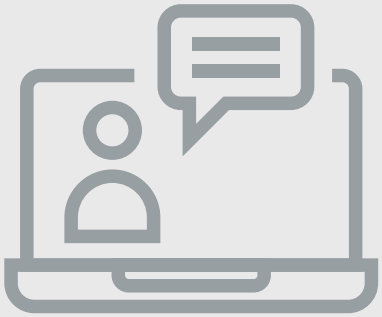

OCLC
Unlocking the future of e-resource management

1.0



Introduction

Libraries have undergone a profound transformation over the past two decades. The shift from print to digital collections has reshaped how libraries acquire and deliver content, engage with users, and align with institutional goals. In 2025, libraries are approaching an inflection point in their digital evolution, shaped by AI innovation and shifting global priorities. Budgetary constraints persist, even as digital collections dominate; open access (OA) becomes central to scholarly communication, and the complexity of managing electronic resources continues to grow. Complicating matters further is the recent surge in self-published and AI-generated materials flooding digital platforms, placing significant new curatorial and quality assurance demands on already-stretched library staff. Users now expect seamless discovery across increasingly hybrid collections while institutions demand measurable ROI from every technology investment. The question for library leaders is no longer whether to transform e-resource management, but how to do so strategically while preserving service quality and demonstrating institutional value.

This report builds on the foundation laid by OCLC's earlier publications, **Meeting the e-Resources Challenge (2013)** and **Continuing to Meet the e-Resources Challenge (2017)**, which explored the evolution of e-resource workflows and the need for integrated, scalable solutions. Those reports highlighted challenges like siloed systems, manual metadata management, and increasing demand for user-centered access. While these challenges still continue, the landscape has changed significantly since 2017. This report responds to a landscape shaped by rising complexity and constrained budgets. It outlines how shared infrastructure and collaborative workflows can deliver measurable ROI, reduce duplication, and support strategic priorities
across institutions.

Discovery must be intuitive, access seamless, and analytics-actionable

Libraries today aren't just managing e-resources to meet demand. They're designing experiences that anticipate discovery, streamline access, and support scholarly workflows. Discovery must be intuitive, access seamless, and analytics-actionable. The rise of hybrid collections, the mainstreaming of OA, and the blending of subscription and open models call for a new strategic approach. This approach positions libraries as proactive partners in research, teaching, and innovation.

Recent findings from OCLC Research confirm this shift. The OCLC Research Open Access Discovery project[1] shows that users actively seek scholarly, peer-reviewed open access (OA publications), but they are not very easy to search for or access. In response, library staff are integrating OA content into users' discovery workflows

[1] Faniel, Ixchel M., Brittany Brannon, Lesley A. Langa, Brooke Doyle, and Titia van der Werf. 2024. Improving Open Access Discovery for Academic Library Users. Dublin, Ohio: OCLC Research. https://doi.org/10.25333/4xem-xr80.

via learning management systems, reading lists, and browser extensions, while advocating for better metadata standards and system interoperability. These efforts reflect a broader transition as libraries move from purely supporting OA publishing to ensuring and enabling OA discovery.

This third report in our **'Managing e-Resources'** series presents a strategic framework to help libraries navigate this transition. It draws on emerging technologies, evolving user behaviors, and the capabilities of **WorldShare® Management Services (WMS)**, a platform designed to simplify e-resource management, unify workflows, and support evidence-based decisions. From **metadata supply chain resilience and persistent identifiers (PIDs)** to **AI-enhanced discovery and linked data**, this report offers two things: First, a practical playbook you can run now, and second, a shared roadmap for the next 12 to 36 months that prepares discovery and access for what comes next.

Here is how the report is organized so you can move quickly from context to action:

Section 2 — Strategic trends shows what has changed and why it matters now: from the rise of OA and transformative agreements to hybrid licensing, analytics, metadata infrastructure, and automation.

Section 3 — Metadata as infrastructure explains the operating backbone that makes those trends manageable, showing how discovery, access, and measurement depend on consistent identifiers, current holdings, and clear rights.

Section 4 — Practical solutions turns the argument into workflows you can run today, including integration of OA, managing your knowledge base and central index, applying title-level licensing in mixed packages, using AI-assisted enrichment to reduce duplication and improve records, and relying on analytics that reflect reality.

Section 5 — The roadmap looks ahead, aligning partnerships and investments so improvements persist and scale through better article-level.

2.0

Strategic trends in e-resource management

Electronic resource management is no longer a secondary function. It has become a strategic capability that supports institutional goals, user engagement, and the visibility of research. Libraries are adapting to a landscape shaped by OA publishing, hybrid licensing models, data-informed planning, and emerging technologies.

Governance must align procurement with teaching and research priorities while preserving affordability and discoverability.

Open Access: From advocacy to infrastructure

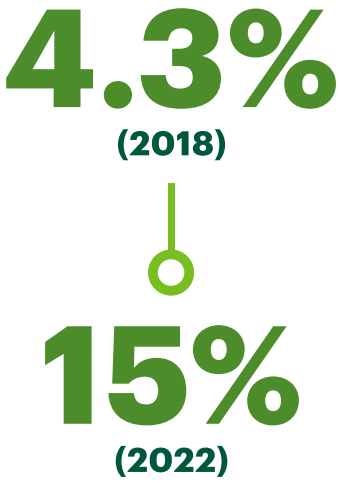
OA has matured into a core component of scholarly communication. Libraries have moved beyond simply promoting OA; they are now embedding it into systems, workflows, and service design. Findings from **OCLC's Open Access Discovery project**[2] shows that users actively seek scholarly, peer-reviewed OA publications, but they are not that easy to search for or access. Indeed, despite users not knowing much about OA, searching for an OA version was their most common response when they encountered a barrier to accessing the full text of scholarly, peer-reviewed publications. As a result, libraries in the study were already integrating OA into discovery platforms and learning management systems and reading lists, but indicated a desire to expand efforts to increase users' OA awareness, knowledge, and engagement. They also sought to up their work with other stakeholders to improve metadata standards and interoperability. As a result, those libraries reported measurable gains in OA publishing output, improved cost transparency, and stronger alignment with institutional research goals. At the same time, the report underscores that libraries lack direct, shared metrics for "discoverability," and still rely on proxies such as citations and views/downloads, which are fragmented across systems. Consequently, increased staff calls for centralized, comparable usage data and metrics were also highlighted.

Transformative agreements are accelerating this shift. These are contracts between academic institutions and publishers that shift costs from traditional journal subscriptions to OA publishing. Often called **'Read and Publish'** agreements,

[2] Faniel, Ixchel M., Brittany Brannon, Lesley A. Langa, Brooke Doyle, and Titia van der Werf. 2024. Improving Open Access Discovery for Academic Library Users. Dublin, Ohio: OCLC Research. https://doi.org/10.25333/4xem-xr80.

they bundle a library's existing subscription budget with funding for OA article publishing, enabling researchers at participating institutions to both access a publisher's portfolio of journals and publish articles openly without paying individual **Article Processing Charges (APCs)**. Between 2018 and 2022, the proportion of OA articles in hybrid journals increased from 4.3 percent to 15 percent, with nearly 60 percent of those articles made available through transformative agreements.[3] As more libraries adopt these models, transformative agreements are becoming a key mechanism for scaling OA across disciplines and regions.

For institutions managing flat or declining budgets, by shifting subscription spend into open publishing, institutions are not only reducing APC burdens but also reinvesting savings into collaborative metadata enrichment and shared analytics.



60% Nearly **60% of OA hybrid journal articles** came via transformative agreements

Hybrid models and licensing complexity

As OA publishing gains momentum, libraries are increasingly managing collections that span a mix of access models. Hybrid journals, transformative agreements, and bundled publisher platforms have created a landscape where subscription and open content coexist, often within the same title, issue, or collection. This convergence has introduced new licensing complexities that require libraries to rethink how they negotiate, track, and deliver content.

Hybrid publishing models present both opportunities and challenges. On one hand, they allow institutions to support faculty publishing in high-impact journals while expanding access to open content. On the other, they complicate licensing workflows, especially when terms vary across articles, collections, or regions. Libraries must navigate embargo periods, reuse rights, and shifting publisher policies, all while maintaining a seamless experience for users.

[3] Jahn, N. (2025). "How open are hybrid journals included in transformative agreements?" Quantitative Science Studies, 6(1), 242–262. https://doi.org/10.1162/qss_a_00348

To manage this complexity, libraries are turning to systems that centralize license data and integrate it with discovery and access workflows. **WorldShare License Manager** enables staff to track license terms, manage entitlements, and automate access controls across formats. This reduces manual effort and ensures that users encounter consistent access experiences, regardless of whether content is open, restricted, or part of a hybrid bundle. Discovery platforms also play a critical role. **WorldCat® Discovery** allows libraries to surface open and licensed content side by side, using metadata and license information to guide users to the best available version. This is especially important in hybrid environments, where duplicate records, inconsistent metadata, and unclear access rights can lead to confusion or missed opportunities.

Ultimately, managing hybrid collections is not just about negotiating contracts; it's about designing infrastructure that supports flexibility, transparency, and user trust. Libraries that invest in integrated licensing workflows and metadata-driven discovery are better positioned to navigate the complexity of hybrid publishing and deliver meaningful access to their communities.

Analytics as a planning tool

Libraries are experiencing pressure to demonstrate value, align with institutional goals, and make evidence-based decisions. In this environment, robust analytics are vital for effective e-resource management. Strategic planning, budget justification, and service optimization all depend on understanding how resources are used, by whom, and to what effect.

Standards such as **COUNTER Release 5.1** provide more precise metrics, particularly for OA content, including clearer definitions of access types and improved tracking across formats. These updates allow libraries to measure engagement with OA materials more accurately and compare usage across platforms. However, COUNTER data alone does not tell the whole story. Libraries need tools that combine standardized usage reporting with local insights to reveal patterns of discovery, access, and engagement.

Integrated procurement, access, metadata, and usage analytics within a single platform should serve as a baseline for benchmarking, learning, and scaling success.

OCLC's analytics suite addresses this need directly. **Choreo Insights®** helps libraries assess collections in relation to peer institutions by using **WorldCat** holdings data to align academic library collections with institution focus areas, new curriculum priorities, and future trends. **WorldShare Reports** and **Report Designer** offer customizable dashboards that track acquisitions, metadata activity, and usage trends across formats. **EZproxy® Analytics** adds another layer by capturing authentication-based access data, enabling libraries to see how different user groups interact with licensed and OA resources.

Together, these tools empower libraries to move from assumption to evidence, turning data into actionable intelligence. With integrated analytics, e-resources can be managed not just as a cost center but as a strategic asset, supporting institutional priorities and ensuring sustainable, user-focused access.

Metadata infrastructure and interoperability

Metadata is the foundation of modern library systems. It powers discovery, enables access, supports analytics, and ensures interoperability across platforms. For libraries managing increasingly complex digital collections, metadata quality is a strategic asset. Without consistent, scalable, and transparent metadata, even the most valuable resources risk being invisible to users and disconnected from institutional workflows. OCLC's infrastructure is built to meet this challenge. The **WorldCat knowledge base** connects holdings, licenses, and access points across systems, enabling libraries to manage e-resources efficiently and collaboratively. It is enriched by publisher data and maintained cooperatively by thousands of libraries, making it one of the most comprehensive, up-to-date and vendor-neutral metadata ecosystems available. This shared infrastructure supports full-text linking, MARC record delivery, and real-time updates across services like **WorldCat Discovery** and **WorldShare Collection Manager**.

A centralized knowledge base remains critical to discoverability, license management, and metadata enrichment.

Persistent identifiers such as DOIs, ORCIDs, and RORs are essential to this ecosystem. They allow libraries to link content across platforms, track usage, and support interoperability with external systems.[4] [5] OCLC integrates these identifiers into metadata workflows to ensure resources are discoverable, citable, and connected to broader research networks. **Linked data** is also transforming how libraries structure and share metadata. Through WorldCat Entities, libraries can create semantic relationships between works, authors, institutions, and events. These connections improve discovery, support AI-driven enrichment, and prepare libraries for future metadata environments where machine-actionable data will be essential. OCLC's linked data services, including **Meridian®**, are designed to help libraries transition from MARC-based cataloging to scalable, interoperable metadata workflows. **WorldShare Lexicon®** complements this transition by enabling libraries to collaboratively manage authoritative metadata for electronic collections. By standardizing terminology and linking local and global vocabularies, Lexicon improves metadata consistency, enhances discovery across platforms, and supports multilingual access, making it easier for users to find and trust library resources regardless of language or system.

Due to the significance of metadata in the management of e-resources, Section 3 of this report delves deeper into how to build a resilient metadata supply chain.

Automation and emerging technologies

As library collections grow more complex and user expectations rise, automation is becoming key to maintaining quality, consistency, and scale. Manual processes such as link checking, metadata cleanup, and access troubleshooting are no longer sustainable in environments where content changes frequently and discovery must be seamless. Libraries need systems that can adapt in real time, reduce friction for users, and free up staff to focus on strategic priorities.

Artificial intelligence is helping libraries meet these demands. OCLC's AI-powered tools are designed with libraries specifically for library workflows, with a focus on enhancing, and not replacing human expertise. For example, machine learning models are used to enrich metadata, eliminate duplicate records, and improve search precision across platforms.[6] These capabilities directly support discovery and access by ensuring that users can find accurate, complete, and current records, even as content changes rapidly.

[4] J McGill University Libraries Persistent Identifiers (PIDs) https://www.mcgill.ca/libraries/research-services/persistent-identifiers-pids
[5] Washington University Libraries Persistent Identifiers https://library.wustl.edu/research-support/scholarly-and-digital-publishing/persistent-identifiers/
[6] Linked data - The next evolution of library metadata | OCLC https://www.oclc.org/en/linked-data.html

Link reliability is another critical area where automation makes a difference. Broken or outdated links can undermine trust and disrupt research workflows. Through **WorldShare Collection Manager** and the **WorldCat knowledge base**, OCLC provides automated link resolution and metadata synchronization. When publishers update access points or licensing terms, libraries receive real-time updates to MARC records and full-text links, reducing manual intervention and improving consistency across systems.

OCLC's approach to AI is grounded in purpose and guided by library professionals. Tools like **smart fulfillment** use machine learning to optimize interlibrary loan delivery speed, while **WorldCat.org's smart recommendations** enhance discovery by connecting users to relevant resources faster. These innovations are not off-the-shelf solutions, they are built with libraries in mind, ensuring that automation supports strategic goals such as access equity, metadata integrity, and operational efficiency.

Recent advances in AI-powered metadata enrichment further demonstrate this potential. AI-generated suggestions for subject headings and classification numbers have been introduced in **WorldShare Record Manager** and **Connexion**, helping catalogers enhance records with greater precision and consistency. OCLC has also continued to refine its machine learning models to detect duplicate bibliographic records in **WorldCat**, resulting in the removal of millions of redundant entries across formats and languages. These developments show how AI can improve metadata quality at scale, laying the groundwork for future applications in e-resource management where accuracy, discoverability, and interoperability are critical.

As AI continues to evolve, libraries will increasingly rely on it to scale services, reduce repetitive tasks, and improve user experience. OCLC's commitment to responsible, human-centered AI ensures that these technologies remain aligned with the values and needs of the library community.

Robust OA discovery, metadata resilience, and data-driven governance enabled by WMS and the WorldCat knowledge base are not mere enhancements; they are strategic imperatives that unlock sustainable, user-first access in hybrid and OA-forward environments.

3.0

Metadata as infrastructure

Metadata is the operational infrastructure

In 2025, metadata is not a back-office detail; it is the operational infrastructure that links how libraries select, describe, expose, license, deliver, and measure electronic collections. As hybrid models and OA scale, the systems library users rely on, including discovery layers, knowledge bases, indexers, resolvers, repositories, and research portals, depend on consistent, machine-actionable metadata to work together. When metadata is incomplete or inconsistent, users feel it as friction: missing results, ambiguous versions, broken links, or unclear reuse rights. Earlier OCLC reports in this series surfaced these workflow costs as libraries moved from print to digital; today the same issues are amplified by the volume and variety of content in play.

What the evidence says

Library metadata quality and consistency determines user outcomes; i.e. what they see, where they see it, whether they can act on it, and whether they trust it. Recent OCLC Research on OA discovery confirms that users most often start with major search engines, then disciplinary databases, with the library search page a close third, underscoring the need for library-curated metadata to travel to the places people already work, not remain confined to a single interface. **Yet only about a quarter of respondents found searching for OA "very easy,"** and the most common response to access barriers was to look for an OA version, a behavior that only works when versions are reliably identified and linked.[7] At the same time, user expectations are shifting rapidly: according to a recent HEPI/Kortext report, more than half of students had used generative AI for assessments as of February 2024. A subsequent HEPI/Kortext survey in February 2025 indicated a significant increase in student usage of generative AI tools, with updated statistics showing 92% usage, highlighting the growing importance of metadata that supports trustworthy discovery in an environment where AI-driven tools increasingly mediate research and learning.[8]

[7] Faniel, Ixchel M., Brittany Brannon, Lesley A. Langa, Brooke Doyle, and Titia van der Werf. 2024. Improving Open Access Discovery for Academic Library Users. Dublin, Ohio: OCLC Research. https://doi.org/10.25333/4xem-xr80.
[8] Higher Education Policy Institute and Kortext. 2025. "HEPI/Kortext AI Survey Shows Explosive Increase in the Use of Generative AI Tools by Students." HEPI, February 26, 2025. https://www.hepi.ac.uk/2025/02/26/hepi-kortext-ai-survey-shows-explosive-increase-in-the-use-of-generative-ai-tools-by-students/.

92% **92% of students** reported using generative AI for assessments in 2025

Moreover, library staff found that certain types of data greatly improve user experience. These include persistent identifiers like DOIs for works, ORCID IDs for authors, and ROR IDs for institutions, as well as details about peer-review status, licensing, and version type—such as whether the item is a preprint, an accepted manuscript, or the final published article. Including this information helps users see connections to related research, understand how materials can be used, and choose the version they need. It also enables systems to accurately remove duplicates and reliably link different versions of the same work.

The study highlights common pipeline gaps. Article-level metadata for OA titles is often incomplete. Harvesting and aggregation rules can be opaque. Labels sometimes confuse OA status or version. Closing these gaps turns OA policy into practice by making open versions visible alongside licensed copies and by ensuring that version and rights signals are clear at the point of need.

Bottom line: Metadata is the connective tissue of e-resources management. A resilient metadata supply chain is not just a technical necessity—it is a cost-saving strategy that reduces duplication, improves link reliability, and enables scalable enrichment across institutions.

From OA policy to practice

The most dependable way to keep OA and licensed content aligned is to register collections in a vendor-neutral knowledge base and ensure those holdings drive both your resolver and your discovery service's central index. With the **WorldCat knowledge base** as a single source of truth, provider updates such as title swaps, coverage changes, and URL moves propagate to discovery, link resolution, and MARC delivery without re-keying across systems. **WorldShare Collection Manager** then automates holdings registration and distributes

customizable records as subscriptions and OA collections evolve. OA can be surfaced in **WorldCat Discovery** with an open-content filter and prioritization of OA links, for example via Unpaywall, so legitimate open copies sit alongside licensed versions and users reach a usable PDF sooner, especially in hybrid journals. Libraries retain local bibliographic data and local holdings records for institutional nuance, while cooperative updates operate at web scale.

Automation and AI-assisted enrichment

At current volumes, metadata supply chain resilience requires automation that continuously improves quality as content and packages change. OCLC applies machine learning to tasks such as deduplication, link reliability, and search relevance, which reduces manual effort while staff maintain policy control. The **WorldShare Management Services** platform emphasizes responsible innovation, using AI where it strengthens discovery and fulfilment signals and verifying records against the network corpus. Linked-data investments, including **WorldCat Entities** and **OCLC Meridian**, move description from records to relationships. This enables machine-actionable context across works, persons, organizations, places, and events that improves tagging, record enhancement, and future enrichment, while keeping human review in the loop.

OCLC's AI-driven metadata enhancements already in use for bibliographic records (see above) illustrate the potential for scalable quality improvements. Recent work on large-scale record deduplication and predictive subject suggestions has demonstrated how AI can streamline cataloging and improve metadata precision. While these innovations currently focus on bibliographic workflows, they offer a compelling model for future applications in e-resource management, where metadata accuracy and interoperability are critical to discovery and access.

Analytics that assume good metadata

Evidence-led planning is only as good as the identifiers, holdings, and license terms underneath it. **COUNTER** and **SUSHI** provide comparable usage, but many decisions

also depend on how different groups authenticate and engage with resources and how local collections align with programs and peers. In practice, the WorldShare analytics stack brings these together. **WorldShare Reports** and **WorldShare Report Designer** provide integrated and custom reporting across acquisitions, e-resources, and usage. **EZproxy Analytics** adds authentication-based insight that reveals friction which usage alone cannot show. **Choreo Insights** situates holdings and usage in an external context, so collection decisions can track curricular and research priorities, not only cost per use. When metadata foundations are coherent—that is, persistent identifiers are present, holdings are current, and entitlements are accurate—analytics shift from accounting to strategy.

Turning supply-chain resilience into institutional resilience

A resilient metadata supply chain, shared where possible and local where necessary, does more than lower back-office effort. It stabilizes the user experience through clear OA and version signals, fewer dead links, and fewer duplicate records. It increases reach by meeting users where they search. It improves strategic alignment by connecting cost, use, and program priorities with confidence. The operational pattern is consistent with prior reports and current findings. Register OA and licensed collections in a cooperative knowledge base. Ensure article-level and version-aware description. Let entitlements and rights travel with records. Expose institutional outputs for harvesting by discovery services and aggregators. Measure selection, licensing, discovery, and access end-to-end so the numbers reflect reality. OCLC's networked infrastructure, combining **WorldCat** with the e-resource capabilities of **WorldShare Management Services**, exist to make that pattern routine rather than exceptional, which is how metadata resilience becomes institutional resilience over time.

There are real risks of inaction. Libraries that neglect metadata resilience face mounting user frustration from broken links, incomplete records, and inconsistent access. Discovery becomes fragmented, eroding trust in library systems and diminishing the library's visibility in the broader research ecosystem. Without reliable metadata, strategic decisions are based on flawed data, weakening the library's ability to demonstrate value and advocate for resources. In a time of tightening budgets and rising expectations, metadata resilience isn't just operational, it's essential to sustaining relevance, trust, and impact.

4.0 What to do now

Practical solutions for today's challenges

This section turns the case into practice at a program level. Operate one content pipeline, keep rights and versions visible where users decide, use assisted enrichment to remove noise at scale, and let evidence guide small, regular course corrections. The aim is to reduce friction now while setting up sustainable improvement over the year ahead.

Operate one pipeline for all content

Treat open and licensed resources as parts of the same flow from selection through discovery. Anchor activation in a vendor-neutral knowledge base so holdings and links move as one into the central index and resolver. Libraries that already use the **WorldCat knowledge base** with **WorldCat Discovery** follow this pattern in daily work, which shortens the route to full text and avoids parallel processes for open content. Keep this consistent across touchpoints, for example reading lists and learning platforms, so students and researchers see the same routes wherever they start.

Make entitlements actionable for users

Hybrid and transformative models only help if people can see which route will work. Record the terms that differ at title level and let those terms inform resolution and display so the best lawful copy appears first. Where license data is maintained in **WorldShare License Manager** and connected to knowledge base holdings, link failures and permission questions fall because the context travels with the record. A brief note in the interface can set expectations for reuse without forcing users to interpret policy documents.

Improve precision with automated enrichment

Catalogs and indexes perform best when duplication is low and links are current. Assisted enrichment removes noise without removing editorial judgment. OCLC applies machine learning to deduplication and link reliability across the network, which steadies discovery as packages change. For collections where context is critical, **WorldCat Entities** and **OCLC Meridian** help describe works, people, and organizations as relationships rather than strings, improving precision and recommendations. Use local overrides sparingly and review them on a simple schedule so exceptions do not become technical debt.

Libraries implementing machine-assisted enrichment have reported significant reductions in duplicate records, leading to improved discovery accuracy and freeing up staff time for strategic priorities.

Let evidence shape what you change next

Reports are most useful when they reflect how people actually get to content. Combine COUNTER via SUSHI with holdings aware reporting in WorldShare Reports or Report Designer so dormant titles do not distort choices. Add **EZproxy Analytics** to understand where access fails and who is affected. Use **Choreo Insights** to check alignment with programs and peer comparators, not just cost per use. When the data points to friction at a specific step, adjust the workflow that creates it, then watch the next cycle to confirm the fix holds.

Design for the whole research and learning journey

Discovery is only one step in a longer journey. Make sure the same link logic appears in course systems, repository pages, and subject guides so users encounter consistent cues for version, access, and reuse. A small investment in plain language for OA indicators and rights notes removes repeated questions at the desk and helps users choose confidently.

Connect discovery to the full academic experience

Discovery should support the entire academic journey, not just the moment of access. When metadata, access cues, and rights signals are consistent across course platforms, repositories, and research tools, users encounter a coherent experience that builds trust and reduces friction. This alignment helps libraries move beyond content delivery to become active partners in teaching, learning, and research. Shared infrastructure and metadata standards supported by tools like **WorldCat Discovery** and **Collection Manager** make it possible to extend discovery logic across systems without duplication or confusion.

When discovery, licensing, and access operate as one system, libraries move from managing content to enabling outcomes.

Agree on ownership and cadence

Reliable access to digital content depends on coordinated action across teams. When responsibilities for activation, licensing, discovery, and link maintenance are clearly defined, libraries can respond to change with greater agility. Establishing a regular review cycle, such as a monthly thirty-minute session supported by concise updates, helps acquisitions, e-resources, and discovery staff stay aligned without adding complexity. Including accessibility checks in this routine ensures that improvements benefit all users. This kind of stewardship strengthens institutional resilience and supports continuous improvement.

Align teams around shared stewardship

Effective e-resource management depends on coordinated action across teams. When roles are clearly defined and teams review entitlements, usage, and accessibility together, decisions become faster, more accurate, and easier to sustain. A simple rhythm such as monthly check-ins supported by shared dashboards and reporting tools can keep licensing, discovery, and access aligned without adding complexity. This kind of alignment strengthens the library's ability to adapt, respond, and lead in a changing digital environment.

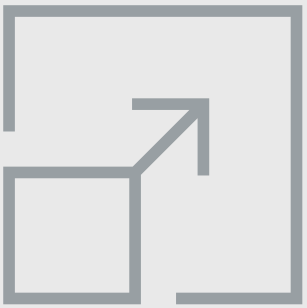
Align with consortium partners for maximum impact

Effective e-resource strategy increasingly depends on consortium coordination. Libraries participating in collaborative initiatives report stronger negotiating positions and shared infrastructure costs. When selecting platforms, prioritize solutions that support group agreements and shared analytics. **WorldShare Management Services** enables consortium members to maintain local customization while benefiting from collective metadata enrichment and usage benchmarking.

Minimize disruption during system transitions

Major system migrations are inevitable, but disruption isn't. Libraries successfully transitioning to cloud-based integrated platforms like WMS report three critical success factors: phased implementation schedules that align with academic calendars, dedicated migration support from vendor consultants with library practitioner backgrounds, and parallel systems operation during testing periods. Unlike complex systems that require specialized technical skills and extensive local infrastructure management, WMS simplifies the migration process by reducing the need for in-house technical expertise. The e-resource capabilities in the WMS platform are designed with streamlined workflows that are easy to configure and maintain, allowing library staff to focus on engaging with faculty and students rather than spending time on system maintenance. The cloud infrastructure handles the technical complexity, while award-winning implementation and customer support teams ensure libraries receive expert assistance every step of the way. This approach benefits institutions currently migrating to integrated library systems by providing migration toolkits that preserve local workflows while enabling new capabilities without requiring additional technical staffing.

5.0 What to do next



Extending the model for scalable impact

The practices outlined in this report establish a foundation for sustainable progress. As libraries reduce friction and unify workflows, the next phase focuses on extending that stability across systems, partnerships, and institutional priorities. This involves investing in approaches that scale effectively, support equity, and position libraries as strategic contributors to research, learning, and innovation. For instance, collaborative infrastructure investments such as shared knowledge bases and analytics platforms demonstrate ROI through reduced vendor duplication, faster onboarding, and improved access equity.

Advance metadata quality through collaboration

Discovery and access depend on metadata that is complete, current, and actionable. While title-level records have matured, article-level metadata—particularly for OA content—remains uneven. Libraries can accelerate progress by collaborating with publishers, aggregators, and platform providers to improve metadata granularity and transparency. Shared identifiers and consistent rights signals help ensure that users encounter trustworthy versions at the point of need. Infrastructure such as the **WorldCat knowledge base** and **WorldShare Collection Manager** supports this work by enabling metadata enrichment and distribution across systems.

Beyond technical accuracy, metadata must reflect the diversity of scholarly outputs and support inclusive discovery. Libraries can advocate for metadata practices that surface underrepresented voices, support multilingual access, and improve visibility of non-traditional formats. These efforts contribute to a more equitable and representative research ecosystem.

Integrate discovery across the academic lifecycle

Discovery is most effective when it supports the full journey of research and learning. Libraries can increase impact by embedding e-resource logic into course platforms, repositories, and research support tools. This includes consistent cues

for access, reuse, and versioning, along with plain-language indicators that reduce confusion. When discovery is integrated across academic workflows, libraries move beyond content delivery to become active partners in teaching, publishing, and knowledge creation.

To support this integration, libraries are aligning metadata and access logic across systems using shared infrastructure. Services like **WorldCat Discovery** and **License Manager** help maintain consistency across environments, while local customization ensures relevance to institutional priorities. This approach enables users to move confidently between systems, reducing friction and improving trust.

Coordinate stewardship to strengthen institutional agility

Strategic e-resource management benefits from clear roles and coordinated action. Libraries that align responsibilities for licensing, activation, metadata, and analytics are better equipped to respond to change and scale improvements. A regular review cycle, supported by concise updates and shared reporting, helps maintain alignment without adding complexity. Including accessibility and equity checks in this routine ensures that improvements benefit all users.

This kind of stewardship is supported by platforms that unify workflows and surface actionable insights. **WorldShare Reports** and **EZproxy Analytics** provide visibility into usage patterns, access barriers, and licensing effectiveness. When teams work from a shared evidence base, decisions become faster, more accurate, and easier to sustain.

Apply AI thoughtfully to support scale and precision

Artificial intelligence is helping libraries manage complexity, improve metadata, and personalize discovery. The next step is to apply AI in ways that sustain quality over time. This includes using machine learning to detect patterns, identify anomalies, and

guide enrichment, while maintaining human oversight. Responsible use of AI requires transparency, explainability, and alignment with professional values.

Libraries are beginning to use AI not only to automate tasks but to inform strategy. Tools like **Choreo Insights** support collection analysis and peer benchmarking, helping libraries align holdings with academic programs and research priorities. Smart fulfillment and other AI-enhanced services improve delivery and discovery without compromising editorial integrity. These capabilities allow libraries to scale services while preserving trust and professional judgment.

Build capacity for collaborative innovation

As libraries extend their impact, collaboration becomes essential. Working with consortia, publishers, and technology partners allows institutions to share infrastructure, influence standards, and co-develop solutions. This includes joint efforts to improve metadata pipelines, advocate for OA, and explore responsible AI applications.

Platforms like **WorldShare Management Services** provide a foundation for this collaboration by connecting libraries through shared workflows, data models, and service integrations. When libraries build on common infrastructure, they can innovate locally while contributing to global progress.

Extending impact means not only scaling technology, but also scaling trust, efficiency, and shared value across institutions.

Looking ahead

Libraries are shifting from reactive management to proactive strategy. Those that unify workflows, align metadata, and act on evidence are already seeing improvements in reliability, user satisfaction, and institutional alignment. The next phase is about extending those gains through collaboration, innovation, and shared infrastructure. By investing in scalable practices and responsible technologies, libraries can ensure that discovery and access remain resilient, equitable, and ready for what comes next.

6.0 What to do to scale

Lead the future of e-resource strategy

Libraries are redefining their role in the digital ecosystem. Rather than operating in isolation, they are building the infrastructure that underpins discovery, access, and data-informed decision-making across the academic landscape. This evolution reflects a broader shift in priorities, from managing content to enabling outcomes, from maintaining systems to shaping strategy. The transition from fragmented workflows to cohesive, scalable models is already in motion, driven by the need for agility, transparency, and impact. What comes next will be determined by those willing to lead with purpose, invest in shared infrastructure, and align technology with institutional goals.

This report has outlined a model for transformation. It has shown how libraries can reduce friction, align systems, and extend impact. It has demonstrated how metadata resilience becomes institutional resilience, and how analytics shift from reporting to strategic insight. It has made clear that discovery is not a standalone service; it is a connective layer across research, teaching, and learning.

The opportunity now is to lead. Libraries that unify metadata, licensing, access, and analytics are not just improving operations. They are influencing how knowledge is created, shared, and measured. They are shaping how institutions allocate resources, how users engage with content, and how equity is built into digital infrastructure.

This leadership requires more than vision. It requires investment in platforms that scale with complexity and adapt to change. It requires coordination across teams, systems, and priorities. It requires a commitment to collaboration, transparency, and continuous improvement.

WorldShare Management Services (WMS) provides a foundation for this leadership. It brings together the core functions of e-resource management (acquisitions, licensing, metadata, discovery, analytics, and access) into a single, integrated environment. Libraries using **WMS** are not just streamlining workflows. They are building the infrastructure that supports strategic alignment, operational agility, and user trust.

WMS enables libraries to manage open and licensed content as one system. It supports article-level metadata enrichment, persistent identifiers, and linked data relationships. It connects license terms to holdings and discovery logic, ensuring that users see the best available version with clear reuse signals. It integrates **COUNTER** and **SUSHI** usage data with authentication insights and peer benchmarking, allowing libraries to act on evidence, not assumptions.

This is not about technology for its own sake. It is about using infrastructure to deliver outcomes. Libraries that adopt **WMS** are reducing duplication, improving link reliability, and accelerating access. They are aligning collections with curriculum priorities and research goals. They are freeing up staff time to focus on strategic work, not manual maintenance.

The next phase of e-resource strategy is not incremental. It is transformative. Libraries must embed discovery into course platforms, repositories, and research support tools. They must advocate for inclusive metadata practices and equitable licensing models. They must collaborate with publishers, consortia, and technology partners to shape standards and improve interoperability. They must use AI to scale enrichment and personalization, while maintaining human oversight and professional judgment.

This is a call to action. The tools are ready. The infrastructure is in place. The evidence is compelling. What remains is the decision to lead.

The future of e-resource strategy will be shaped by those who connect systems to strategy, data to decisions, and discovery to outcomes.

Libraries must step forward not just to manage change, but to shape it. Not just to respond to complexity, but to simplify it. Not just to support access, but to define what access means in a digital-first, user-centered environment.

The future of e-resource management will be defined by those who connect systems to strategy, data to decisions, and discovery to outcomes. It will be led by libraries that invest in scalable platforms, align around shared evidence, and collaborate to build a more open, equitable, and resilient information ecosystem. It is those libraries that unify workflows and invest in shared platforms that are seeing tangible returns: reduced operational overhead, improved user satisfaction, and stronger alignment with institutional goals.

Take the next step: Assess your current state

The gap between where libraries are and where they need to be is measurable. The most effective way forward begins with understanding your current e-resource management maturity and identifying the highest-impact improvements for your institution.

OCLC offers comprehensive assessments that benchmark your workflows, metadata quality, and user experience against peer institutions. These consultations, led by library practitioners who understand your challenges firsthand, provide actionable roadmaps for improvement—whether you're evaluating platform migrations, optimizing consortium relationships, or building the business case for integrated solutions.

Want to understand your e-resource landscape more clearly?

Contact us at **oc.lc/e-resource-contact** to discuss how your institution's approach aligns with emerging best practices and how we can help you move forward with confidence.

Lead with evidence. Invest in collaboration. Make access work for everyone. Deliver outcomes that matter.

PM-PR-217915-WWAE-A4 2603