

Members Council February 2003

Interest Group

Discussion Summary Report

Name of Group Global Librarianship (joint meeting with Resource Sharing)

Recorder George Needham

1. Summary of topics & discussions

Barriers to cross border resource sharing

Current state of affairs regarding ILL and new barriers:

- social/cultural
- technological
- legal and financial

How can we overcome these barriers?

What should OCLC be doing to support cross-border resource sharing?

Two presenters:

Bob Seal: Former job at University of TX El Paso, where there were faculty needs for materials from Mexico. Worked with US Embassy Lib in Mexico City for pilot project in 1989. It is still continuing 20 AMIGOS libraries 12 Mexico City libraries. Problems encountered: 1. Fear that materials would be lost. Solved by using embassy courier from Laredo. Few items lost. Initially required that materials must be in lib use only. 2. Fear of an overwhelming number of requests because of imbalance of collections. Pilot started with non-scientific materials only. 3. Concern about cost of handling requests, which were more labor intensive, & outside usual workflow. Charged a minimal fee of \$.50 with a deposit account at UTEP.

Albert Simmonds: of OCLC, LRM: DRM for libraries (Library rights management)

His main area is cataloging & metadata within a new unit Registry & Metadata services. Looking at the problem of infrastructure that isn't there for rights management.

OCLC working on two business plans: OCLC will be ISTC registration authority International Standard Text Code which is a new identifier, pre-ISBN/ISSN, for the Work, not the manifestation of the work. ISTC will link all the manifestations together. It will be easy to access both metadata & identification and supports the FRBRization of WorldCat.

2nd business plan: Hosted service at OCLC to manage library's rights to materials, rights to the content of journals, print or electronic.

Discussion points listed below in #2.

2. List 3-4 significant issues that the group wants to communicate to Members Council and OCLC.

- Negotiate ILL rights
- Know what's been licensed
- Use of Table of Contents to identify needed content
- Encourage broader use of ILL Fee Management (IFM) system to ease currency exchange/paperwork issues

RIGHTS MANAGEMENT

- Electronic licensing
- Availability of technology
- **Negotiate ILL rights**
- **Make sure ILL people know what's been licensed**
- Electronic dissemination a First World phenomenon
- Prospero software provides temporary access to people outside institutions
- Lack of monographic material available electronically -- major issue for Public Libraries
- **Use of Table of Contents to identify needed content**
- When will WorldCat have this info?

- ILL still predicated on library to library, not end-user
- Time out of building/off campus
- Load sharing/appropriate distribution of requests -- recognizing existing arrangements
- Interest among librarians -- concerns about materials leaving borrowing libraries
- Flow is often reverse of what is expected: small libraries to bigger libraries
- Who is actually setting these policies in libraries?
- Limited ability to ILL electronic materials -- depends on what's been negotiated
- ICOLC as clearinghouse of info on what's been agreed to where (licensing information that publishers have agreed to for other sites)

INTEREST IN CROSS-BORDER ILL WITH MEXICO?

- Flow has been U.S. to Mexico
- Mexican librarians don't expect U.S. librarians to request materials from them
- ANALOGY: Increased demand on South African libraries since materials loaded to WorldCat
- Customs barriers between U.S. and Canada

OCLC's role in reminding directors and ILL staff of these opportunities:

- **IFM system -- eases currency exchange/paperwork issues**
- Reciprocal arrangements -- Global Group Access Capability: "Global Sharing Program"
 - sign up on web <<http://www.oclc.org/oclc/groups/gac.htm>>
 - about 60 members currently
- Can OCLC facilitate one-to-one arrangements -- similar interests, complementary collections? New OCLC ILL Policies & Technology Directory might be a start

Day 2 Discussion Summary Report

Name of Group **Global Librarianship**

Recorder **Nancy London**

Consortia discussion – types, purposes, barriers and opportunities, relationships with OCLC.

Asia

In Japan there is a movement to build consortia between academics. The primary interest is Beijing for ILL infrastructure. Recently many universities are buying massive accounts of e-content databases strictly for purpose of procurement. Consortia that transcend regional boundaries have not yet fully happened even with and between libraries. There is some domestic international regional movement as Wasada is working to encourage this. Overall, Asia has rapid transfers of students so it makes sense for libraries to work together.

Africa

South Africa has a southern academic regional consortia funded by the Mellon foundation for collection development of e-materials. It is modeled after British model. ILL is strong in South Africa with a national union catalog (SACAT), which facilitates ILL. The government established it 12-13 years ago to facilitate ILL. We built ILL on DRSS software SiteSearch.

Mexico

CONPAB consists of 40 public institutions from most states. There is a recent push on accreditation to bring libraries up to standard. It may mean ILL will demonstrate a way to get materials. It is also used for contracting.

Eastern Europe

FirstSearch group includes Hungary, Lithuania, Latvia, and Poland. Eastern Europe has zero dollars and won't become a market over night.

Turkey

8 institutions have fixed fee for ECO and eBooks.

Consortia

Many consortia have long histories but they differ in arrangement, number of services, and dollars. Consortia in U.S. look for consortia dollars but not all the same. However, OCLC Members Council reveals there are opportunities to get lower costs if libraries band together. The group would like to have OCLC to create consortia to bring costs down.

Some cost numbers are public if it is a public institution otherwise details of the deal are not public. Access to e-copies across consortia/libraries is cheaper. OCLC needs to continue to pursue the formation of consortia to keep cost for libraries low.

FirstSearch has trouble with 3rd party content. They would like per search differential pricing for Wilson Abstracts A&I and RILM and are willing to pay more for these and other databases.

OCLC needs to communicate the "better deal" and "value" of the purchase. It is hard to know what a good deal is with publishing situations in flux. They are interested in bringing together pricing in a registry of consortia & pricing. They would have confidence that my prices are different based on elements PBS showed where each consortium can put weight on one element.

Network & vendor surcharges vary a lot so libraries also need to know the value the differences. Some shared information can be misleading.

NC Live has public libraries, public and private universities, and continuing education. They also have the advantage of some skilled negotiators. Some other states are subsidized by state and they handle negotiations.

ICOLC does gather this information and members are sworn to privacy as part of getting people to agree to participate. They also set standards on agreements/license terms. OCLC can make a global consortium. If OCLC is to extend globally then OCLC needs to be part of ICOLC.

Should OCLC play a role in supporting libraries in negotiations with providers? Typically libraries and consortium negotiate for entire unit with each provider. Most consortia are beyond buying only and have broader resources and purposes. OCLC could negotiate with other providers on behalf of other countries. OCLC is a facilitator with consortia and other entities across the world. Pica is good example in affiliation role with other entities around the world. OCLC does price based on local environment.

EIFL, Electronic Information for Libraries <http://www.eifl.net/> – Arnold Hirshon is consultant for and network director. They are taking a long-term investment view. OCLC needs to help further this effort.

Interlibrary Loan international

Are there reasons to promote the role of ILL across borders? Is there a need for expansion of ILL cross-border? Canada has some customs issues. OCLC needs to help with a legislative arm to facilitate US/Canada cross border ILL. This is a legitimate role for OCLC to facilitate. Mexico/US ILL avoids physical customs process. Typically, AMIGOS facilitates via the embassy to share resources. AMIGOS also has a courier service for TX, AK, OK. There is a preferred courier within South Africa. Often there is need for physical delivery in US as well. Some use DHL, UPS, Postal, etc. between countries. Pica is building a system for libraries in Germany/Netherlands.

OCLC can help to facilitate discovery of the physical issues with delivery of items. Could OCLC pursue this with IFLA, ALA? It would help streamline local issues and customs. .

Will new ILL system instruct users in how to get physical item? OCLC could be Amazon-like with select shipping/delivery mechanism then IFM will help with exchange of dollars. OCLC will come up with preferred carriers then the requesting library would choose and know the cost they are willing to pay.

Physical delivery couriers are unaffordable in Latin America and the Caribbean. They can deal with non-returnables or find a local channel to keep dollars down.

Any ILL materials exchanged Japan to US? There is an ARL Japan project. US & Japanese libraries ILL takes place within this framework. Also, Wasada has mechanism in WorldCat and as a result receive direct request from libraries to libraries. Are there reasons to promote ILL US/Japan and for it to grow? Yes, as long as there are readers in world, they will be interested in reading all kinds of books. It would be great to have OCLC facilitate ILL & delivery.

Alternative to ILL

Books on Demand (out of copyright books) digitize the book and deliver the digitized version printed in e-form.

Message to Executive Committee & Members Council on top 3-4 issues:

- Look into netLibrary e-books being loaned to another country as an ILL fulfillment. Evaluate and explore the ILL fair use principles of netLibrary e-books.
- Support OCLC's policy of fostering consortia and consortia agreements. Many consortia at international level, example UNESCO. Most have neutral programs, policies, also have databases, OCLC needs to be aware of the various opportunities.
 - OCLC take into consideration local economy within each country. With OCLC content be more flexible in varying per search rates by content provider.
 - Wilson Abstracts
 - RILM
 - MLA
 - WorldCat per search
 - US other per search

Recommend OCLC move for relationship with

- ICOLC
- eIFL, Electronic Information for Libraries