Universities, libraries, collections, futures

Lorcan Dempsey
Miles Conrad Lecture
1 March 2010
NFAIS 52nd Annual Conference, Philadelphia
Education: trends

Collections: trends

Academic libraries: trends

Unburdened by expertise

Unburdened by numbers

Unburdened by evidence
The business of education

Research and learning workflows

Information products and services

Technology
The business of education

Research and learning workflows

Information products and services

Technology
Overview
education trends
Welcome to Bohecker College!

Bohecker College has a legacy of more than eighty years of excellence and a commitment to professional training and education. We have taken the hassle out of a college education. Earn an Associate Degree or Diploma in a broad variety of programs ranging from Nursing and Healthcare to Business and the trades through our fast-track training programs. Smaller class sizes, relevant hands-on training, tutoring and convenient locations all make Bohecker College the place to earn the degree you need. Become a college graduate in no time. Be a part of the legacy that sets Bohecker College apart from the rest.
Colleges have three basic business models for attracting and keeping students. Two will continue to work in the next decade, and one almost certainly will not. *Chronicle of Higher Education*
1. **Research/elite** (Strong brand, connected to international network of science and scholarship; educate many of the political and business elite; flagship),

2. **Convenience** (community colleges and for-profit providers, focused on preparation for further education or for a career) *Education as a service.*

3. **Struggling middle** (broad education. Not kept up with distance and convenience agendas, high overhead, limited research funding).

While strong public funding and regional agendas may mitigate this division in other countries, in particular sustaining a diverse ‘middle’, general trends support it: these include *internationalization*, the recent *historic growth in numbers* participating in third level education, *economic* pressures, and a focus on comparative international *evaluation*.

(vocabulary adapted - LD)
### Top 200 World Universities

<table>
<thead>
<tr>
<th>Rank</th>
<th>2008 Rank</th>
<th>Institution</th>
<th>Country</th>
<th>Peer Review Score</th>
<th>Employer Review Score</th>
<th>Staff/Student Score</th>
<th>Citations/Staff Score</th>
<th>International Staff Score</th>
<th>International Students Score</th>
<th>Overall Score</th>
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<td>9</td>
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Many countries have initiatives which try to concentrate resources on research excellence, aiming to maintain or establish their presence in the Research/elite group. These include China, Germany, S Korea, Japan, Canada, Taiwan, France.

Some countries/regions more consciously support ‘directed diversity’, looking at the balance between research excellence, broad-based education and vocational/convenience approaches: these include Australia, Norway, and Catalonia.

(Several sources – LD)
Predictably, institutional attention and resources are directed at activities and local infrastructure that supports high-profile research activities, especially in the natural and social sciences, where federal funding can account for up to 70% of the institutional research portfolio.

Scholarship in the humanities, by contrast, is much more dependent on institutional budget allocations and private grant funding. As a result, support for library-based research in the humanities is especially vulnerable to changes in academic priorities and the availability of endowment funds.
Scholarly work that used to depend on local research collections and infrastructure is increasingly reliant on content and services that are created and managed outside of individual academic institutions.
Between 2000 and 2008, the for-profit post-secondary educational sector in the United States grew by 12%, from fewer than 2500 to more than 2700 institutions, as the total number of private, not-for-profit and publicly funded institutions shrank.

While commercial educational providers remain a marginal source of doctoral education, they have emerged as significant players at the Master's level, with more than 170 for-profit institutions offering terminal degree programs in the 2007-2008 academic year compared to just 156 public universities, and especially at the Baccalaureate level, where for-profit institutions account for more than 35% of all degree-granting institutions in the United States.

Strong presence in South America, Eastern Europe, Asia.
Influence on the middle
Universities find it useful and economical to internalize a bundle of library-related activities.

As the pattern of transaction costs change, so too will the boundaries of the library.

Researchers/learners have more options – network.

a Coasian view of the academic library
The example of corporate sector?
collection trends
Volume of publications will continue to grow. Format will become less important than channel: Education (text books, learning materials), Consumer (Amazon/Google/Apple), professional publishing (Pearson, Reed-Elsevier, Thomson Reuters), ... 

Growth in public and research materials but concerns about how to sustain in longer term.

Research and learning materials as social objects. Social will become a major element of all publishing – content will be the basis for learning and social experiences.

Move to digital raises major issues around ‘knowledge enclosure’ through licensing which create interesting service issues for (public) libraries.
Academic Library Expenditures on Purchased and Licensed Content

Data from NCES. Analysis by Constance Malpas.
## Forecasts – Digital Availability of books

<table>
<thead>
<tr>
<th>Current*</th>
<th>Segment</th>
<th>Five Years*</th>
<th>Ten Years#</th>
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<tr>
<td>10%</td>
<td>Acad/Prof:</td>
<td>75%</td>
<td>30%</td>
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<tr>
<td>20%</td>
<td>Text books:</td>
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<tr>
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<td>College:</td>
<td>20%</td>
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<td>H/S:</td>
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</tbody>
</table>

**Memo:**
*Assumes top tier publishers – 1,000 active publishers
# Assumes any active publisher selling on Amazon.com

**Impact of Google Book Search and Google Editions?**

*OCLC work commissioned from Michael Cairns.
Based on interviews with selection of industry experts.*
Forecasts – Digital Revenues (books)

<table>
<thead>
<tr>
<th>Current*</th>
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<th>Ten Years#</th>
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<tbody>
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<td>0%</td>
<td>College:</td>
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<td></td>
<td>H/S:</td>
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Memo:
*Assumes top tier publishers – 1,000 active publishers
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OCLC work commissioned from Michael Cairns.
Based on interviews with selection of industry experts.
**Models of Provision for Scholarly Communication/Journals**

**Free Access**
- Open Access (e.g., PLoS)
  - ArXiv.org
  - RePEc.org
  - PubMed Central
  - NARCIS

**For-Profit**
- “trad” Publishing

**Paid Access**
- ICPSR
  - American Economic Review
  - JSTOR

**Non-Profit**
- Author Pages
  - Social Networks (e.g., Nature Network)
  - Open Access (e.g., BioMed Central)

- Small but growing segment, aided by public policy support
- Mostly experimental at this point

**Often enhanced with new forms of value added:**
- e.g., bundling articles with data; semantic enrichment
- Long tradition of coexistence with commercial publishing

- Mostly experimental at this point
- Small but growing segment, aided by public policy support
5 years?
COLLECTIONS GRID

Stewardship

Low-High
Books & Journals
Newspapers
Gov Documents
CD & DVD
Maps
Scores

Low-Low
Freely-accessible web resources
Open source software
Newsgroup archives

Uniqueness

High-High
Special Collections
Rare books
Local/Historical Newspapers
Local History Materials
Archives & Manuscripts
Theses & dissertations

High-Low
Research & Learning Materials
Institutional records
ePrints/tech reports
Learning objects
Courseware
E-portfolios
Research data
Prospectus
Institutional website
All institutions: shift to licensed
All institutions: manage transition from print?
Licensed channel providers: consumer, education, scholarly, ..

Research institutions: managing institutional assets
Research institutions: new scholarly outputs
All institutions: learning materials
Growth in Coverage of University of Illinois-librally-owned Titles in HathiTrust

- June
- July
- August
- September
- October

- 784,796 titles
- 9.3 miles of library shelving

= 20% of X library holdings
Given ubiquitous digital access
robust digital preservation guarantees
relative abundance of alternative print supply

where should X focus library resources?
preservation priorities . . . delivery portfolio

N = 784,796 titles
Distribution of print holdings reflects:

scale of scholarly attention (research v. teaching)
scope of intended audience

'The canon'
Core secondary works
Scholarly editions
Specialist & research monographs

Audience

>100 libraries
>25 libraries
25-100 libraries

Attention

Broad
Narrow

Pedagogical

Scholarly
... suggests potential redistribution of print inventory to support post-digitization access and preservation requirements

Source print delivery with network provider?

Retain as local asset? .. or 10 or 5 or ?

>100 libraries

<25 libraries

25-100 libraries

Shared research collection, regional consolidation?

Choices?
library trends: scaling and sourcing
If this trend continues library allocations would fall below 0.5% by 2015. Growth in for-profit sector, concerns about infrastructure costs in the ‘middle’ and budget issues in the research sector all support this trend.
Unbundling the corporation

John Hagel III and Marc Singer

The forces that fractured the computer industry are bearing down on all industries. In the face of changing interaction costs and the new economics of electronic networks, companies must ask themselves the most basic of all questions: what business are we in?

Core components of a firm

- **Customer Relationship Management**
  - Attracting and building relationships with customers
  - “Service-oriented”, customization
  - Economies of scope important

- **Product Innovation**
  - Develop new products and services and bring them to market
  - Speed/flexibility important

- **Infrastructure**
  - Back office capacities that support day-to-day operations
  - “Routinized” workflows
  - Economies of scale important
Libraries

- Provision of study & social spaces
- Interpret learning and research needs
- Personalized research assistance
- Marketing and assessment
- Customization/personalization

Acquire/develop new information resources and services to support evolving research and learning workflows

- Physical space,
- Physical inventory,
- Repository
- Systems infrastructure
- Online services, etc.

Customer Relationship Management

Product Innovation

Infrastructure
Customer relationship management

• Important for all to hold onto?
• Various levels
• Local customization

• Analytics: data driven engagement
  – Fragmented
Research libs

- **Resources.** Libraries that support doctoral education
  - <20% US academic libraries but account for ..
  - >50% library spending and ...
  - >75% of expenditures on information resources.
- **Digital infrastructure.** Institutional research and learning materials. Institutional records.
- **Preservation mandate.** Comprehensive collections.
  - Seeking collaborative solutions for journal literature (Lockss, Portico), collective legacy print collection (HathiTrust?), and digital infrastructure.
- **Support for scholarly resources.**
  - Arxiv, ...
- **Support for digital scholarship**
Research: infrastructure challenge

- Print increasingly collaborative:
  - Collaborative arrangements for print
  - Collaborative arrangements for digital
- Licensed materials:
  - Reduce cost of management through private providers
- Institutional research and learning materials:
  - Selective investments; leave to others where appropriate
  - Search for collaborative solutions where possible
  - Customer relationship management becomes more important
- Systems infrastructure
  - Consolidation of traditional management environment
  - Selective local investment in digital infrastructure
  - Collaborative and third party cloud offerings
Libs in ‘convenience’ sector

• An infrastructure cost
• ROI
• Make learning more effective
• Focus on ‘packaged digital’ and integration with learning process
• Organizational integration with learning and student support
• Focused on institutional goals not on ‘community of libraries’.
‘Middle’ academic

- with the exception of a small number of very large research libraries, retrospective print collections will be managed as a pooled resource and physically consolidated in large regional stores
- 80% or more of library materials spending in the academic sector will be directed toward licensed electronic content distributed by large aggregators
- Strong downward pressure on costs will push towards library consolidation, more ‘instrumental’ resource sharing, and a move to outsourced services.
- Selective local engagement around creation and curation of scholarly and learning materials
## Scale

<table>
<thead>
<tr>
<th>Source</th>
<th>Institution</th>
<th>Group</th>
<th>Webscale</th>
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<tbody>
<tr>
<td>Peer (collaborative)</td>
<td>HathiTrust; DuraSpace</td>
<td>Orbis Cascade</td>
<td></td>
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<tr>
<td>Public (state/national)</td>
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<td>Jisc; OhioLink</td>
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<tr>
<td>Private</td>
<td>Locally procured systems and services</td>
<td>Worldcat Cataloging</td>
<td>Flickr Commons, Google Scholar</td>
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</tbody>
</table>
Obvious?

Alignment with mission of parent institution ... 
... in a network environment ... 
... and focus on costs ... 
... will continue to redraw the boundaries of the academic library.

No question is so difficult to answer as that to which the answer is obvious.

George Bernard Shaw
Thank you

Lorcan Dempsey

http://www.twitter.com/LorcanD
Http://www.oclc.org/research