THE BRITISH LIBRARY’S CONTENT STRATEGY – MEETING THE KNOWLEDGE NEEDS OF THE NATION

Executive Summary 2

Summary of issues and process for consultation 5

1. Introducing the British Library’s content strategy 7
   1.1 The purpose of this review of the British Library’s content strategy 7
   1.2 How the review is being conducted 7

2. Understanding the context for the British Library’s content strategy 9
   2.1 The British Library’s history, audiences, services and stakeholders 9
   2.2 The British Library’s collection and collecting 10
   2.3 Trends in the creation and dissemination of information 13
   2.4 The changing needs of researchers 17

3. Setting the scene for the British Library content strategy 19
   3.1 The audiences for our content strategy 19
   3.2 From collection development to content provision 19
   3.3 Implications of a content strategy approach 20
   3.4 Managing the print-digital transition 22

4. The methodology for determining the British Library’s content strategy 23
   4.1 Identifying the drivers of our content strategy 23
   4.2 Using the drivers to determine our content priorities 25

5. Proposing our content strategy 26
   5.1 A high level picture of what will, and will not, change 26
   5.2 A content strategy for the arts & humanities 28
   5.3 A content strategy for the social sciences 30
   5.4 A content strategy for science, technology and medicine 31

6. Deepening engagement with our stakeholders 34
   6.1 Collaborating with other libraries and information providers 34
   6.2 Deepening the Library’s ongoing engagement with the research community 35
EXECUTIVE SUMMARY

The beginning of the twenty-first century is a unique point in the history of the whole information sector and of libraries in particular. Society is experiencing an unprecedented increase in the volume of information that is produced and consumed. At the same time, the internet has opened up entirely new ways of creating, disseminating and searching for information. Libraries, whose traditional model of collecting information and providing access to it has been unchallenged for centuries, now need to adapt to new paradigms. This challenge is made clear in the British Library’s recently published strategy, ‘Redefining the Library: The British Library’s strategy 2005-2008’.

As the national library of the UK the British Library plays a crucial two-fold role within the UK’s knowledge sector. First, through our status as a legal deposit library we are a trusted repository for all UK publications: we are thus a keeper of the UK’s cultural, scientific and intellectual memory. Second, we have a broad responsibility to serve the information needs of everyone in the UK who is doing research, for academic, commercial, public service or personal reasons. This requires us to provide access to materials from around the world as well as those from our UK legal deposit intake. However, the rate of growth in global publishing and the changes in research and communications brought about by new technologies mean that for materials that do not fall under legal deposit we must continually prioritise what we collect and increasingly seek to augment our own holdings by connecting with the content held by others. We must develop a ‘content strategy’, not simply a ‘collection development strategy’, if we are to remain one of the great research libraries in the twenty-first century.

The Library views this document as the first part of what will initially be a two-stage process. In this first stage we have articulated the overarching principles of our content strategy, and in addition have applied these in some detail to the areas of arts & humanities and social sciences. In a second, later, stage, we will consult on our science/technology/medicine (STM) strategy. This paper will look at our STM content strategy but also at service issues, including for example the future direction for our document supply service.

For the first time the Library has developed content strategies for broad disciplines (see Appendix 1) rather than our more traditional approach of geographic areas. In addition, we have articulated content strategies for special formats of material (see Appendix 2). We hope that these will form a starting point for a continuing dialogue with our users and stakeholders about how we can best meet their needs today and in the future.

To meet the needs of researchers and respond to the accelerating changes in scholarly publishing and communication, we are shifting incrementally towards collecting more of our purchased intake in digital form. This change applies particularly to science, technology and medicine (STM) journals at present, but we expect it will increasingly impact on other disciplines and formats too.

1 See www.bl.uk/about/strategy.html
Certain important aspects of our content strategy will not change, for example: we will continue to collect UK print legal deposit material and will collect digital legal deposit material as the 2003 Legal Deposit Libraries Act is translated into secondary legislation; we will continue to collect material from a wide range of disciplines, including material from around the globe as needed; we will continue to collect a wide range of formats and languages, depending on the information needs of researchers in different disciplines; we will continue to sustain our role as a centre of excellence for materials from and about the Middle East, South Asia, Eastern Europe, and North America; and we will continue to devote approximately 10 percent of our acquisitions fund to retrospective purchasing, especially of heritage materials.

However, other aspects of our content strategy require us to shift our focus and reprioritise:

- Our historic collecting has reflected, to a large degree, the course of British history and Britain’s role in the world. We propose to realign our resource allocation to ensure that we also reflect the reality of ‘Britishness’ today. This means taking account of today’s pattern of international research, and today’s economic and political environment. For instance, we need to give greater priority in our collecting to China, India, Anglophone Africa, and some South American countries. We also need to ensure that topics that are of particular importance to the UK are supported, for example, international security and environmental change.

- We will increase our focus on certain areas of the social sciences, including, for example, international law, politics, economics, and social policy.

- We will strengthen our focus on non-textual materials, for example:
  - We will define our approach to primary research data, including developing partnerships with key data repositories.
  - We will give greater attention to our visual and audio-visual collections as a whole and, in particular, deepen our holdings of historic and contemporary photography.

- We will increase our focus on electronic resources. One example of this is in the area of ‘grey literature’ (e.g. conference proceedings, reports) where we need to respond to the rapid shift of these materials from print-based publishing to online-only distribution.

- Within the area of manuscripts and archives, we will build on our strengths in traditional materials and in addition increase our focus on the challenging area of e-manuscripts, for example by collecting digital archives from key literary, political, and scientific figures.

- We will review our acquisition of overseas newspapers and ensure that our purchasing of them is fully aligned with areas in which we collect in particular depth, including the centres of excellence referred to above (Middle East, South Asia, Eastern Europe and North America).

To deliver our content strategy we need to build on our existing relationships and develop partnerships with other providers in the interests of meeting researchers’ information needs. This is not new to us, but the level of importance of partnership working is becoming ever greater. In addition, we need to strengthen the

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2 We will continue to seek to supplement this by fundraising from a variety of sources.
3 Defined here to include quantitative and qualitative data from experiments, simulations and surveys, as well as digitised full-text resources.
mechanisms through which we engage with researchers, thus ensuring that we are in touch with the changing needs of our user groups.

To implement the changes we have identified thus far within the context of a flat real-terms acquisition budget we need to continue to drive down costs associated with acquisition as much as possible. By doing this, through ongoing streamlining of our procurement and processing arrangements, as well as by reallocating funds across the breadth of our collecting, we are confident that we will free up sufficient resources to apply to the growth areas we have outlined.
SUMMARY OF ISSUES AND PROCESS FOR CONSULTATION

Issues on which we particularly seek views are distributed throughout this document. For convenience, they are also summarised below. You are invited to respond to some or all of them: please make clear in your response the number of the issue to which you are referring. We welcome comment from all interested parties, and will approach directly those organisations we know to have an interest in our plans. We will allow 12 weeks for the written consultation process, starting on 25 April 2006 and finishing on 21 July 2006. After the closing date we will undertake a thorough analysis of all the feedback. We will summarise the views expressed and make this summary available on www.bl.uk/contentstrategy by the end of 2006. We will then take your feedback into consideration as we develop a firm but dynamic content strategy during 2007.

The Library will be pleased to receive responses either by email or by post, but would prefer to receive an electronic document where possible. Please use the pro forma provided to identify yourself and, if appropriate, the organisation on whose behalf you are responding. Email responses should be sent to contentstrategy@bl.uk. Hard copy responses should be sent to: Content Strategy Team, Strategy & Planning, British Library, 96 Euston Road, London. NW1 2DB. As a public sector body, the British Library is subject to the Freedom of Information Act, 2000. Therefore, all information sent to the Library as a result of this consultation exercise may be subject to disclosure under the Act; we anticipate making all comments available in their entirety. If you have any questions during the consultation period, please contact the Content Strategy Team (tel: 020 7412 7110; email: contentstrategyquery@bl.uk).

This consultation document can be found on the British Library website at www.bl.uk/contentstrategy. For additional print copies of the document, or copies in large print, audio or Braille formats, please contact the Content Strategy Team using the details above.

Q1 Please comment on the Library’s approach to developing a ‘content strategy’ as defined in 3.2.1 - 3.2.2.

Q2 Please comment on any of the implications of the British Library shifting its focus to a content strategy, as described in 3.3.1 - 3.3.3.

Q3 Please comment on the British Library’s approach to managing the print-digital transition, as described in 3.4.1 – 3.4.3.

Q4 Do you agree with the Library’s assessment of the key drivers and practical considerations that should influence its content strategy (4.1.1 – 4.1.2)?

Q5 Please comment on the British Library’s overall proposal for what it should and should not change within its content strategy (5.1.1 – 5.1.2).

Q6 Within the context of finite Library resources, do you wish to make any suggestions about where the Library should decrease or increase its collecting? Please provide a rationale for any suggestions you wish to make.
Q7 Please comment on any of the draft format strategies in Appendix 2. (Please state clearly the name and number of the table you are referring to.)

Q8 Please comment on the British Library’s proposed high-level content strategy for the arts and humanities (5.2.1 – 5.2.5).

Q9 Please comment on any of the draft content strategies for arts and humanities disciplines in Appendix 1. (Please state clearly the name and number of the table you are referring to.)

Q10 Please comment on the British Library’s proposed high-level content strategy for the social sciences (5.3.1 – 5.3.5).

Q11 Please comment on any of the draft content strategies for social science disciplines in Appendix 1. (Please state clearly the name and number of the table you are referring to.)

Q12 Please comment on the Library’s preliminary thinking about its high-level content strategy for science, technology and medicine, as outlined in 5.4.5.

Q13 What factors do you believe the Library should consider as it continues to develop a partnership strategy that meets the needs of UK researchers (6.1.1 – 6.1.4)?

Q14 Please comment on the Library’s proposed approach for developing a deeper ongoing dialogue about its content strategy with researchers (6.2.1 – 6.2.3). Are there other mechanisms we should consider?
1. INTRODUCING THE BRITISH LIBRARY’S CONTENT STRATEGY

1.1 The purpose of this review of the British Library’s content strategy

1.1.1 The purpose of this paper is to outline a new draft ‘content strategy’ for the British Library. The term ‘content strategy’ means both what we should collect for our own holdings and what role we should play in providing access – for example through connecting to licensed or free material – to content held by others. Clearly, this strategy goes to the very heart of what we do, and it is thus vital that we hear the views of our users and other stakeholders on the direction we propose to take. We do not regard this as a ‘one-off’ consultation, but rather we hope that this document will catalyse a continuing dialogue on our content strategy. The issue of how we should best engage on this topic with our users is discussed in Section 6.2.

1.1.2 The fundamental driver for our decision to review the Library’s content strategy at this point is the enormously rapid pace of change in the publishing industry driven by the digital revolution. In the work leading up to the publication of ‘Redefining the Library: The British Library’s strategy 2005 – 2008’ we recognised that in such a quickly moving environment it would be timely to take stock and chart our future direction. In addition, recent internal developments such as the successful integration of 29 million catalogue records from 14 separate legacy systems into a single Integrated Catalogue put us in a position to consider our collection as a unified entity for the first time. It is these strategic drivers rather than a financial imperative that have led us to review our content strategy at this point.

1.2 How the review is being conducted

1.2.1 This paper has been developed by Library staff under the guidance of its statutory bodies – the British Library Board and the British Library Advisory Council. Recognising the breadth and complexity of questions involved, and the importance of these questions to our users and stakeholders, we have also supplemented our usual

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4 The changes in the information sector outlined in the Executive Summary have implications for every aspect of the Library’s strategy, including service strategy, people strategy, partnership strategy, digitisation strategy, and so on. This document does not address these issues in detail, but mentions them in passing where they have a direct bearing on content strategy issues. In describing our content strategy, the Library restates its commitment to enabling access to our collection and services by all our users, regardless of their circumstances. In particular, we especially recognise the needs of print-disabled users. The ways in which we do this form part of our overall access strategy, which is not explicitly covered in this document.

5 Over the period 2000-2005, the Library has sustained the real value of the acquisition budget. Although we envisage a tight outcome from the 2007 Comprehensive Spending Review, we will aim as far as possible to sustain the value of our acquisition budget going forward, where appropriate.

6 This body was established under the terms of the British Library Act to ‘advise the British Library Board on any aspect of the development of its services at home and its relations with libraries overseas’. Its membership provides experience and expertise from across the Library’s key audience groups. A list of members can be found on [http://www.bl.uk/about/governance/advisorycouncil.htm](http://www.bl.uk/about/governance/advisorycouncil.htm)
governance arrangements by convening a British Library Content Strategy Advisory Panel drawn from across the different research disciplines and from the UK and international library communities (see Appendix 3 for membership). This group has been extremely helpful in debating the issues and providing an additional external perspective on our proposals.

1.2.2 The Library would welcome comment on its proposals for the development of a content strategy. Our proposals will be of interest to the Library’s current users, potential future users, and stakeholder groups which represent them. We present questions distributed throughout this document on which we particularly seek views. These questions are summarised in the previous section which also gives details about how to respond and a contact point for any queries. We will make this consultation document widely accessible in print and electronic versions. We welcome comment from all interested parties, and will approach directly those organisations we know to have an interest in our plans. We will allow 12 weeks for the written consultation process, starting on 25th April 2006 and finishing on 21st July 2006. After the closing date we will undertake a thorough analysis of all the feedback. We will summarise the views expressed and make this summary available on www.bl.uk/contentstrategy by the end of 2006. We will then finalise our content strategy and communicate the changes we are making through www.bl.uk during 2007.
2. UNDERSTANDING THE CONTEXT FOR THE BRITISH LIBRARY’S CONTENT STRATEGY

2.1 The British Library’s history, audiences, services and stakeholders

2.1.1 The British Library was established by statute in 1972. Under the terms of the Act the Library was established as the national library of the UK, ‘consisting of a comprehensive collection of books, manuscripts, periodicals, films and other recorded material, whether printed or otherwise’. The British Library Board’s duty is to manage the Library as ‘the national centre for reference, study, bibliographical and other information services in relation both to scientific and technological matters and to the humanities’. The Board is specifically required to make the services of the British Library available in particular to ‘institutions of education and learning, other libraries and industry … and contribute to the efficient management of other libraries and information services’.

2.1.2 The British Library Act 1972 brought together a number of diverse bodies with national library functions. These bodies were: the library departments of the British Museum (including the National Reference Library for science and technology), the National Central Library, the National Lending Library for Science and Technology, the Office for Scientific and Technical Information, and the British National Bibliography Ltd. The India Office Library and Records and the National Sound Archive were subsequently added, in 1982 and 1983 respectively.

2.1.3 The British Library is funded from the vote of the Department for Culture, Media and Sport (DCMS) which groups us alongside museums and galleries, bringing a strong focus on cultural engagement and on supporting the creative and media industries. The British Library also supports the objectives of the Department for Education and Skills (DfES) and the Department for Trade and Industry (DTI). DfES looks to the British Library’s role in underpinning higher education and on the value we can add to other forms of lifelong learning. DTI focuses on our support for research and innovation, for example through our relationship with the Office of Science and Technology (OST) and the research councils. An area in which we are particularly relevant to DTI’s innovation agenda is in our support for small and medium enterprises (SMEs). Our relationship with the publishing industry is also of relevance to DTI.

2.1.4 The Library’s strategy focuses on meeting the needs of five key audiences, with researchers and business being our top priorities:

- Researchers – those doing research for academic, commercial, public service or personal reasons
- Business – all types of commercial ventures from individual entrepreneurs and SMEs (small and medium enterprises) to multi-national corporations
- Education – educators and learners ranging from school-children to life-long learners
- General public – all members of the public
- Library and information network – libraries and other information-focused organisations.
2.1.5 While our primary focus must be on the needs of the UK, as one of the world’s great research libraries we are also an essential resource to large numbers of overseas researchers, and we work closely with many partner institutions around the world. Our content strategy must therefore be seen in this international context.

2.1.6 We provide a wide range of services to our audiences. Through our two largest services we give access to our collection both onsite through the reading rooms and remotely through our document supply service. Other services include: reference services, the Business and Intellectual Property Centre, our publishing programme, public events and the creation of educational and lifelong learning resources for the web. We are currently developing new offerings centred on digital content, for example digital preservation and archiving services.

2.1.7 From this short description of the Library’s audiences and services it will be clear that we have a wide range of stakeholders and partners. These include the Government bodies mentioned above, our audiences, our suppliers (including all different types of publishers), other libraries and archives in the UK (including UK legal deposit libraries, university libraries, public libraries, Government libraries, special libraries, and archives) and overseas (especially national libraries, major international research libraries and archives).

2.2 The British Library’s collection and collecting

2.2.1 In common with all libraries, the British Library’s historic approach to its content strategy has been to focus on developing its own collection; that is, acquiring materials for its own holdings. We have one of the largest collections in the world, numbering approximately 150 million items. Our collection, developed over 250 years, represents every written language and covers every aspect of human thought. It spans the whole history of the printed book from incunabula to modern editions. The richness and variety of the items in the Library’s collection can be seen from the world’s earliest dated printed book, the Diamond Sutra (868AD), to the latest scientific and medical journals. Some idea of the scale on which we operate may be deduced from the following examples of statistics about our holdings:

- The equivalent of c.610 linear kms of collection items
- 13.3 million books
- 858,656 serial titles
- 55.8 million patent specifications
- 56,248 newspaper titles
- 314,063 manuscripts (single and volumes)
- 1.5 million sound discs and tapes
- 1.6 million music scores.

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7 Note that researchers in, or interested in, Scotland and Wales are also served by the National Library of Scotland (NLS) and National Library of Wales (NLW) respectively. These libraries are statutorily accountable to the devolved administrations, while the British Library retains its UK-wide role established by the British Library Act 1972. We work closely with the NLS and NLW to ensure appropriate congruence of collecting reflecting our respective missions.


2.2.2 The Library’s intake of collection materials comes through two main channels – legal deposit and purchase\textsuperscript{10}. We will briefly explain each of these channels in the following paragraphs, after which our main focus will be on purchased materials and materials we connect with, for example through linking.

2.2.3 Historically, the Library’s aim has been to build as comprehensively as possible the UK national published archive by acquiring one copy of every significant UK publication – typically, we receive over 95\% of UK published outputs\textsuperscript{11}. For a long time, this only involved printed material, the copy being acquired under the terms of legal deposit legislation which, in the case of the British Library and its antecedent institutions (the Royal Library and the British Museum Library) dates back to 1662. Non-print publications emerged during the twentieth century, initially recorded sound, then moving pictures, then microform, then handheld electronic materials, and finally online publications. As these non-print materials were not subject to legal deposit, the integrity of the national published archive in these formats depended upon a combination of Library purchasing and voluntary deposit. The Legal Deposit Libraries Act 2003 will extend the concept of legal deposit to the non-print world, through a series of subsequent Regulations. It also implicitly confirmed the continuation of voluntary deposit schemes for sound and film\textsuperscript{12}. It should be clear from this description that the Library acquires a substantial volume of material through the legal deposit channel alone, and that this can be expected to increase dramatically as electronic legal deposit becomes a reality. Our legal deposit intake spans all subjects and is an extraordinary research resource in its own right, even before it is supplemented by the materials we purchase. Between 2002-03 and 2004-05 our annual legal deposit intake included on average\textsuperscript{13}:

- 95,400 books
- 288,386 serial issues
- 2,112 maps and atlases
- 1,580 music scores
- 152,654 newspaper issues
- 327 play scripts

\textsuperscript{10} In addition to these, we acquire a comparatively very small volume of material through donations, exchanges, and loans. These channels (including any potential transfers from other libraries resulting from the proposed National Research Reserve) are not the focus of this paper.


\textsuperscript{12} Note that in the case of film, the receiving institution is the British Film Institute (BFI), not the British Library. However, the British Library does acquire significant amounts of multimedia material as well as holding extensive collections of resources about film. Archiving arrangements for film in the UK are somewhat fragmented and under-resourced. In the light of its remit under the 1972 Act, the British Library recognises that, working in partnership with the BFI and other providers and stakeholders, it has an important part to play in helping to ensure that a more viable framework for film archiving in the UK is established.

2.2.4 In addition to acquiring legal deposit material – which by definition is all types of material, not just scholarly items – the Library also purchases materials for the purpose of meeting the information needs of UK researchers. Traditionally, in addition to the stipulation that all purchased material should be at ‘research level’, the three main guiding principles we have used for selecting materials have been as follows:

- To illuminate as completely as possible the British historical experience in the world and the global spread of English language and literature, including reflection of Britain’s colonial and Commonwealth legacies
- To provide UK researchers with the most comprehensive reference collection of overseas materials possible (formerly, in the case of the British Museum Library, to be the best resource outside the country of origin)
- To support interlending and remote supply services for researchers unable to visit the reading rooms on the basis of both UK and overseas purchased material.

It is clear, therefore, that throughout its entire 250-year history, the British Library has always been a universal library, in the sense of collecting material on all the principal subjects, published in countries around the globe, and in all of the major languages. To that extent, we have been *encyclopaedic* in our collection coverage. However, contrary to popular misconception, we have never been able to collect *comprehensively* in the sense of absolute completeness. For purchased acquisitions, we were at one time able to offer the best collection outside the country of published origin, but in many cases this broke down during the course of the twentieth century. Since then, our purchasing has been increasingly selective as the volume of international publishing has steadily outstripped available acquisition funding.

2.2.5 In 2004/05 the Library spent c.£15.8 million on materials from around the world. The budget was used to acquire books, serials (print and electronic publications), heritage and retrospective materials, and current special materials. In 2004/05, expenditure on each of these categories was: c.£2.5m books; c.£10.1m serials (print and electronic publications); c.£2.6m heritage and retrospective materials and c.£0.6m current special materials. Note that approximately £2.8 million of the total budget was used to purchase duplicates of UK legal deposit materials for service reasons (i.e. providing document supply). In practical terms, the Library acquires these materials through a combination of subscriptions, standing orders, approval plans, selection by curatorial staff, and ordering on demand. Over the period 2000-2005, the Library has sustained the real value of its acquisition budget, notwithstanding relatively modest increases in its overall funding and continuing high levels of inflation for commercially published books and journals.

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14 Further detail of how these principles have been applied in different parts of the collection can be found at [http://www.bl.uk/collections/listings.html](http://www.bl.uk/collections/listings.html). We anticipate that these web pages will be modified in light of the current content strategy review, but they provide a helpful picture of the Library’s approach to date.

15 ‘Current special materials’ include newspapers, maps, music, patents and sound.

16 This figure includes capitalised carry-forward from 03/04. Note that the core funding that the Library spends on heritage material is used to help secure additional funding in the form of gifts and grants from corporations, grant making bodies, trusts and private individuals. During the period 02/03 – 04/05, the average gross cash received per year was £146k.

17 Of these routes, c.29 per cent (by value) of our acquisitions are selected as individual items, while the rest are through one of the other approaches (e.g. approval plans, standing orders).
2.2.6 It will be clear from the figures given that, while the Library’s budget for purchased acquisitions is substantial, and indeed is comparable with the best US research collections and significantly above the highest ranking UK universities, it allows us to purchase only a fraction of the world’s published output that is relevant to research. In addition, the rate of growth in global publishing (see Section 2.3) and the price increases in some publishing sectors far outstrip the rate at which we can realistically increase our acquisition budget; we are also vulnerable to changes in exchange rates. We must therefore prioritise what we purchase (as distinct from our UK legal deposit intake) and make judgements as to the relative importance of different types of content to the UK research base. This challenging but vital question of prioritisation lies at the very heart of our thinking about the Library’s content strategy.

2.3 Trends in the creation and dissemination of information

The Library commissioned Electronic Publishing Services Ltd (www.eps ltd.com) to produce a summary of relevant publishing trends. The resulting text follows in this section.

Global trends

Structural trends

Aggregating figures from international and national organisations indicates that world-wide book and serial publishing revenues exceed $110 billion.

‘Research-level’ publishing represents around 12% of that value, and appreciably less by volume, given the higher prices of academic publications. Scientific, technical and medical (STM) publishing is largest ($9.3 billion, of which serials represent 52% and books 15%). Social sciences (SS), and arts and humanities (A&H) are much smaller, perhaps $2.5 billion and $1.8 billion, respectively.

Multinationals dominate research-level publishing, but a long ‘tail’ of small players operates in niche subjects and national markets. Concentration is pronounced in STM, where over half of research-level revenues are for five publishers. SS and A&H are less affected by consolidation.

Growth is strongest in STM – 6.7% in 2005 – where advances need to be communicated rapidly. Statistics for other sub-sectors are unavailable, but publishers indicate that the need to communicate drives growth more strongly for serials than books, and that SS and A&H are growing less sharply. Since growth opportunities are limited in developed countries, publishers are expanding editorial activities in emerging economies.

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18 One example may be quoted, in what most would regard as an area of great collecting strength for the British Library. For North American, English-language publications, recent analysis has demonstrated that we purchase only around one third of the published universe of research-level books.
20 Ibid.
22 EPS Market Monitor, op. cit.
Electronic media
Globally, there are around 43,500\textsuperscript{23} journals, though prices are monitored routinely for 64,000\textsuperscript{24} titles, whilst impact factors are calculated for only 9,500\textsuperscript{25}. Of titles published in the two major publishing countries, USA and UK, the proportion available electronically is 59\%\textsuperscript{26}. For STM, this figure is over 70\%, whilst for SS it is 64\%, and for A&H 36\%.

For years, journal titles have proliferated as disciplines sub-divided. Electronic media have facilitated that process such that a single-article issue is possible. However, access to most journals is aided by a small number of platforms and digital object identifier (DOI) registries.

In the absence of statistics for electronic books, anecdotal evidence suggests that availability from publishers has not reached the same proportion as for journals, nor has usage taken off. Print appears still to be favoured for longer scholarly works.

In the networked environment, scholars also need to use new informal channels, such as ‘blogs’ (online diaries, sometimes delivered to interested parties) and ‘wikis’ (online efforts to create and refine content collaboratively).

Open access and digital repositories
Payment of publication costs by authors, institutions or funding bodies so that users may access articles without charge, is now an accepted alternative publishing model. The Directory of Open Access Journals lists over 2,000 titles\textsuperscript{27}. Some advocates see OA, in conjunction with digital repositories, as an opportunity for academic self-publishing to displace commercial publishers. Several publishers now offer an ‘author-pays’ model\textsuperscript{28}. Others maintain traditional subscription-based models, but permit OA after a time embargo.

Digital repositories providing storage for and access to scholarly communications cater for institutions’ own academics or for subject areas. The Registry of Open Access Repositories (ROAR)\textsuperscript{29} lists 638 repositories in over 40 countries.

\textsuperscript{23} Data extracted by the Library and Information Statistics Unit (LISU), Loughborough University, from Ulrich’s periodicals directory \url{www.ulrichsweb.com/ulrichsweb/}
\textsuperscript{24} Swets Information Services \url{www.swets.co.jp/SPI2006english.pdf}
\textsuperscript{25} Total number recorded in the Thomson Scientific (ISI) citation indexes is 9,469, viz:
ISI Science citation index expanded (6,474 titles):
\url{www.thomsonscientific.com/cgi-bin/jmlst/jlresults.cgi?PC=D}
ISI Social sciences citation index expanded (1,847 titles):
\url{www.thomsonscientific.com/cgi-bin/jmlst/jlresults.cgi?PC=J}
ISI Arts & humanities citation index expanded (1,148 titles):
\url{www.thomsonscientific.com/cgi-bin/jmlst/jlresults.cgi?PC=H}
\textsuperscript{26} These percentages are calculated on data extracted by LISU from Ulrich’s (see note 23).
\textsuperscript{27} \url{www.doaj.org}
\textsuperscript{28} Including, notably, Blackwell Online Open, OUP Oxford Open, and Springer Open Chooice.
\textsuperscript{29} \url{http://archives.eprints.org}; see also: van Westrienen, G and Lynch, C ‘Academic institutional repositories: deployment status in 13 nations as of mid-2005’, in \textit{D-Lib magazine}, Vol. 11, No. 9, September 2005: \url{www.dlib.org/dlib/september05/westrienen/09westrienen.html}
Author apathy, hitherto problematical, will be overcome by regulation by institutions and funding bodies, which are conscious of the value of intellectual assets they support. In the UK, the Research Councils intend to oblige authors to embrace OA and deposit work, even though obligatory deposit may inhibit formal publication. Similarly, legislation is under consideration in the USA. Success will also depend upon advanced cross-institutional search tools, such as those being developed under the Open Archive Initiative and in the commercial sector.

Regional variation

To speak of global publishing trends is valid, especially when considering STM or the impact of electronic media. Yet, speed of change and weight of factors vary geographically. Indigenous publishing in emerging countries tends to be relatively small, and focused upon pre-university education. This will change over a 10-year span. The accompanying table shows current output indicators for selected countries.

Emerging economies

China is the world’s seventh largest national economy, albeit 118th in terms of GDP per capita. With real growth expected to run at an average rate of more than 7% p.a. over the next 10 years, resources devoted to research and the wider dissemination of results are certain to increase.

India, despite ranking 155th globally in terms of GDP per capita, is already strong in computing. Publishing output statistics are not routinely collected, but estimates for books are half the output of the USA or UK. With real GDP growth projected at over 5% p.a. for the next 10 years, improved economic performance is bound to flow into higher education and university research.

Brazil’s modest output is orientated towards pre-university needs. With predicted average annual growth of over 3.5% p.a. for the next 10 years, the focus will change, but not in the immediate future.

Russia has a well-developed educational infrastructure, but research-level publishing remains relatively low. Future directions are less clear than for some other countries. However, economies such as Poland are likely to increase output.

30 Research Councils UK (RCUK): www.rcuk.ac.uk/access/statement.pdf
32 For example the University of Michigan OAIster project: http://oaister.umd.umich.edu/o/oaister
33 For example, Reed Elsevier’s Scirus initiative: www.scirus.com/srsapp/aboutus
36 Ibid.
37 Global Insight Inc (formerly DRI•WEFA): www.globalinsight.com
38 Ibid.
Language
Approaching 70% of journals are published in English/American\(^{39}\), the figure surpassing 80% for STM. This domination of research-level publishing output is likely to continue at least in the short term and possibly thereafter. The need for a lingua franca for research communications and acceptance of English for this purpose in many non-English-speaking countries, as well as adoption of English-based technical vocabulary will be powerful influences. A key unknown is the attitude of China in relation to research communications.

<table>
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<tr>
<th></th>
<th>Latest figures</th>
<th>Total output (Titles)</th>
<th>CAGR(^{40}) over last 3 years</th>
<th>Research level output (maximum figure)*</th>
<th>% of Total output *</th>
<th>Latest figures</th>
<th>Total output (Titles)</th>
<th>Net CAGR over last 3 years</th>
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<td></td>
<td></td>
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* Maximum figure, derived from analysis of titles by subject, but inevitably including university texts and some general titles

\(^{39}\) Percentage calculated on data extracted by LISU from Ulrich’s (see note 23).

\(^{40}\) Compound Annual Growth Rate
2.4 The changing needs of researchers

2.4.1 The growth and pervasiveness of the internet and an increasing use of online electronic sources are transforming research and dissemination practices. A ‘Google generation’ of researchers – including a growing number of independent ‘knowledge workers’ as well as academics, business, and public sector researchers – has an expectation of easily searchable, freely available information. Changing access models and the digital delivery of content have led to fundamental changes in research methods, practices and tools and in particular the dissemination of results. The constantly growing array of electronic resources from full-text databases to journals with integrated linking is resulting in enhanced expectations on the part of users, specifically that all material required should be easily available digitally. There is a greater desire by researchers to have tools and information sources embedded in their desktop/research environment and a move away from walk-in use of libraries for some types of research. The accessibility of the internet is leading users to expect instantaneous access to the information that they require, when and where they want it. Users are more and more requiring a demand-based approach to information and research tools in a 24/7 culture.

2.4.2 Researchers require a diverse range of material: traditional text-based information is only one element in this range. New modes of analysis and presentation of research findings which have not traditionally been part of scholarly publishing and therefore not part of library collections need to be addressed. The importance of primary research datasets is increasing across all disciplines, especially in the social sciences and sciences, but also in the arts and humanities. There is a need to connect multiple formats of material together, to address the integration of text and non-text material in a researcher’s work flow, and to aid researchers in their activities.

2.4.3 The technological developments that have enabled the changes in research dissemination described above have led to greater ease of, and opportunities for, collaboration between researchers in both a national and global environment. In the scientific disciplines big-science and e-science have provided the infrastructure for large-scale collaborations. Large-scale shared datasets and databases enable researchers to have access to important resources that would not be possible for one group of researchers alone. This allows them to work on different aspects or pieces of large problems, and enables them to contribute to and benefit from the work of other researchers and to share results. In the social sciences and humanities, the research book has in some cases been supplanted by a journal article linked to a dataset; and e-science approaches are beginning to be developed in these fields too. Such collaboration has led to a greater visibility of research results and in some cases is increasing the ease and opportunity for interdisciplinary research.

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2.4.4 The British Library needs to follow and take account of all these developments. They are taking place more quickly in science/technology/medicine (STM) than in other disciplines, but will ultimately impact on all research. We must, however, also recognise the continuing high demand for physical books and journals in the reading rooms. In some areas, such as the history of the book, the physical properties may well be the subject of study themselves. A content strategy must therefore address the future needs of researchers across the full range of scholarly resources – pre-prints, post-prints, journal articles, conference proceedings, books, datasets, technical reports, official publications, legal sources, maps, music scores, newspapers, blogs, manuscripts, and the non-textual (sound, photographs, prints, drawings, paintings, film).
3. SETTING THE SCENE FOR THE BRITISH LIBRARY CONTENT STRATEGY

In this section of the paper we begin to outline the key proposals we are putting forward for discussion. We focus primarily on the part of our content strategy over which we have the greatest discretion, namely the materials we purchase or connect with, as distinct from our legal deposit intake. We begin by considering the question of whose needs we should focus our content strategy upon. We then move on to consider the implications of having a ‘content strategy’ as opposed to a ‘collection development strategy’, and outline our approach to the print-digital transition.

3.1 The audiences for our content strategy

3.1.1 Of its five key audiences (see Section 2.1.4), the British Library has traditionally focused its selection of materials for purchase on the needs of researchers and business. This has included people doing research within higher education, the public sector and business, as well as those individuals who are not affiliated to any organisation. This focus has by no means precluded the use of the collection by our other audiences – education, the general public, and so on – but has simply meant that we have not, for example, purchased multiple copies of undergraduate textbooks, popular fiction, or other similar materials acquired by organisations such as university or public libraries to meet the needs of their particular user groups.

3.1.2 In this paper, the Library wishes to reiterate that we will continue to focus our content strategy on the needs of researchers, including those in academia, the public sector, R&D-intensive industries, and creative and media industries. In doing so, we will continue to maximise the benefits that our other audiences derive from the collection, for example through providing reading room access, document supply, our website, exhibitions, workshops for schools, and public events.

3.2 From collection development to content provision

3.2.1 Like all libraries throughout the ages, the traditional focus for the British Library has been on ‘collection development’ in the sense of building the Library’s own holdings. However, three key factors are putting pressure on this traditional model. The first of these is the massive growth in available material which makes it less and less likely that any organisation, even one as large as the British Library, could ever collect comprehensively. The second factor is the shift from print-based to electronic publishing with all of the changes in business models and researcher behaviour that this is bringing about. The third, related, factor is the risk of loss to the research community of valuable content as a result of the transience of some forms of web-based publishing. In this increasingly electronic world, the need for the British Library to connect to content held by others is growing in importance: we can no longer rely on our own holdings alone to meet the needs of our users. We therefore propose to focus on a content strategy rather than just on the traditional aspect of collection development (see Figure 1 for a simplified conceptual picture of the difference between a ‘collection development strategy’ and a ‘content strategy’ for the British Library).
3.2.2 Many of the scenarios available for ‘connecting’ to external resources are already part of the Library’s work. For instance, we license access to content held by commercial organisations, such as publishers, and provide lists of useful links on our website. Increasingly we will connect to freely available material such as that held within subject-based or institutional repositories, and ultimately we will develop more sophisticated linkages between our own materials and resources that are held by other organisations. One particularly important strand of this work will be to continue our efforts to ensure that researchers can navigate easily between materials held by the Library – for example journals, conference proceedings, and so on – and the primary datasets that are largely held by other organisations.

Q1 Please comment on the Library’s approach to developing a ‘content strategy’ as defined in 3.2.1 - 3.2.2.

3.3 Implications of a content strategy approach

3.3.1 There are some important implications which flow from this approach to a content strategy. Clearly, there are many potential benefits to researchers, who will gain access to a wider range of materials and be able to search through different types of information in a more integrated way. In addition, however, a content strategy focus requires that the Library and other information providers work together in a wide range of different types of partnerships, and this presents both opportunities and challenges. Of course, the British Library already has a number of partnerships ranging from formal agreements to informal professional exchanges. Going forward, we expect a stronger and more proactive partnership strategy – both nationally and internationally – to form an increasingly critical part of our approach as we seek innovative ways of meeting the needs of our audiences.
3.3.2 One of the most important implications of moving to a content strategy focus is the issue of the extent to which the Library has control over its information assets. When making selection decisions we necessarily have to think about the whole lifecycle of the material. There are more risks associated with providing long-term access to materials not held by the Library (e.g. licensed materials not held by us) than with providing access to materials drawn from the Library’s own holdings. Linking inevitably involves some loss of absolute control over content provision – a difficult issue for national libraries which have historically aspired to keep forever everything they have acquired – but for the reasons we have outlined is nevertheless a vital component of any realistic way forward. Recognising that we cannot guarantee perpetual access and preservation in all cases, therefore, we will provide access to digital content according to the various service models required to meet researchers’ needs and will make our best efforts to sustain this. Of course, we would look for a partner’s commitment to being a trusted repository focused on long-term access provision as a key part of any arrangement we would enter into. We do not, however, underestimate the challenges this presents to other organisations: partnership is not a quick or easy solution.

3.3.3 Another implication of focusing on a content strategy rather than just on the British Library’s collection concerns the quality of information we connect to. Even in the traditional collection model, libraries cannot guarantee beyond a certain point the quality or authenticity of the materials they hold. While the British Library’s expert members of staff make every effort to ensure that the Library purchases materials that are of an appropriate level and quality for research, they cannot scrutinise every item, nor would it be appropriate for them to do so. Rather, they use judgement and experience to determine the right types of materials to acquire without conducting an in-depth analysis of every item. In the linked, digital world we describe above, it would be even less feasible to scrutinise all the information – especially web resources – to which the British Library might connect42. Therefore, the question we must consider is how we can ensure that we connect to research-relevant materials from websites, subject and institutional repositories, datasets, and other new resources. There is no easy answer to this question; however, the two key approaches we will pursue are first investing in developing our own staff expertise to deepen our knowledge of the different fields of research, and second, collaborating with other individual researchers and organisations to draw on their experience and understanding of their particular fields of expertise (see Section 6.2 concerning the ongoing engagement of the British Library with the research community). In the end it is better to collect or connect based on the reasonable application of expertise than not to collect or connect unless research relevance can be absolutely guaranteed.

Q2 Please comment on any of the implications of the British Library shifting its focus to a content strategy, as described in 3.3.1 - 3.3.3.

42 Note that today our website www.bl.uk already contains over 11,000 links with other sites.
3.4 Managing the print-digital transition

3.4.1 One final area to consider in this section also relates to the Library’s response to the shift we have described from print-based publishing to electronic publishing. In this instance, however, we are largely concerned with what we collect for our own holdings rather than what we connect to. The specific question is the rate at which we should shift from collecting print materials to collecting digital materials where we have a choice of both formats (bearing in mind that we are referring here to materials we purchase, not to materials we receive through legal deposit). Several factors must be taken into consideration, including: the ease with which a researcher can search for, access and read an item; the cost to the Library of acquiring, storing, and providing access to an item; and the challenges involved in preserving an item for the long term. The question is most relevant at this stage to journals, although it may become more important for other formats in the future.

3.4.2 We have decided to change our collecting policy in two cases where we are currently collecting print only or both print and electronic formats in parallel, namely:

- duplicates of UK legal deposit journals purchased for service reasons, where we will purchase in future (wherever possible) only the digital copy while continuing to receive a printed copy under legal deposit
- purchased overseas journals, where we will proceed cautiously to acquiring the digital format where available, in the knowledge that other organisations around the world also hold copies of these journals43.

3.4.3 This change in policy builds on the approach we are already taking for European and US patents. For these materials we can now only acquire the electronic version in the knowledge that the US Patent and Trademark Office and European Patent Office have each made a commitment to sustaining permanent access. In pursuing this approach we are mindful of the technical risk we are taking when our own digital object management system is not yet fully operational and we will be relying on existing systems and back ups for stewardship of unique digital items within the collection44. However, this shift offers all the benefits of ease of accessibility for the researcher that the digital version brings in cases where the Library has hitherto purchased only the print copy. It also offers the Library benefits in the form of potential savings on the purchase price, small savings in collection handling at ingest and savings on print storage and print preservation.

Q3 Please comment on the British Library’s approach to managing the print-digital transition, as described in 3.4.1 – 3.4.3.

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43 Note that wherever possible we negotiate rights for local hosting within the Library and the provision of permanent access.
44 The British Library, in collaboration with other major libraries and technology companies, is working to solve the substantial technical challenges inherent in the need to preserve digital material for long-term use. We are making good progress in the development of a Digital Object Management system that will guarantee the perpetual preservation of digital materials. Until this ground-breaking system is fully operational we continue to ensure that we store our digital collection appropriately within our conventional IT infrastructure that meets normal industry standards for robustness and resilience.
4. THE METHODOLOGY FOR DETERMINING THE BRITISH LIBRARY’S CONTENT STRATEGY

In Section 3 we set out our thinking about a shift from focusing largely on building the British Library’s own collection to deeper consideration of what content we should connect to that we do not hold ourselves. We described some of the implications of such a shift, and also articulated how our collecting approach is responding to the print-digital transition. However, we also emphasised that this does not imply any decrease in the importance of building the British Library’s own holdings. It remains vital that the British Library, as the national library of the UK, should continue to build a coherent collection to meet the needs of UK research. Given the changes in the global publishing economy recorded in Section 2.3, and – in particular – the exponential growth in volume and the greater diversity and complexity of publishing formats, business models and dissemination mechanisms, it will be increasingly important for the British Library to demonstrate focus, clarity and transparency in its content strategy. Against a background of acquisition funding which, at best, will be level in real terms, selectivity in collecting is inevitable. But this must not be random; a coherent content strategy is vital. In Sections 4 and 5, therefore, we address primarily the multi-faceted and complex question of what from the world’s vast and growing published output the Library should purchase for its holdings: what should be our priorities, and what conversely should we not focus on. We also give some views on what content we should connect to for particular areas of research.

4.1 Identifying the drivers of our content strategy

4.1.1 Within the context of finite resources, we recognise the need to develop clarity over the factors that should determine what we collect and connect to. For this purpose we defined five key drivers. These are shown in no particular order as their relative importance varies across different research disciplines and we have not tried at this stage to apply any form of weighting. The Library must always strive to consider the immediate needs of UK researchers but we must also ensure we take a long-term view, anticipating as far as possible the content needs of future generations. In line with this, it will be noted that the five drivers below reflect a combination of shorter and longer-term factors.

Key drivers

- **Global trends** – Does this material relate to high-priority global themes (countries/regions or multinational issues) from a UK perspective? To assess this we made reference to documents such as the Foreign and Commonwealth Office’s strategy ‘UK international priorities’, December 2003, which affords high priority to security, ideology and religion, and environmental change, among other things.

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45 Note that given the special circumstances that often impact on the purchase of unique materials such as manuscripts, our discussion excludes these and focuses on published materials.
- **Relevance to UK** – Does this material develop the intellectual memory for the UK? Material falling into this category could be: by British authors based or published overseas; preponderantly about multicultural UK; related to the UK’s historical experience overseas; or such that it reflects the worldwide importance of English language and literature.

- **Current UK research priorities** – Is this area of research given priority in the UK as identified by public and private sector funding sources? Our analysis here focused on referring to the UK Research Councils’ strategies and breakdowns of expenditure, while recognising that these necessarily change over time. We also took into consideration other key documents such as HEFCE’s 2005 paper ‘Strategically important and vulnerable subjects’ and data such as the numbers of researchers in different fields.

- **Historic strengths** – Does this material enable the Library to strengthen the coherence of its content provision by building on existing strengths and expertise?

- **Demand** – How high is current demand for this material? What do we expect the future trends in demand to be? While we do not have as detailed information on usage of our collection as we might like, we looked at the results of recent usage surveys within the Library and identified a range of subjects covered. For example, among the social sciences collection, sociology and political science were among the most heavily-used categories.

4.1.2 In addition to these key drivers it is important that we check our strategy for practicality. To help us do this we identified three practical considerations:

**Practical considerations**

- **Provision elsewhere**\(^{46}\) – Are other organisations in the UK or internationally likely to purchase this material?

- **Access barriers** – How difficult is it for different groups of UK researchers to access this material in the UK or elsewhere (e.g. are there membership/charging/political restrictions to material)?

- **Life-cycle collection management** – Do we have or could we develop the capabilities to undertake all life-cycle collection management tasks (e.g. cataloguing, storage, preservation)?

| Q4 | Do you agree with the Library’s assessment of the key drivers and practical considerations that should influence its content strategy (4.1.1 – 4.1.2)? |

\(^{46}\) Provision elsewhere was seen as a practical consideration rather than a key driver to ensure that the British Library continues to sustain a coherent content strategy which is not dominated by ‘gap-filling’. We believe that through developing a clear strategy in this way it becomes more likely that dialogue about partnership opportunities can be progressed effectively.
4.2 Using the drivers to determine our content priorities

4.2.1 Using the drivers and practical considerations, we are addressing the question of what we should collect in two broad steps. The first step focuses on the arts, humanities, and social sciences. Here, we have used the UK Research Assessment Exercise 2008 panel structure as a practical expedient to provide a breakdown of research areas\(^{47}\) (see www.rae.ac.uk). We have proposed our draft content approach for consultation for each of the 38 research areas in light of the factors outlined in the previous section. In addition, we have identified the overarching priorities and trends in Section 5 below. The second step will require a similar focus on the area of science, technology and medicine. While we have carried out a substantial amount of work on this area, ongoing discussions about adapting to changing user needs and developing sustainable business models mean that the details of our content strategy in this area have yet to be fully worked through. Science, technology and medicine strategy is therefore covered only at a high level in this paper, and will form the basis of a later discussion document.

\(^{47}\) While no framework of this sort can be perfect, this structure has the important benefit of being familiar to our largest research community.
5. PROPOSING OUR CONTENT STRATEGY

5.1 A high level picture of what will, and will not, change

5.1.1 As explained in Section 4, it is not realistic to expect the British Library to be truly comprehensive in its content strategy. We will need to prioritise what we collect, and what information we give access to, and this requires us to keep under constant review whether we are achieving the optimum content balance in relation to the needs of the present research community (and in anticipation of the needs of future researchers), not least in balancing continuity with past collecting and the changing nature of research and publishing. We have discussed these and other key drivers in Section 4.1. But it is worth emphasising here that certain important and defining attributes of the British Library’s collecting and content strategy will not change:

- We will not change to focus solely on the collection of our own nation’s published heritage, unquestionably important though that will be for us. Rather, we will continue to collect material published in countries around the globe.
- We will continue to maintain at least a minimum breadth of coverage across all the disciplines. However, our collection has greater depth in some disciplines than others and we expect this to continue to be the case.
- The collection will continue to be format-blind in that we will acquire publications in all formats where they meet the content quality criteria for acquisition\(^{48}\). We will therefore continue to collect or connect to a wide range of formats, our proposed policies for many of which are included in Appendix 2.
- Following current British Library practice, our collecting will continue to encompass, as appropriate, publications in foreign languages, although in some subjects, not least science, technology and medicine, English-language material will continue to be given priority in cases where the relevant information is available in both languages. Where the information is only available in a foreign language, it will continue to be collected, or otherwise made accessible, where it meets our content criteria.
- We will continue to devote approximately 10 per cent of our Government-derived acquisitions funding to retrospective purchasing\(^{49}\), especially of heritage materials\(^{50}\), notably archives and manuscripts and books printed before 1900. This aspect of our collecting relates primarily to the UK; material not directly of UK relevance will continue to be acquired by exception only, for example where it fills a significant gap in an important aspect of our collection (an example of this is the recent acquisition of the last surviving Sforza leaf which has now been reunited with the Library’s illuminated fifteenth-century Sforza Book of Hours).

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\(^{48}\) We will, however, inevitably also need to be conscious of the practicability and cost of preserving those formats for future generations (we refer to this as the collection life-cycle).

\(^{49}\) Our public funding will here be augmented by grant applications to external foundations and charities, and by our own trust funds. In this regard, we would particularly acknowledge the vital contribution made by the Heritage Lottery Fund, the National Heritage Memorial Fund, the National Art Collections Fund, the Friends of the British Library, the American Trust for the British Library, the Friends of the National Libraries, the Pilgrim Trust, and other individual donors.

\(^{50}\) Note that the British Library’s ethical acquisitions policy states that we will acquire cultural property ethically and legally, and in conformity with the due diligence procedures laid down in ‘Combating illicit trade’ (London: DCMS, October 2005). This document is available on [www.culture.gov.uk](http://www.culture.gov.uk).
5.1.2 While these important attributes of our content strategy will not change, in other ways we will need to shift resources in response to the drivers outlined in Section 4.1. The detailed changes we propose are given in Sections 5.2-5.4, and in Appendices 1-2, but a few high-level observations are as follows:

- In discipline terms, maintaining the currency of our collection will naturally involve tracking, and reflecting in the content we acquire or give access to, the major trends in research and publication in the field. As new disciplinary or interdisciplinary topics emerge, our acquisitions will reflect them. Similarly, as interest in a topic declines and less is published that relates to it, we will acquire fewer items. In addition to this tracking approach, we will make some conscious shifts as described in Sections 5.2-5.4.

- From a geographic point of view, our historic collecting has reflected, to a large degree, the course of British history and Britain's role in the world, in terms of exploration, trade, migration (in both directions), cultural interactions and colonisation. The British Library is, in many respects, the published embodiment of the British Empire and Commonwealth, and we recognise the importance of continuing to reflect that to an appropriate extent. However, the pattern of international research and scholarship, and of economic growth and political power, has unquestionably changed since the Second World War, rapidly so during the past decade, and the British Library should also aim to track and mirror those changes in its content. This will require some conscious and incremental reallocation of British Library resource:
  
  - For example, our current collecting from China is at a relatively low level and will need to be increased if it is to do justice to the rapid growth in the research and politico-economic significance of China as manifested in a major explosion of scholarly publishing there, much of it in the English language. In a similar vein, we need to ensure that we collect sufficient material from India to reflect its position as a key growth economy.
  
  - We will increase our level of collecting from very selective to selective for key Latin American countries, whose relative importance in research and publishing is increasing.
  
  - At the other end of the spectrum, there may be a case for some modest downward adjustments in collecting from certain parts of Western Europe and the Commonwealth which are, relatively, no longer as strong in research and publishing as they once were (see Section 2.3).

- One of the most important shifts from the point of view of the format of materials is to ensure that we respond to new digital formats as they emerge. While our collecting of many of these will largely be shaped by UK legal deposit regulations relating to web archiving, we must also be vigilant for new formats of research-relevant non-UK digital materials such as online conferences. It is also very important that we respond appropriately to the growth in importance of primary research data across all disciplines.

5.1.3 To implement all of the changes we have identified thus far (i.e. all changes summarised in Section 5) within the context of a flat real-terms acquisition budget we need to continue to drive down costs associated with acquisition as much as possible. By doing this, through ongoing streamlining of our procurement and processing arrangements, as well as by reallocating funds across the breadth of our collecting, we are confident that we will free up sufficient resources to apply to the growth areas we have outlined.
5.2 A content strategy for the arts & humanities

5.2.1 As highlighted in our strategy\textsuperscript{51}, for the arts and humanities researcher, the British Library serves as an essential laboratory for their research and the generation of new knowledge, which itself will become part of the collection. Over 250 years of collecting have resulted in the accumulation of one of the greatest research collections in the arts and humanities, covering all periods of the written and recorded word, in most known languages and in a wide range of formats from ox-bones to e-prints, as well as significant collections of non-textual objects. Research-level materials provide essential secondary sources for the study of all arts and humanities disciplines. There are extensive primary source materials – the manuscripts of literary works, archives (including the India Office public records), works of art, newspapers, sound, and the national published archive itself, as well as surrogates of related archival and printed materials. Our curatorial staff adds value in helping the researcher to access and understand collection items.

5.2.2 It is essential that the British Library builds on these strengths but also responds to changes in research and emerging models of scholarly communication. We will work with the Arts and Humanities Research Council, with whom we have Academic Analogue Status from April 2006, the British Academy and other key national institutions and professional bodies to understand and provide for the changing needs of the arts and humanities researcher and the emergence of new and interdisciplinary subjects. We will work with the Research Information Network (RIN), the Consortium of Research Libraries in the British Isles (CURL), and through formal collaborative agreements with other partners to maximise the availability of research-level materials to the UK researcher. We will work with partners to digitise extensive collections of materials to enable the collections to be usable beyond the reading rooms and to support new ways of analysing materials e.g. newspapers, sound, manuscripts, Shakespeare’s quartos, and the Dunhuang collection.

5.2.3 Although the whole of the British Library’s collection provides potential objects of study for the arts and humanities researcher (e.g. scientific journals form important evidence for the history of science), the arts and humanities researcher particularly values its world-class arts and humanities collections. All cultures, languages and subjects

\textsuperscript{51} ‘Redefining the Library: The British Library’s strategy 2005-2008’
can be studied in both breadth and depth, but particular strengths are English language and literature (worldwide), British history and British involvement across the world over time, religions, music and the performing arts, the history of science (worldwide), European languages and literatures, certain language-based area studies, the histories of the book (worldwide), and the history of art. In addition, important formats include Western and Oriental manuscripts, maps, music, sound and philately. Relative weaknesses are in the collecting of datasets (a small but increasingly important source in this area), film and video, and gaps resulting from financial pressures in the 1980s and 1990s. A perceived future threat is in the area of English literary manuscripts, which are increasingly becoming international commercial objects and as such are acquired by the highest bidder (often abroad).

5.2.4 The British Library will continue collecting in the arts and humanities as a whole. In no particular order, our priorities will be:

- Making appropriate shifts in our collecting to reflect trends in research, key global issues, and demand. Examples of these shifts include giving greater priority in our collecting to area studies materials relating to China, India, Anglophone Africa, and some key South American countries.
- The filling of historic gaps and extension into new formats of the national published archive.
- British Library leadership for a national strategy for English literary manuscripts.
- The acquisition of in scope British (and related Commonwealth) historical archives of research potential.
- Working with the Arts and Humanities Data Service (AHDS) and the Economic and Social Data Service (ESDS) to secure long term researcher access to relevant datasets.
- Continuing to sustain three distinct propositions: histories of the book, popular culture, and some language-based area studies (e.g. Middle East, Eastern Europe and South Asia).
- We will review our acquisition of overseas newspapers and ensure that our purchasing of them is fully aligned with areas in which we collect in particular depth, including the centres of excellence referred to earlier (Middle East, South Asia, Eastern Europe and North America).
- We will give greater attention to our visual and audio-visual collections as a whole and, in particular, deepen our holdings of historic and contemporary photography.

5.2.5 Appendix 1 contains a draft proposal for the Library’s content strategy for each of the broad arts and humanities disciplines defined by the Research Assessment Exercise 2008 panel structure. These are not intended to be definitive, and indeed we recognise the increasing importance of interdisciplinarity in many areas of research. However, they are provided as an invitation to dialogue to organisations and researchers in each broad research area. In many cases this is the first time we have attempted to describe our content using a subject-oriented approach. We anticipate using input from this consultation exercise to refine and shape our subject content strategies in future work. We also expect to increase over time the extent to which we articulate our approach to connecting in the different areas as well as collecting. Readers should note that many of the format-specific content strategies in Appendix 2 will also be of interest to arts and humanities researchers, and we similarly invite comment on these proposals (see Question 7).
5.3 A content strategy for the social sciences

5.3.1 In support of the corporate strategy for social sciences\textsuperscript{52}, the Library’s content strategy will focus on ensuring the best provision of social science research information for future researchers. In terms of future collecting, the content strategy will reflect the priorities of the Economic and Social Research Council, the UK Government’s social policy agenda, global social and economic trends which impact on the UK, and methodological developments, such as the growth in the production of systematic reviews to support evidence-based policy.

5.3.2 With the London School of Economics (LSE) Library, the British Library provides one of the most comprehensive sources of information for the social sciences in the UK. The Library has particularly strong current and historic collections of UK and overseas English-language research-level books in the field; strengths in Slavonic and East European material; academic journals world-wide in all languages; UK and US research and practice reports (grey literature); official publications and inter-governmental organisation publications; and conference proceedings. The Library’s historic collection of West European language books is strong up to the 1980s. Historic collections of inter-governmental organisations’ and foreign national government publications are also strong, but current intake of national government material is on a reduced scale. The Library is acquiring a growing number of electronic journals in the social sciences as well as significant electronic resources such as abstracting and indexing services, full text online sources (e.g. of legal information), and UK websites as part of its web archiving programme. Only a small number of datasets is acquired.

5.3.3 The Library partners with the LSE Library in the area of foreign statistical publications in which LSE is strong and in foreign Parliamentary and executive agency publications where the British Library has strengths. In the case of the Institute for Advanced Legal Studies the focus of collaboration is on foreign legal gazettes where our content strategy activity has been on the rationalisation of holdings between the two institutions.

5.3.4 The Library has recently earmarked significant funding to strengthen its expertise in the social sciences. From a content strategy point of view we will consolidate our strengths around UK and English-language research-level books, academic journals worldwide, US and UK ‘grey literature’, official materials worldwide, and Slavonic and East European materials. We will extend our intake of electronic journals and associated resources including websites. We will continue to acquire a limited number of datasets but will focus on linking and resource discovery such as to the Economic and Social Data

\textsuperscript{52} ‘Redefining the Library: The British Library’s strategy 2005-2008’
Service and the Arts and Humanities Data Service. More broadly, we will work with the Economic and Social Research Council (ESRC), the British Academy and other key national institutions and professional bodies to understand and provide for the changing needs of the social science researcher and the emergence of new and interdisciplinary subjects. The Library has recently contributed to the ESRC’s review of the social science information environment: in this review the Library has been identified as one of ESRC’s key partners and there is a clear intention on the part of both organisations to strengthen the existing relationship. Regarding other organisations, we will work with the Research Information Network (RIN), the Consortium of Research Libraries in the British Isles (CURL), and through formal collaborative agreements to maximise the availability of research-level materials to the UK researcher. In particular, the Library will continue to work closely with the LSE Library and, in the case of foreign legal materials, with other major research libraries such as the Institute of Advanced Legal Studies Library, the Bodleian Law Library and the Squire Library of the University of Cambridge.

5.3.5 Appendix 1 contains a draft proposal for the Library’s content strategy for each of the broad social science research areas defined by the Research Assessment Exercise 2008 panel structure. These are not intended to be definitive, and indeed we recognise the increasing importance of interdisciplinarity in many areas of research. However, they are provided as an invitation to dialogue to organisations and researchers in each broad research area. In some cases this is the first time we have attempted to describe our content using such a subject-oriented approach. We anticipate using input from this consultation exercise to refine and shape our subject content strategies in future work. We also expect to increase over time the extent to which we articulate our approach to connecting in the different areas as well as collecting. Readers should note that many of the format-specific content strategies in Appendix 2 will also be of interest to social science researchers, and we similarly invite comment on these proposals (see Question 7).

| Q10  | Please comment on the British Library’s proposed high-level content strategy for the social sciences (5.3.1 – 5.3.5). |
| Q11  | Please comment on any of the draft content strategies for social science disciplines in Appendix 1. (Please state clearly the name and number of the table you are referring to.) |

5.4 A content strategy for science, technology and medicine

5.4.1 As described in the Library’s corporate strategy53, our strategic proposition for science, technology and medicine (STM) highlights the importance of our role in the national e-infrastructure, our focus on developing partnerships to meet researchers’ needs, and our need to develop new tools and approaches to continue to add value in a volatile environment.

53 ‘Redefining the Library: The British Library’s strategy 2005-2008'
5.4.2 The British Library houses one of the strongest collections of scientific, technical and medical literature in the Western world. We provide access to a range of print and digital information resources unequalled by any other UK provider, including STM literature and a collection of patents from almost every issuing authority in the world. We hold a major collection of modern print and digital STM material and of early books, periodicals and other publications relevant to the study of STM from the late 15th century to the present day. The scope of the collection extends from the first printed British patent, to works by and about major scientists including material by Isaac Newton, Carl Linnaeus and Charles Darwin. Our current collection of modern scientific literature covers all subject areas and disciplines and is sourced from every significant international publisher. Strengths of this collection include:

- Extensive journal collections. Through legal deposit and purchase we collect extensively in English language, currently holding 100% of journals cited by the Institute for Scientific Information (ISI). We also collect selectively in foreign languages, focusing especially on Slavonic and Oriental languages. In addition to scholarly peer-reviewed titles we collect UK trade journals through legal deposit, and we selectively purchase other English language trade journals.
- A strong collection of English language research books. The profile of the collection reflects trends in publishing outputs with the majority of the material from Europe and North America. Foreign language material is acquired very selectively, by exception, for example in areas where there is no adequate English language coverage and it adds to the international scientific research record. Our book collecting is focused on newly published material.
- Extensive collections of so-called ‘grey literature’, including conference proceedings, reports, and theses.
- Extensive map collections and sound recordings (e.g. wildlife sounds), each of which supports particular areas of STM research.
- Subscriptions to a number of abstracting and indexing databases and full text electronic resources for reading room use (we aim to subscribe to the major A&I database in each STM discipline).
- An excellent collection of scientific manuscripts, with particular strengths in ancient and mediaeval natural philosophy, and 17th-19th century scientific papers.

5.4.3 While the Library has an extraordinary collection of many different formats of information, we have not traditionally collected primary research data to support STM research. Research data is held in a wide variety of different ways, ranging from large data warehouses within research institutes, to institutional repositories, to individual researchers’ personal archives. Other areas in which the Library is less strong include 20th-century science manuscripts (although there is now an active programme to address this issue), and industrial archives.

5.4.4 The Library’s content strategy must take account of a large number of changes in STM information as well as the shifting global profile of STM research that impacts upon publishing trends (for example, the increasing investment in STM research in China). The focus of STM research information has traditionally been the scholarly journal, and to a lesser extent the research book: this is reflected in the strength of our historical and current holdings. Now, however, seismic shifts caused by new technologies are changing the landscape of scholarly communication and publishing. Data are becoming increasingly important across all disciplines. There is an increasing need for integration of text-based information such as journal articles with the underlying data. Institutions and discipline-based communities are starting to create
open-access repositories. New journal business models – such as ‘author pays’ – are being developed within some subject fields. ‘Big deals’ between university libraries and large e-publishers give access to a wider range of journals, resulting in a decline in demand for the British Library’s document supply service.

5.4.5 The speed and magnitude of these changes within the STM information sector are such that the Library needs to address a very broad range of strategic issues, including what services we should offer and with whom we should partner, as well as what content we should collect and connect to. Discussions are currently ongoing, for example, about developing a sustainable model for our document supply service in light of declining demand. Clearly, service issues have an important interdependence with content strategy in this case, and the Library has earmarked significant funding to strengthen its STM expertise as it develops its STM strategy. As a result, a separate paper will be developed at a later date to consider our STM strategy in the round. In the meantime, many of the tables in Appendix 2 relating to content strategies for specific information formats will be of interest to the STM research community, and in addition the following high-level content-related priorities are proposed:

- We will continue to collect across all disciplines to provide a baseline collection of journals and research books. However, as we develop our STM strategy we will consider the need to reduce the extent to which we purchase some low-use titles in order to invest in developing new STM services and expertise.
- In light of declining demand, we will review the extent to which we purchase duplicates of some titles to service document supply requirements.
- We will increase the proportion of our intake that we take in electronic form, following the general trend from print to digital information.
- We will review our collecting profile across different areas of the world. Where necessary, we will make shifts in our resource allocation. For example, with the growth in importance of Chinese scientific research, we will need to consider whether to increase our Chinese collecting or linking over the coming years.
- We will develop a connecting strategy to respond to the increasing volume of data and other born digital objects: databases and datasets (e.g. Genbank); computer algorithms; e-prints, reports and conference proceedings housed in open access discipline based archives (e.g. ArXive, CogPrints) and institutional repositories (e.g. CERN document service, CCLRC ePublications archive); and so on. It is not feasible for the Library to ‘collect’ or ‘hold’ this content in the traditional understanding of a collection but we will move towards supporting access to the content (primary research data and secondary sources) through collaborations and links with the research communities and content producers.
- We will prioritise our connecting strategy initially around a limited number of key areas. Preliminary analysis aimed at identifying where the Library could develop distinctive, value-adding services suggests we should investigate the potential of developing offerings within three areas: biomedicine; energy and climate change; and material science and nanotechnology. A particular focus might be on facilitating knowledge transfer by helping STM-based SMEs to access the information they need.
- Further work is needed to validate this early work, and comments as part of this consultation process are very welcome.

Q12  Please comment on the Library’s preliminary thinking about its high-level content strategy for science, technology and medicine, as outlined in 5.4.5.

54 Note that the Library’s web archiving strategy is focused on UK material: the international model we are working to (through the IIPC) is that each country should take responsibility for archiving its own domain.
6. DEEPENING ENGAGEMENT WITH OUR STAKEHOLDERS

6.1 Collaborating with other libraries and information providers

6.1.1 The British Library has had a long tradition of working in partnership with other leading library and information providers, both in the UK and internationally (not least through our membership of European and global networks of sister national libraries). In terms of content strategy, in recognition of the fact that even an institution such as the British Library cannot be self-sufficient in its provision of content and services to researchers, we have been at the forefront of collaborative collection development and collection management work in the UK for much of the past decade. While we recognise the many challenges inherent in developing successful partnerships, we are committed to continuing to make progress in this area as we believe it to be of fundamental importance to the long-term health of UK research.

6.1.2 We have been instrumental in the establishment and sponsorship of the British Library/Higher Education Taskforce of 1999-2001, the Research Support Libraries Group of 2002-04 and the Research Information Network which was launched in 2005 and has its administrative headquarters at the British Library. We have developed increasingly close links with higher education research libraries in general and have been an active member since 2001 of the Consortium of Research Libraries in the British Isles (CURL), one of whose work-streams has been collaborative collection management, with significant progress already made in developing a coherent national map of collecting within Russian and East European Studies55. We are working with JISC to develop a UK e-content policy framework to enable public sector organisations to collaborate and co-ordinate their e-content activities, making best use of limited resources.

6.1.3 We have worked with individual libraries to set up collaborative acquisitions in areas where the UK has a rather fragmented provision; examples are our partnerships with the London School of Economics and the Institute of Advanced Legal Studies to build up an extensive national holding of overseas official publications, statistics and gazettes. We participate in some area-focused groups such as SCOLMA’s national programme for acquisitions from Africa, and the Japan Library Group. We work particularly closely with the five other legal deposit libraries of the UK, and, in reflection of the British Library’s statutorily-defined UK-wide role, not least with the National Library of Scotland and the National Library of Wales to ensure that there is appropriate congruence of collecting within the UK and the devolved administrations. We also work in partnership on an ongoing basis with our international counterparts, including the Library of Congress and the Bibliothèque nationale de France.

55 Learnings from this Collaboration For Research (CoFoR) project could inform future subject, language or area-based collection management work.
6.1.4 By articulating the British Library’s own content strategy for the foreseeable future, it is very much our hope that this document will facilitate exploration with other library and information providers within the UK of their own future collecting and how we can interact with and complement each other. We recognise that, given the scale of our investment in content acquisition, the British Library has a national leadership role in this area, and we are determined to exercise that role in a way which ensures that, through collaboration, the research information provision for the UK is the finest in the world. We readily accept that there will be some specialist institutions that are able to develop and sustain their collecting of published material in a particular field to a greater depth than would be possible for the British Library, and we acknowledge that, in the case of archives and manuscripts, there is a large number of essential players in the UK landscape. At the same time, given that we serve a wide spectrum of researchers, many from beyond the higher education community and many from abroad, we must maintain an overall coherence in our collecting; it is not appropriate for us simply to fill in the content gaps that others have left. We must also ensure that, where we develop partnerships with other providers over collecting, it does not become simply a question of sharing the responsibility for acquisition, but that adequate and guaranteed long-term arrangements for free physical access to all and preservation are put in place.

| Q13 | What factors do you believe the Library should consider as it continues to develop a partnership strategy that meets the needs of UK researchers (6.1.1 – 6.1.4)? |

6.2 Deepening the Library’s ongoing engagement with the research community

6.2.1 One of the key factors which has prompted us to consult on the British Library’s content strategy is the desire to move to a deeper level of engagement with the research community. In a rapidly changing information environment where we cannot achieve comprehensiveness of coverage there is an increasing need to validate our content strategy with researchers on a regular basis. Of course, we already have many close links, both with organisations such as research funders and learned societies, and with individual researchers. However, there is always more we can do, and we hope that through this consultation exercise we will take another step along the journey towards increased transparency and dialogue.

6.2.2 The breadth of our remit (as outlined in earlier sections of this paper) means that it is no simple task to find practicable ways to engage with the wide range of researchers who have a stake in the complex topic of our content strategy. Our governance structure (see Section 1.2.1) provides us with a formal structure for some input, guidance and debate. Building on this and using the input from this consultation we will develop new mechanisms. Examples of approaches we might explore include:

- Taking full advantage of our newly-acquired Academic Analogue status with the Arts and Humanities Research Council, as well as our relationships with the British Academy and learned societies, to engage with experts from across the range of arts and humanities disciplines on how to prioritise our collecting and connecting in this area.
■ Seeking to engage with social scientists by strengthening our links with the Economic and Social Research Council (building on the recommendations emerging from the ESRC’s review of the social science information environment) and with key social science learned societies. We are currently investing in building up the number of expert staff we have in the social sciences to enable us to strengthen our focus on this area.

■ Strengthening our expert staff capacity in science, technology and medicine and building on our existing relationships within the Office of Science and Technology and research councils so that we can use the responses to the next STM-focused phase of this consultation to consult more widely with STM researchers.

■ Taking the subject templates in Appendix 1 (and similar for STM) and the feedback we receive on them as a starting point, develop a rolling programme of reviewing our content strategy for particular research disciplines. This might take a traditional form such as gathering a panel of expert researchers and asking their view on our current purchasing and connecting approach for their area. Alternatively, we might try something more e-enabled, such as piloting an online discussion board for a particular discipline.

6.2.3 Finally, one key enabler to allow meaningful dialogue between the Library and researchers about our content strategy is management information. With a collection of c.150 million items built up over 250 years, getting consistent and detailed management information about our historic holdings (beyond the individual catalogue record level) is always going to be a challenge. However, the Library’s new Integrated Library System puts us in a much stronger position to analyse our intake in new ways. For example, we are working to develop approaches that would allow us to identify our intake by broad subject areas. These sorts of developments, combined with our continued efforts to gather management information from expert consultancies and suppliers within the publishing world, will lay the groundwork for consultation and dialogue in the years to come.

Q14 Please comment on the Library’s proposed approach for developing a deeper ongoing dialogue about its content strategy with researchers (6.2.1 – 6.2.3). Are there other mechanisms we should consider?