OCLC's ENVIRONMENTAL SCAN AND ACCESS TO E-BOOKS THROUGH NETLIBRARY

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OCLC ENVIRONMENTAL SCAN

- **PURPOSE OF REPORT** :

  - Identify and describe issues and trends that are impacting and will impact OCLC, libraries, museums, archives and other allied organisations, positively and negatively

- **SCOPE OF REPORT** :

  - Examine the social, political, economic and technological spheres in which these organisations and their users operate
  - Identify main patterns in the information landscape and suggest some implications for its future

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- **CHANGE** :

  - Profound
  - Accelerating
  - Transforming
  - Unpredictable

- **EXAMPLE** :

  - Arthur D. Little report to OCLC Board of Trustees in 2000, did not mention Google.
  - Google has transformed the world we inhabit
  - Google is a major player in search technologies
  - Google has become a substitute for a visit to the library's reference desk

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- The Web has become the most significant engine driving changes that impact OCLC and Libraries.

- Libraries represent order and rationality. The process of searching for information in a library is done within highly structured systems. The librarian acts as a guide to help user navigate these systems.

- The Web is unstructured and disorderly. The process by which things are found is also disorderly. The user searches alone without expert help and, not knowing what is undiscovered is satisfied.

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- **CHALLENGE** :

    - How do we bring the world of the Library (order, rationality) and the world of the Web (disorder, anarchy) together ?

- Report examines five landscapes to identify and describe issues and trends that are impacting and will impact OCLC and Libraries :

    - Social
    - Economic
    - Technology
    - Research and learning
    - Library

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THE SOCIAL LANDSCAPE

The information consumer, who is comfortable in a virtual world is characterised by three major trends :

- ➢ SELF-SUFFICIENCY
- ➢ SATISFACTION
- ➢ SEAMLESSNESS

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- **SELF-SUFFICIENCY**
  - Information consumer operates in an autonomous way using search engines as gateways to both facts and answers eg Google, Ask Jeeves
    These have become self-service alternatives to traditional library reference services.

- **SATISFACTION**
  - Surveys confirm information consumers are pleased with the results of their online activities eg Outsell Inc 2002 : 78% of respondents said the open web supplies « most of what they need ».
  - Information on the open web is easier and more convenient to find and access than the information stored in libraries.

- **SEAMLESSNESS**
  - The world of the information consumer is seamless – the boundaries of work, play and study are gone.
  - Libraries are compartmentalised with separate spheres of information eg different computers must be used for different tasks (access to content, e-mail etc.).

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THE ECONOMIC LANDSCAPE

- Many countries face growing demands on services funded centrally

- Public funding for libraries will continue to decline or remain at low levels for several years

- Libraries must re-examine their internal resource allocations in an increasingly digital world

- Libraries must do a better job of demonstrating their value more explicitly to their funding agencies. They must track their return on investment to express their value to society at large

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THE TECHNOLOGY LANDSCAPE

- Trends suggest that we are headed into a period of significant technology change.

- Increased investments in technologies and standards that will allow libraries to bring structure to unstructured and uncatalogued data such as historical photographs, research notes.

- Move towards lower cost open source software will enable organisations to bring solutions and services to market faster and cheaper.

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THE RESEARCH AND LEARNING LANDSCAPE

The trends in this landscape have a great effect on libraries

- Proliferation of e-learning : e-learning has a presence in an ever-increasing number of college and university courses.

- Lifelong learning in the community : libraries are a necessary part of lifelong learning activities. The emergence of lifelong learning as an important political agenda challenges libraries to show they add value and are central to these learning programmes.

- Changing patterns of research and learning : systems of scholarly communication and learning are being transformed eg academics are publishing formally on their own web sites, in digital archives or in institutional repositories. Role of library in these new processes is still unclear.

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THE RESEARCH AND LEARNING LANDSCAPE

- Different perceptions of value
  - Scientists
    - Google
    - Yahoo
    - PubMed
  - Librarians
    - Science Direct
    - ISI web of science
    - MedLine

Carefully selected resources librarians make available to our academic communities are being undervalued in favour of freely accessible resources we know are not of the same quality.

Convenience vs buried away on library web site.

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THE LIBRARY LANDSCAPE

- Many librarians and highly trained information professionals will retire in next 5-10 years. Loss and opportunity.

- Necessary to fill these positions or reallocate funding to new non traditional positions eg digital scholarship, open source projects as libraries respond to new demands for e-learning programmes etc.

- Librarians assume libraries will always be funded. The funding agencies won't support endeavours they can't see.

- It is still the case that most library users must go virtually or physically to the library. Library content and services are rarely pushed to the user.

- Increasing need for libraries to interconnect with non-library systems such as campus portals.

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THE LIBRARY LANDSCAPE

- Librarians need to stop looking at things from a library point of view and focus on the users' view.

- Librarians can't change user behaviour and so need to meet the user.

- Users want :
  - 24/7 services access 'retail expectations'
  - Easy straightforward access to desired information. Five clicks of the mouse to obtain what they want

- Libraries need to :
  - Respond to the above and
  - Bring the collective wealth of libraries to the attention and desktop of the information consumer

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OPEN WORLDCAT PILOT

- Partnership with Google search service to make a subject of 2 million abbreviated records from WorldCat – the OCLC database- available on Google, with links to the Web-based catalogues and sites of some 12,000 academic and public libraries in the USA.

- In this pilot an information seeker who starts a search using google could end up finding the items he needs in a nearby library.

- A Google search can retrieve records from WorldCat labelled 'find in a library'. User clicks on this and taken to the web site of the library concerned.

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OPEN WORLDCAT PILOT

- OCLC is currently evaluating the results of the pilot which ended recently.

- An excellent example of :
  - Bringing the collective wealth of libraries to the attention and desktop of the information consumer using his/her preferred search engine.
  - Weaving libraries into the Web and the Web into libraries.

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NETLIBRARY

- Bringing quality e-book content selected by librarians to the attention of users wherever and whenever they want it.

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Topics

- Background to netLibrary
- OCLC and netLibrary
- Key benefits for users and librarians
- The netLibrary collection
- Access, authentication & usage
- Recent enhancements & future developments
- Tools for the librarian
- Pricing model
- Selecting titles and ordering

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Who is netLibrary?

- The leading provider of electronic books to the institutional library market

- Founded in August 1998, netLibrary is located in Boulder, Colorado

- OCLC completed the purchase of netLibrary assets in Jan. 2002

- A new division of OCLC

- A single interface to search and read more than 70,000 eBook titles from more than 480 commercial and academic publishers

- Serves more than 7,000 academic, public and special libraries worldwide

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Why netLibrary and OCLC?

- 9,000 OCLC member libraries around the world want to add eBooks to their reference collections

- eBooks will be integrated into other OCLC services – OCLC MARC21 records available as collection sets, links from FirstSearch WorldCat database

- eBooks fit into the OCLC approach to information and knowledge management

- Financial stability - OCLC is a trusted 3rd party -not-for-profit membership and research organisation

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Why netLibrary, Why eBooks?

Library Challenges

- Changing user needs
  - Changing lifestyles (24/7), learning styles
  - Support distance, e- and distributed learning
  - Remote preference
- Increasing demand for electronic resources and services
- Shrinking budgets

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What is a netLibrary eBook?

- An enhanced electronic version of a print book
- Accessible anytime/anywhere via the internet
- Requires no specialized hardware or software – Standard Web browser
- Accessed on a one-user/one-book model

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Benefits of eBooks for libraries

netLibrary provides services to support librarians' expanded role in the digital age

- Reducing or eliminating costs associated with printed books - no storage costs or costs associated with replacing lost, stolen or damaged stock

- No physical space requirements
  - Libraries can add titles to existing collections without expanding or opening costly new storage facilities

- eBooks are checked-in automatically
  - no re-shelving
  - no administration of reminders and overdue fees

- New eBooks quickly added
  - Available within 72 hours of order being received

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Benefits of eBooks for users

- Global, anytime accessibility - 24/7 access to eBooks from anywhere in the world

- Instant access to "my" netLibrary - a personalised view on the collection, offering immediate access to reading list textbooks, standard reference works, handbooks, manuals, etc

- Powerful flexible searching - within a book and across an entire eBook collection

- Links to other resources, including dictionaries

- Accessible using standard Web browsers - no special devices required

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The netLibrary Collection

- Total – 70,904

- Copyright titles – 67,497
  - From more than 480 commercial and academic presses
  - netLibrary works with libraries to select and develop their customized collections

- Public Domain titles – 3,407
  - Public Collection – free, out-of-copyright eBooks,
  - including classic works of fiction, speeches, government reports…

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netLibrary Collection Development

- Select, organize, and provide access to audience-specific content
  - Academic
  - Public
  - School
  - Special

- U.S. publishers initially, increasing emphasis on International publishers

- Provide depth and breadth of quality content

- Focus on most desired subject areas and leading publishers

- View netLibrary Collection Development Policy
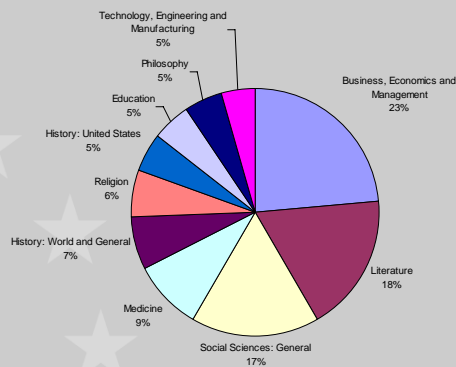 www.netlibrary.com/about_us/academic/collection_development_policy.asp

The netLibrary collection - Top 10 subjects

Top Ten Subjects in netLibrary Collection

- Technology, Engineering and Manufacturing 5%
- Philosophy 5%
- Education 5%
- History: United States 5%
- Religion 6%
- History: World and General 7%
- Medicine 9%
- Social Sciences: General 17%
- Literature 18%
- Business, Economics and Management 23%

netLibrary Publishers - 480

- Commercial include:
  - McGraw-Hill
  - Taylor & Francis Group
    (including Routledge)
  - Wiley
  - Kogan Page
  - Sage
  - Blackwell Publishers
  - Blackwell Science
  - Kluwer
  - Butterworth-Heinemann

- Academic presses include:
  - Oxford University
  - Cambridge University
  - University of Wales
  - Edinburgh University

- plus many U.S. university presses
  - Yale
  - MIT
  - Harvard Business School

http://www.netlibrary.com/about_us/publishers/publisher_list.com

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netLibrary collection growth

- 14,000+ titles from 100+ non-U.S. publishers
- 50-60 new publishers per year- currently adding approx 2,000 titles per month
- Main area of growth – Business, Economics & Management, Social Sciences and Health & General Medicine
- Increasing addition of front list content:

  2001- 40% frontlist

  2003 – nearly 90% frontlist

Connecting to netLibrary

- Through a library web page
  - Link to http://www.netlibrary.com
  - Direct links to individual titles
  - Your page can include explanatory text and links to a FAQ, demo and QuickStart guide

- Through WorldCat (FirstSearch)

- Direct link links to individual titles from your OPAC
  - By integrating eBook MARC records into your catalogue
  - MARC records are supplied by OCLC
    - Included in the netLibrary access fee
  - OPAC access can dramatically increase eBook usage

Access models

- Publishers & netLibrary control
  - Number of simultaneous users for each book
  - netLibrary model = one-ebook-one-simultaneous-user
  - Publishers beginning to explore other models
    - Multiple/Unlimited simultaneous use
    - Rent/Leasing - print/pay-per-view
    - Desegregation - chapters

- Libraries control
  - the number of eBooks that each user can check out
  - the length of 'loan'/check out periods

Usage Data
Patron Time in the Book

- **Data very preliminary**
  - **Patrons move around the netLibrary site**
  - **Patrons move around the library's site**
  - **Patrons move in and out of Internet sites**

- **Average session length: 10 - 20 mins**

- **Average time in a e-book : 11 mins**

- **Implications**
  - **Reinforces use as a research and reference tool**
  - **Patrons are not "leisure reading"**
  - **Robust search capability, plus links in Table of Contents and Index speeds time to finding desired information**
  - **More research required**

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Authentication

- **Institutional**

  - netLibrary will recognise users' affiliations in order to log them in to the correct collection and branded web site

  - IP address or referring URL

  - Users connecting from an authenticated IP address or referring URL can create a personal account

  - This allows them to search, browse and check-out, save lists of favourite titles and add book marks and notes

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User Functionality

- Search by Title, Author, Subject (LCSH), Keyword, Full text, Publisher, Publication Year, ISBN
  - Full text searching across whole collection or within one eBook
- List by title
- Sort results by word occurrence, author, title, publisher, publication date (asc. or desc.)
- Browse or check-out an eBook
- Add Bookmarks and Notes
- Quick access via "My Favourites"
- Copying: One page at a time using browser print functions; normal copyright rules apply.

Recent Developments

- netLibrary interface now available in French, Spanish and simplified Chinese

- FirstSearch Integration

- Coming
  - Spanish and French Language Content
  - Siglo XXI, Editorial Paidotribo
  - Editions la Découverte
  - E-thèque
  - Editions du Nouveau Monde

Library Resource Center

http://www.netlibrary.com/resourcecenter

Administration
- User accounts, default search preferences & security levels
- eBook categories and check out periods
- User check-out limits

- **Reports**
  - Usage reports - Popular eBooks, turn-away statistics etc.
  - Collection reports – Owned, not owned, new eBooks etc.

- **Title*Select*™** http://www.netlibrary.com/titleselect/
  - Search netLibrary's online catalogue and select titles for your eBook collection

- **eBook Toolkit** http://www.ebooktoolkit.com
  - Integrate and promote your collection

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Purchasing models

Individual collection
- 100 titles/copies minimum start up order
- Additional copies/titles can be added at any time in any quantity

Shared collection
- Each library contributes minimum 100 titles/copies - A single
- institution can access both a shared and individual collection –
- Additional copies/titles can be added at any time in any quantity

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Pricing - Content

- The eBook price is determined by the publisher of the content

- The majority of eBooks are the same price as the hardcopy book

- Minimum initial order = 100 eBooks - not necessarily unique titles eg 80 titles but with some multiple copies

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Pricing

Content	Based on publisher-specified retail pricing
Content Support Services	
a) **Prepaid Ongoing Access**	55% of retail price of the content purchased **Payable at time of purchase**
b) **Annual Service Fee**	15% of retail price of the content purchased Payable at time of purchase and annual on the anniversary of the purchase
Conversion from Annual To Prepaid	Fees based on prorated recognition of annual fees previously paid

- If a library stops paying the annual access fee, netLibrary will provide a CD of the e-books it
has purchased.

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Access Fees Cover

- Hosting, serving, and providing library and user access to the eBook content purchased by a library, including the management of additions and deletions to the library's collection(s) on an on-going basis.

- Use of the netLibrary search functionality, with upgrades that netLibrary may choose to implement.

- OCLC eBook MARC records for all titles purchased

- Access to Houghton Mifflin American Heritage Dictionary, 4th edition in all eBooks purchased

- Access to Library Resource Center, including reporting functionality and the eBook Tool Kit for training, marketing and promotional support

- Access to online collection development, acquisition, and deselection tools

- Librarian and User Support

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Selecting Titles and Ordering

- Title*Select* ™ http://www.netlibrary.com/titleselect
  - Assess the collection, select & submit title lists
    - Search the entire eBook catalogue
    - Browse predefined collections developed by netLibrary
    - Create, save and share title lists
    - Submit your collection list for order processing

- netLibrary public web site http://www.netlibrary.com
  - View 10 free titles through the Reading Room

- Sign agreement and provide authentication information

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Further information

- **netLibrary web site** :

  http://www.netlibrary.com

- **OCLC Environmental Scan** :

  http://www.oclc.org/info/escan/default.htm

  - Order print version : $ 15.00

  - View web version of the report

  - Download a high-level summary in English, Spanish, French and Portuguese

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OCLC PICA Contacts

- Advice and guidance on pricing, selecting titles and ordering

  - Southern Europe
    Nick Rawson, n.rawson@oclcpica.org
    Philippe Martin, p.martin@oclcpica.org

- Support for interface and administrative functions, all regions

  - *Simon Day*, Senior Product Specialist, s.day@oclcpica.org

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