisation plan started in 2004. A second phase has taken the form of a PPP, which remains in a preparatory negotiations phase. This digitisation plan frames the largest part of the digitisation initiatives in the cultural and scientific institutions under federal authority, and monitors their progress.

7.6.3 No name is given for this initiative
Country: Czech Republic

In 2009, the Ministry of Culture carried out an extensive survey among national cultural organisations (institutions receiving contribution from the state budget) related to digitisation. The survey mapped financial, technical and human resources for cultural material that is: (a) part of an institution's analogue collection, (b) already digitised, (c) scheduled for digitisation in the near future and (d) planned for restoration prior to being digitised.

7.6.4 No name is given for this initiative
Country: Lithuania :: www.lrkm.lt/go.php/lit/Lietuvos_kulturos_paveldo_skaitmeninimo_/430/6/194

An annual questionnaire is sent out to cultural institutions containing questions on the number of digitised resources, its Internet accessibility, usage and on financial issues. Data is collected in the form of (amongst others) page numbers, items or hours, downloads, funding, staff hours etc. The data is reported to the Council on Digitisation of Lithuanian Cultural Heritage.
7. EXEMPLAR: ENUMERATE – EUROPEAN STATISTICS ON CULTURAL DIGITISATION – THE COLLECTIONS TRUST

7.6.5 More Digital Facts
Country: Netherlands

As a follow-up to the Dutch NUMERIC contribution The Digital Facts, DEN conducted research into three topics that previously had gone unexamined. These topics were: born digital collections, the costs of digitisation and web statistics. The research culminated in a calculation model for digitisation costs, recommendations for digitisation, tips for relevant web statistics and a terminology list for born digital heritage.

7.6.6 No name is given for this initiative
Country: Poland

One of the tasks of the Committee is to gather information about current and planned digitisation initiatives of all kinds of cultural materials in different institutions, and to create overviews of such digitisation in order to prevent duplication of effort, and being able to indicate the increase of digitised material in the future.

7.6.7 Registo Nacional de Objectos Digitais
Country: Portugal :: www.rnod.bnportugal.pt/

The National Library of Portugal is currently developing a national registry of digitised/to be digitised library materials called RNODE (National Registry of Digitised Works) that will function as a tool for coordination and aggregation of metadata from OAI servers to convey such data to Europeana. Organisational procedures are being defined. The specification that the registry contains digitised and to be digitised works implies that some form of monitoring of progress is in place.

7.6.8 No name is given for this initiative
Country: Sweden

In 2010, the government began to gather information for formulating a national strategy on digitisation, on-line access and digital preservation. All state or state subsidised cultural institutions had to report their level of progress in this field. The national strategy is not yet in place, but the government has set up a secretariat for coordinating activities concerning digitisation.

7.6.9 The Survey of Library and Museum Digitization Projects, 2011 Edition

This is a commercially initiated, broad survey, aimed at collecting data of digitisation projects in the Western world. The survey is conducted in a relatively small sample of about 100 libraries and museums (archives are excluded) in Northern America, Europe and Australia. The survey questionnaire is lengthy and rather detailed. Topics include: what kinds of materials are being digitised, the costs of digitising; staffing costs; presentation and publishing details; outsourcing; the use of equipment; digital asset management; marketing; copyright and licensing; etc. Survey results are presented in a commercially available report.

7.6.10 UIS Cultural Statistics

UIS is now monitoring data on ICT-related activities of cultural institutions, including museums and libraries, e.g. in relation to education. It can be concluded by this exemplar that there are surprisingly few EU countries and organisations/associations in the cultural heritage domain that have existing surveys and other monitoring mechanisms for gathering data about cultural heritage digitisation progress, costs and use, in place. More positively, there are a number of major EU states that have in place, or intend to have in place a national digitisation review or strategy. Currently, the leading organisation in the field in the UK is The National Archives.
8. CONCLUSION

As debate is opened in our community it is hoped that the tenth challenge – that of being radical might allow for a view to be taken of digitisation where it enables libraries to draw parallels between the additional shifting sands of competing institutional demands. Equally, that those demands that are common in RLUK libraries might allow for a national approach in some areas to develop. In other words, that retermed holistically, digitisation might become not just what is expected of libraries, but central to how libraries interact in the next period of the digital age.

8.1 This briefing paper has taken a ‘literature review’ approach to current activity in the UK and in Europe in particular but is not intended at this stage to be considered comprehensive. It is clear that there are examples of good practice for RLUK to benchmark against in any future development of its consideration of a national approach to digitisation, but also that these are still relatively uncommon.

8.2 The paper suggests that a national digitisation strategy for RLUK members should focus on an approach which is selective without losing sight of long-term comprehensiveness, which is mindful and open to new commercial partners, which develops a business model on a mixed basis of free to readers and pay-per-view but not lump sum payments from suppliers and which is focused on rare, special and historic materials rather than on modern monographs that remain of global concern and are being addressed by other initiatives. The sands of digitisation are indisputably shifting.
9. KEY STATEMENTS

There is currently a more coordinated approach being adopted by commerce, public archives and the museum sector than by university libraries. (p.5)

Suppliers are seeking deals on terms that are far less advantageous than those RLUK might negotiate, and which do not offer the maximum benefits to the sector. (p.6)

Should libraries argue for a new cost-base of national digital collections underpinned by a new agency (or indeed RLUK) distributing royalties by ‘library of origin?’ (p.7)

The legal questions (and indeed answers) for mass digitisation of modern materials in the UK could be considered as more being productively addressed through consortial licensing agreements with US initiatives (p.9)

When a work has entered the Public Domain there is no longer a legal basis to impose restrictions on the use of that work. Europeana predates the new Public Services Information Directive (PSI), but also preempts it. (p.9)

To what degree a reengineering project is needed by libraries in order to match recognised technical ability in many institutions with a national ambition. (p.10)

In real terms the cost of digitisation becomes lower as the project becomes larger. (p.11)

For the majority of library users, the digital versions will be the principal mode of delivery. (p.12)

When we consider how much library content should be digitised we should also be realistic about how that content will be viewed. (p.12)

There is considerable good practice in RLUK libraries and other parts of the education and cultural heritage sectors but change is not happening as quickly inside these organisations as it is beyond them. (p.13)

The question ‘why digitise’ is the real strategic one, rather than ‘how would we digitise.’ (p.14)

A broader definition of digitisation as a cultural and professional term can now be said to include born digital materials. (p.14)

Further work may be considered appropriate for RLUK in determining new sources of partnership funding, in particular from the commercial sector and from North American sources. (p.14)

It is clear that the TNA has resolved some of those issues by presenting a regional-hub architecture supported by pay-per-view for certain parts of the content selected for national coordination. (p.16)

This process of selection is pertinent to a likely achievable process for RLUK, where member libraries might consider a consortial approach to effectively publishing material, managed centrally by a representative governance structure. (p.18)

It is very significant that even the use of the phrase ‘national digitisation strategy’ is now widespread across Europe. (p.19)
The following organisations in particular are thanked for providing direct collated material in the case of Jisc, Booz, TNA and The Collections Trust, and others for information and help in the development of this paper:

University of Southampton, Library Digitisation Unit
University of Manchester, Centre for Digital Excellence
University of Nottingham, Department of Manuscripts and Special Collections
University of Cambridge, Cambridge Digital Library
University of Leeds, Leeds Digital Library
Queen's University Belfast, Centre for Data Digitisation and Analysis
Trinity College Dublin Library and The Long Room Hub
King's College London, Department of Digital Humanities
UCL Library Services
Dublin City University Library
The Wellcome Trust
Harvard University, Harvard Library Innovation Lab
Camden Borough Council, Department of Libraries and Archives
The British Library
The National Archives
Archives and Records Association UK and Ireland
The Collections Trust
Museums Association
Digital Public Library of America
Google
Cisco
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RIN
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OCLC
OCLC
Booz
HathiTrust