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Collection Development in Humanities and Social Sciences: Past, Present and Future

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Abstract

Libraries are currently, and have been for several years, experiencing a period of great change. HSS (Humanities and Social Sciences) publishing faces substantial obstacles if it is to avoid marginalisation, particularly in the area of non-English language research. This paper explores the shift in the approach of libraries to collection development and how this impacts directly on authors, research output, and publishers, especially the large number of small and very small academic publishers in the HSS fields. Emerging statistical trends are examined, the variety of publishing and economic models involved are illustrated, and digital humanities initiatives highlighted - especially in the linked data environment. These initiatives can bring important benefits for the entire information chain through stronger collaboration and international partnerships. HSS publications, along with all research, needs now to be ever more visible, available, accessible and innovative to safeguard cultural vitality and heritage for future generations.

Introduction – Collection Development

Collection development, as we see it from our perspective as an Italian and European library supplier, has traditionally been a dynamic and amorphous concept. Institutions worldwide employ a range of approaches when it comes to collection development, these are often defined by national cultural perspective, framed by monetary, geographical and linguistic challenges, as well as the influence governments and administrations. In over 50 years of business we have seen the growth of the approval plans widely used in North America, the use of national policies like those in Germany and France, as well as faculty and subject specialist lead acquisitions in UK, Italy and Spain, to name but a few strategies. Working with all of these systems means that an organisation like ours is required to be flexible and we must continue to build on our long history of adapting to change.

Later in this paper, how such different approaches affect the growth of each collection and if the resulting collections differ fundamentally will be explored further. As an example of how different acquisition strategies impact on collections: Table 1 and Figure 1 show the purchasing patterns for 3 different purchasing models of 3 institutions, for 3 nations, with similar budgets for Italian history titles during the years 2014 - 2016. The graph in Figure 1 shows the similarity in the titles bought by The British Library and the Bibliothèque Nationale de France. A small number of works are held by all three institutions, the greatest number of titles held by two libraries are shared between these two, as well as them having purchased a similar number of titles held solely by each institution. The Bibliothèque Nationale de France has slightly more of these but this can be put down to their higher number of purchases overall.

Table 1 The overall number to titles purchased on Italian history 2014 - 2016 by 3 different libraries with different purchasing models, based in different countries.

Institution	Number of titles purchased
The British Library	1401
Bibliothèque Nationale de France	1644
University of Illinois at Urbana-Champaign	1699

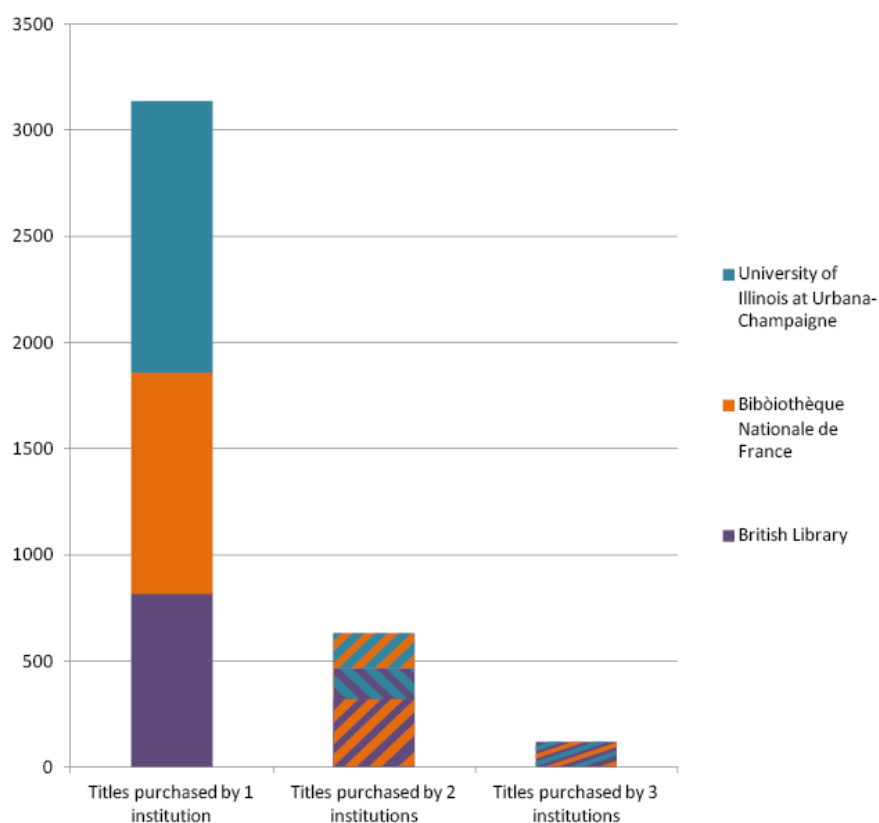


Figure 1 The titles purchased by The British Library, the Bibliothèque Nationale de France and the University of Illinois at Urbana-Champaign 2014 – 2016 broken down by the collections that they appear in.

The challenge of facilitating this range of perspectives is not eased by the Italian and Southern European publishing markets: characterised by fragmentation, marked cultural diversity and a certain resistance to change. This means that there are many factors to consider when planning for the future of collection development in this area.

7 Key factors

We have identified seven main challenges that emerged in the last twenty years for collecting academic content in the Humanities and Social Sciences (HSS) from Southern Europe: HSS/STM (Science, Technology and Medicine), foreign language, market, budget, digital evolution, metrics and metadata.

HSS/STM – the battle for funding and influence

When directly comparing the fields of HSS and STM it is generally acknowledged that they produce publications that are remarkably different in terms of format, lifetime and consumption. STM publications are overwhelmingly articles with a short lifetime that are exposed to a large readership. Whereas HSS publications are more likely to be monographs that can remain relevant for many years but may only be used by very specific communities. Sarah Tudesco from Yale presented very in-depth statistics to the US WESS group at the ALA Midwinter meeting in January 2016, focusing on the German, Italian and French language collections in the Library, which illustrated this. While we cannot of course provide similar usage

data for the books we sell we do have an interesting overview for the usage of the e-content in the Torrossa Digital Library. These are shown in Figure 2 and support the trend for older monographs observed in Tudesco’s data from Yale, with the vast majority of titles used being between 3 and 10 years old.



Figure 2 Usage statistics for titles held on Torrossa Digital Library for the years 2012 - 2017 (up to and including August).

The wider readership of STM texts has created a greater demand for this work and has seen the prices of packages and individual journals steadily increase. Inversely the average price of the comparatively inexpensive monographs is falling, placing yet more pressure on HSS publishers.

The producers of these types of literature also vary, with STM markets being controlled by large international groups and the market of HSS publications, especially in Southern Europe, being characterised by a large number and variety of small independent publishers.

The fundamental battle between STM and HSS is how, at a national and international level (e.g. within the European Union), to maximise the returns to society of investment in science and technology whilst recognising at the same time the essential contribution that HSS makes to cultural progress and innovation in general.

Foreign language

STM research is more often than not published in English to guarantee a wider circulation of the content and greater accessibility across the sector. Indeed, English has become the undeclared lingua franca for research in scientific and technical disciplines. In contrast, the language of origin is of particular importance to HSS as it has a closer and more significant relationship with the culture in which the research is rooted.

Another problem in publishing in a language other than English is the difference in the impact and reach of the research. There is a difficult relationship between publications and tenure faced by younger academics who rely on the impact of their research to gain an academic position. These aspiring researchers are judged by peer review and the impact of their work to determine its quality and efficacy. Traditionally researchers must publish high quality, highly novel work in prestigious journals if they are to advance professionally. The inclusion of an article in a well established traditional journal indicates high quality research that has undergone rigorous peer review and is of significant importance.

These higher impact journals, often published in Open Access (another thing that struggles to be widely adopted in the Southern European publishing market), like most high impact publications are in English. For the humanities this represents yet another force driving researchers away from publishing in their native language of research. This is dangerous for HSS as original-language research in particular, contributes to the documentation and preservation of cultural variety and vitality, aiding comprehension of the world in its diversity and the communities that inhabit it. Without it we risk losing crucial aspects and topics that can contribute to taking forward cultural heritage for future generations, along with an impoverishment of knowledge and a weakening of cultural diversity that could take a long time to recover.

Market

The market for HSS scholarly publications relies upon the demand and level of production from the academic community as well as publishers. The Southern European HSS publishing environment, the market that Casalini Libri has most experience in, is a complex and diverse market, consisting of a large number of varied, small, independent publishers. The sheer numbers of which are demonstrated in Table 2 using the figures for the numbers of titles profiled for customers by Casalini Libri in the last three years for the Italian market alone. The dispersed nature of this market is further underlined when the mode average number of titles for each publisher is considered, being only one title per year. This small-scale distribution mechanism is also under threat from a possible shrinking number of contributors.

Table 2 Data on the titles profiled by Casalini Libri of the 20,000 catalogued annually.

	2014	2015	2016
Number of titles	15742	15718	15594
Number of publishers	1588	1539	1474
Average number of titles per publisher	9.91	10.21	10.58

Humanities and, in particular, language departments are in steady decline. In 2013, the Guardian reported a “huge linguistic slump” in the UK as more and more universities closed their modern language degree courses. The article states that in 1998, there were 93 universities offering specialist language degrees, whereas at the time of writing only 65 universities did, representing a 30% drop, and goes on to detail that, since 2007, 11 universities have closed down all language courses entirely, with a further 13 having

dropped specialist language degrees. This would appear to be a rather bleak outlook for language studies at an undergraduate level and we cannot comment on how this has affected library acquisitions to support these courses. However, we are well placed to observe the trends in the supply of scholarly publications for post-graduate and higher study.

Southern European language titles are not included in collections solely for the purposes of linguistic study. More so for HSS studies than in other disciplines, publications not in the native language of the institution provide international and culturally diverse perspectives on a given subject. Their presence and the extent of it in a collection can be seen as a reflection of the outlook of the institution to whom it belongs. An absence indicates an exclusion of opinion, expertise and voice of others and a preoccupation with looking inward, on a single language, even a single nation. This is the antithesis of the academic ideal. To attract great minds and quality researchers institutions have to provide high caliber resources and this includes the breadth of their library collections. However, many are facing increasingly tough decisions on how to maintain this level of comprehensiveness in the future with less money.

As of the time of writing the most likely destination of the titles that we sell is the U.S., with almost half of those ending up in IvyPlus institutions, as shown in Figure 3. Even though we distribute titles globally and have strong sales in the countries featured in Figure 3, the market for sales leans heavily towards North America.

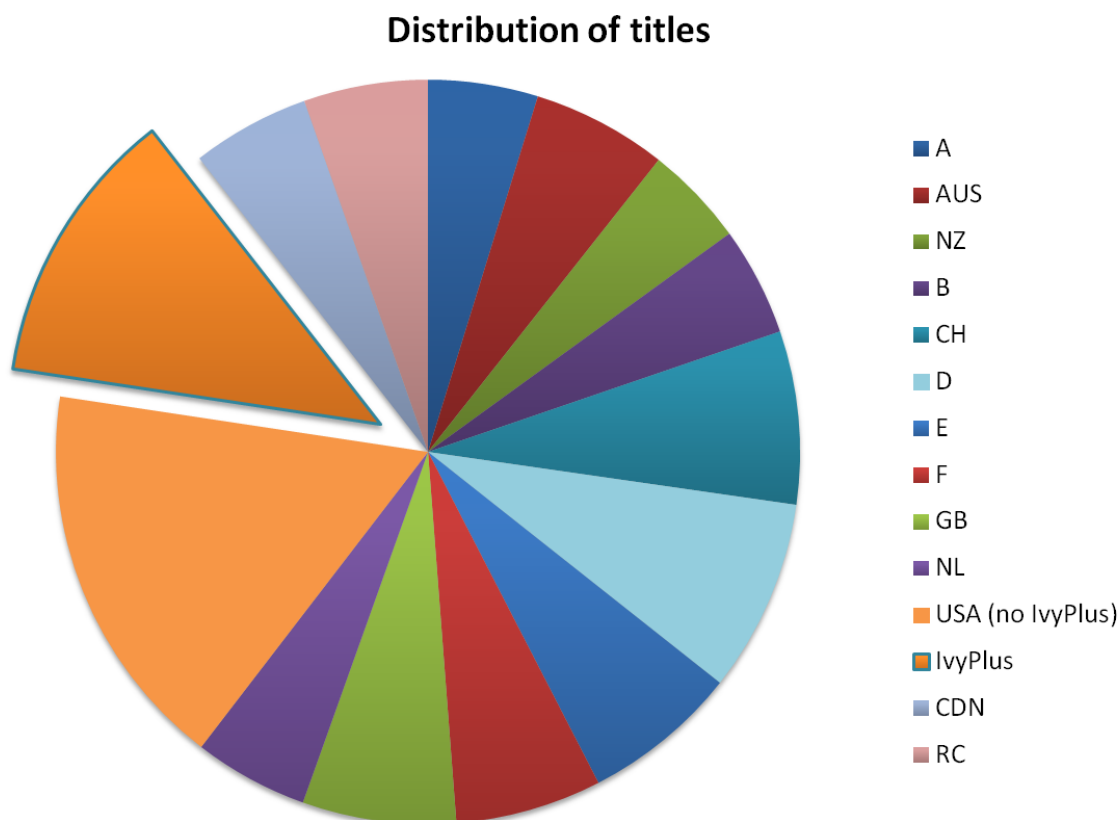


Figure 3 Chart showing the global distribution of profiled titles purchased in 2016, those held by IvyPlus institutions as indicated in the cut-away section.

The distributions of those titles profiled by Casalini Libri but not sold is also shown in Figure 4, titles classified in Deweys 1,3,5 and 6 receive disproportionately lower sales, whereas those in Deweys 2,4 and 9 received higher than expected. Of course these data only relate to our sales and may represent overall trends but do not give a precise picture of the market.

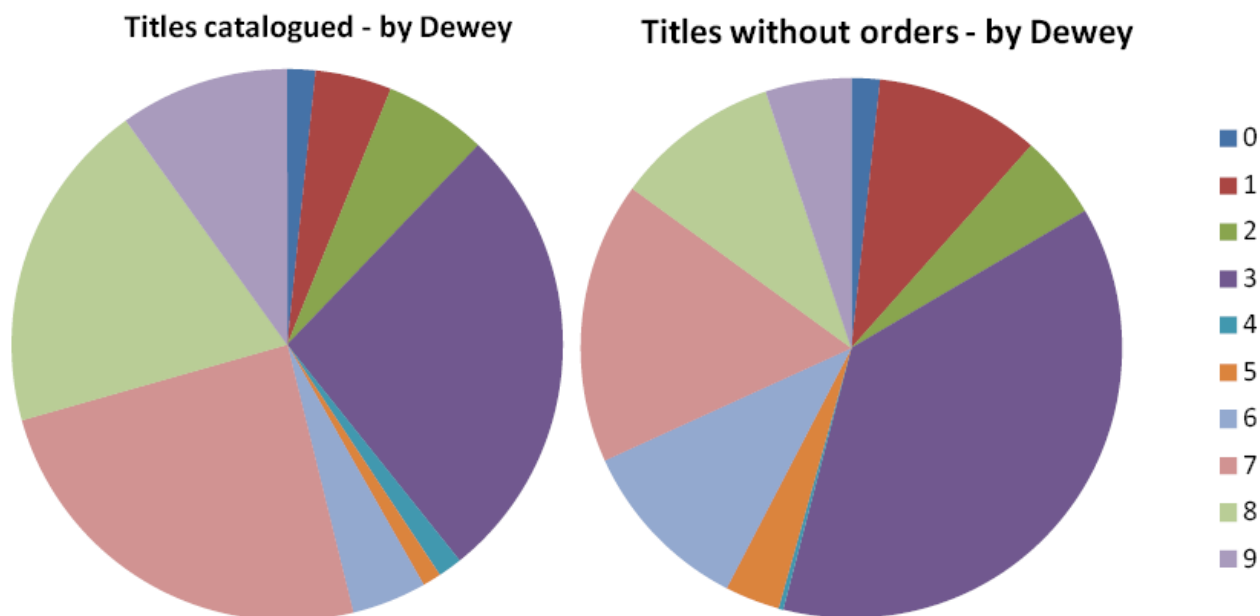


Figure 4 The chart on the left shows the distribution of titles catalogued in 2016 by their first Dewey and for comparison the chart on the right shows the titles without orders for the same time period by their first Dewey classification. The Dewey classes are as follows: 0 Computers, information & general works; 1 Philosophy & psychology; 2 Religion; 3 Social sciences; 4 Language; 5 Science; 6 Technology; 7 Arts; 8 Literature; 9 History and geography.

Budget

Internationally, across the markets that we have a presence in, we have seen library budgets continue to shrink in recent years. This became more dramatic after the global financial crash of 2008 and they have yet to return to pre-crash levels, but library budgets, as a percentage of overall university expenditure, have been declining since the 1980's. In our experience within the U.S. market smaller approval budgets of under \$5,000 *p.a.* have been particularly impacted. Of the clients with this type of approval plan 13% reduced their budget and 43% cancelled their plans entirely. The majority of larger budgets (\$10,000 - \$50,000) were more resilient and have received stable funding for the past 10 years. This may appear to be positive on the surface but these fail take into account inflation, so these libraries are in fact experiencing a net loss in funding. The pressure on library funds has further been increased by a rise in the price of materials, particularly journals. Institutions with the largest budgets have increased their funding for approval plans, moving away from internally selecting titles, as a result of a change in collection development strategy. In these difficult times libraries are forced to prioritise resources for those subjects upon which the wider institution places a greater emphasis. These topics are overwhelmingly from the STM fields. It can be difficult to justify spends on HSS resources in such an environment using current metrics.

Metrics

In this context, the whole concept of collection development and the idea of the need for a long term policy able to guarantee the purpose of the library over time has become one of the primary concerns of the Library world.

In recent years we have seen the widespread adoption of usage statistics to inform purchases. Usage statistics are necessary to track user habits and the utility of resources, although there are concerns that the general statistics currently used are not an effective tool for analysis of usage levels of HSS material.

Various standards for the provision of these statistics have been created to allow libraries to compare resources effectively, although such standards result in the need for further investment by publishers in order to assure compliance with the requisite parameters. If usage statistics continue to be the basis for acquisitions, the current parameters used will favour STM, since they have been created around that particular sector and are less applicable to HSS research. It is also argued that despite the large majority of HSS publications being consumed via traditional print formats, they are not taken into account when standard metrics are applied.

Digital evolution

From the beginning of the new century, we have assisted in the so called 'digital evolution', with the growth in the number of electronic publications and the availability of metadata for all publication formats. While the first draws much interest from the press and the general public, the latter has been a sort of 'quiet revolution', much discussed by specialists and in the library world, with a deeper impact on the collections and their development.

Casalini Libri has been among the first in HSS to accept the challenges posed by the distribution of electronic content in an academic context. Considering the nature of our work, we have been caught in the middle on more than one front: between the problems and expectations of the libraries on one side, and those of the publishers on the other; as well as between the cultural differences in the United States and Europe.

The widespread availability of content in digital format created the idea of a world where nothing will ever be unavailable. This is far from true when applied to our market, where the shift towards the electronic format has been slow and, especially for academic books and journals, far from complete, as can be seen in Figure 5. With Torrossa Digital Library we continue to encourage publishers to provide electronic version of their content, offering a solid reputation and solving some of the main problems that a publisher faces when challenged with selling electronic content to libraries (hosting, security, licensing, access and long-term preservation). We have also provided opportunities to meet among cataloguers, publishers and librarians to offer a place for discussion as a point of reference against a constantly evolving backdrop (Fiesole and Torrossa retreats). Still the growth of available academic content has not followed the same rate of the general market.

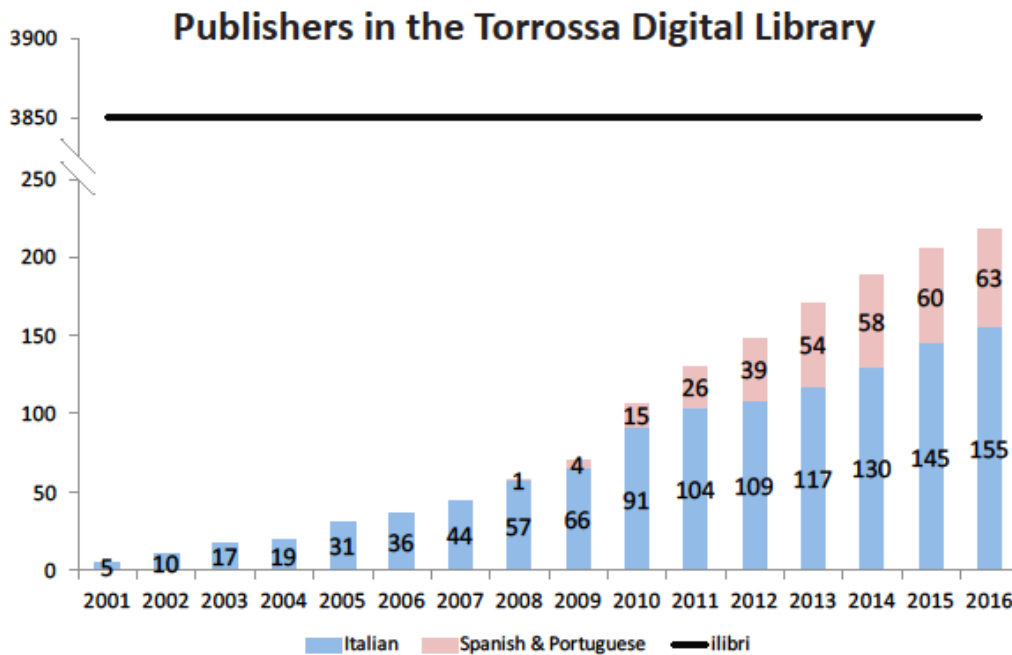


Figure 5 The number of Italian, Spanish and Portuguese publishers available on Torrossa in comparison to the number available through our ilibri.com database (which includes print formats).

Metadata

The ability to search and discover information are amongst the most interesting advancements produced by the digital evolution. Discoverability is a crucial word in the vocabulary of today’s library world. Accurate, rich and shared metadata are essential for use in catalogues, discovery tools and big data analysis projects. Identifiers and relationships allow data to be shared and used in Linked Data environments.

In our experience of collaboration with different Library Sciences Master degree programs and our participation in conferences we have acknowledged the rapid rise of these topics, with the number of test cases and projects ever increasing.

With the growth of non print material in Library collections it became clear that the AACR cataloguing standards were no longer sufficient and this led to development and adoption in the Anglo American world of the new cataloguing standards: RDA (Resource Description and Access), initially released in 2010 and particularly appropriate for use by libraries, archives and museums. It provides a new structure for the organisation of bibliographic data based on the Functional Requirements for Bibliographic Records (FRBR), with more emphasis on identifiers and relationships than on descriptions. By 2013 many major national and research libraries had implemented the new standard. In November 2016 the RDA Steering Committee (RSC, www.rda-rsc.org) announced steps toward progressive adoption of the IFLA high-level conceptual Library Reference Model (LRM, recently approved at IFLA 2017 by the Professional Committee), replacing the Functional Requirements family of models.

The changing nature of how patrons access information in the digital age has lead to the demand to move progressively toward a record-less approach to discovery. In this new era a record must be more flexible, visible and searchable. This is being made possible by employing Linked Data to enhance existing formats.

This is currently being actioned through various formats such as the BIBFRAME (Bibliographic Framework Initiative) data model.

BIBFRAME, (Bibliographic Framework), initiated by the Library of Congress and released in its first draft in 2012, is a data model uses the principles of Linked Data, is expressed in RDF (Resource Description Framework) and aims to provide an alternative to MARC (MACHine-Readable Cataloguing). BIBFRAME (www.loc.gov/bibframe) proposes three core levels: Work, Instance, Item; Persons or Corporate bodies are within an Agent relationship with the Work in the data model. While libraries hold a wealth of well organised information, the MARC format is not suited to the Semantic Web as the linear and static nature of the information it contains cannot easily be harnessed and linked to other, related resources. Version 2.0 of BIBFRAME was released by the Library of Congress in November 2016 and updates, inclusive of community input, are ongoing.

Cooperation as a solution

Cooperative acquisitions optimise purchasing while ensuring that specialised subject areas and geographical content are represented in at least one collection and therefore available to researchers. Although the practice makes perfect financial sense for libraries, it has undoubtedly had repercussions for the publishing world.

Even collaborative acquisitions programmes have suffered from growing economic pressures. The Deutsche Forschungsgemeinschaft (German Research Foundation), formed in 1951 with the aim of promoting science and research in all its branches, has recently prescribed a major change in the provision of funding for library collections. The historic Special Subject Collections ensured that at least one copy of every relevant scientific publication was available in Germany, thanks to a national acquisition profile that was distributed across 23 national and university libraries and three main specialist libraries. From 2012, this system has given way to the new Specialised Information Services, or rather: discipline-driven information provisioning, with profiles agreed by each particular scientific community, oriented towards short-term demands, aimed at the integration of digital publications and furthermore subject to successful funding applications.

Founded in 1983, Cadist was national acquisitions for research publications initiative in France. Its structure was very similar to that of its German counterpart, giving annual funds to specific libraries to collect titles on specific subjects. The programme was successful for two decades, particularly in the acquisition of non-French language materials. As late as 2004 96% of the HSS budget for monographs and journals was spent on foreign language titles (BBF 2006, number 1, Claude Jolly). However, with the coming of the digital evolution the organisation faced new challenges that it could not withstand and the programme was closed in 2014. In that same year a new collective began called CollEx (Collections d'Excellence), with an increased accessibility of funds to a wider group of institutions, an emphasis on electronic content, hybrid collections, national licenses and the sharing of metadata. The allocation of funding for CollEx covers a longer period of time, 4-5 years instead of the annual budgets for Cadist. This allows institutions the freedom and vision to plan their collections in the longer term.

Collaborative collection is an ever increasing area of interest for libraries as is indeed illustrated by over 25% of the posters at this symposium focusing on the subject. In 2015, 63 shared print programmes were registered in WorldCat. However, for the geographic areas that we cover, they have not yet been widely adopted possibly due to the marginality of Romance languages in collections and the smaller benefits it would produce. What does emerge from the collection development literature is that it is very likely that foreign language collections will be considered as special collections and indeed, if one considers study on the preservation of rare and special collections, it seems logical that the same metrics would be applied to the collection of foreign languages as they are unique and distinct collections. Our direct experience with shared collections is to date limited to that of the individual vision and strategy of neighbouring institutions such as Stanford and Berkeley and the University of Colorado and Denver. We are also very much involved in a particularly interesting project with the Manhattan Research Library Initiative (MaRLI).

MaRLI is a joint borrowing program between the New York Public Library (NYPL), New York University and Columbia University, established in 2011, which serves as a means to expand access to their research collections in order to better serve their researchers. Doctoral students, full-time faculty and librarians, and approved NYPL cardholders with a demonstrable research need not met by currently available resources, are permitted to borrow materials from all three institutions. This initiative is an example of truly collaborative collection development that places a strong emphasis on sustainability, not just of the collections but of those resources that supply them.

The programme's approach to the acquisition of Southern European Language titles is an example of this. As with many areas of the collaboration NYPL acts as a repository for the print titles, holding them at a facility shared with Columbia and other institutions, whilst the program aims to increase access to e-content across the three institutions. All of this is done with the assistance of an external vendor (in the case of Italian language titles, Casalini Libri), while maintaining historical expenditure on these materials to sustain and support selected publishers.

MaRLI members NYPL and Columbia University are also working with Princeton University to manage a shared storage facility, ReCAP (Research Collections and Preservation Consortium), part of a national network of shared-print repositories. In 2012 these institutions developed a strategy for creating a shared collection from among the materials held at ReCAP, allowing them to remove excess copies of titles from their own collections. The overall aim is to expand the partnership from management of a shared space to form a truly collaborative print collection. The ReCAP Shared Collection, consisting of selected materials already held at the facility and additional materials partners deposit in the future, will be managed, retained and shared by the three libraries.

It is of course impossible to talk about collaborative collections and not mention Dan Hazen, whose vision shaped a generation of librarians and indeed continues to impact collection development strategy. This time last year Harvard hosted a symposium in Hazen's honour dedicated to this very subject. A summary of the event is given in *The Transformation of Academic Library Collecting: A Synthesis of the Harvard Library's Hazen Memorial Symposium* and all the papers are available on the Harvard website at <https://projects.iq.harvard.edu/hazen/presentations-papers>.

What emerges from this important event is the leading role the Ivy Plus (the 13 libraries of Brown, Chicago, Columbia, Cornell, Dartmouth, Duke, Harvard, Johns Hopkins, MIT, Princeton, University of Pennsylvania, Stanford, and Yale) plays in shaping the future of collaborative collections. Coming from a long experience of collaboration through a scheme known as Borrow Direct, in July 2016, the group named Galadriel Chilton

as Ivy Plus libraries director of Collections Initiative. The Ivy Plus collections vision statement clearly lays out their mission 'to embrace a vision for collection development and management which recognises our preeminent academic research and special collections as one great collection in support of the teaching, research and public missions of our respective institutions and the global scholarly community. ' (the full mission statement can be found at:

<https://drive.google.com/file/d/0B7lg8dnXGKcKUnBNTk9JalZ1R0k/view>).

The 2016 publication *Shared collections: collaborative stewardship* edited by Dawn Hale, also addresses, in great depth, through a series of thought-provoking essays and fascinating case studies , the complexity of collaboration. Several important aspects emerge from this study:

- Collaborative collecting for monographs is still in its early phases
- Do costs involved in structured collaboration make long term sense?
- Who provides governance?
- The absence of aggregated record management systems

This last point was also a great concern of Hazen's and indeed his essay *Provocations and Irritations for the Globalized Research Library* ends with the question :

how can area and international studies community participate in designing tools and services that will energize the information sources and aggregations most relevant to its concerns?

And again mentioned in his nine models for collection development where no. 9 is

Embrace discovery and analysis as today's collection development.

And in this context Hazen provocatively asks:

Do we lack better tools because we have abstained from this discussion, lack of expertise to construct meaningful metrics or in fact engage in activities that carry little value?

It would appear that this challenge has been taken up by another visionary librarian in our community Philip Schreur from Stanford University. Schreur , along with an important group of US libraries, has been questioning the fundamental uses of metadata. He also leads the LD4L (Linked Data for Libraries) and LD4P (Linked Data for Production) Mellon funded projects focusing on how significant advantages can be brought to the libraries and end users with metadata.

We were first approached by Schreur to update our already robust bibliographic data into a BIBFRAME linked data environment. Discussions then led to further developments together with our partner in software development @cult, who specialise in the fields of the libraries, archives and museums.

After a period of feasibility analysis in 2016 we began the SHARE-VDE (Share Virtual Discovery Environment in Linked Data, www.share-vde.org) project with Stanford University at its helm, a library community driven research and development project to establish entity identification, reconciliation and conversion processes as well as a prototype of a virtual discovery environment with a BIBFRAME three layered architecture (Person/Work, Instance, Item). Furthermore, the project involving 16 North American libraries will create a database of relationships that is open to the community and a common knowledge base of

clusters that uses the paradigms of the semantic web but also allows the libraries to continue to handle their data as independently as possible.

In terms of outcomes for partner libraries the project aims to create an environment that is useful for both library patrons, empowering them with advanced discovery interfaces, and librarians, incrementally providing them with cataloguing functions in native semantic web standards, integrating processes with the local systems, and implementing tools in a collaborative environment. SHARE-VDE also hopes to help to reveal a richness within the data of existing collections, often hidden or unexpressed in a traditional catalogue.

The SHARE-VDE research and development project is one of the first examples of the practical application of BIBFRAME and the group is in the process of running several use cases for the application of the technology to scenarios proposed by the library community. SHARE-VDE is currently concluding phase 2 with the processing of approximately 100 million authority and bibliographic records from the participating libraries.

The future

How the collections will be defined, shared and shown in the digitised future of Linked Data?

We have the privilege of being part of library workflows across the globe and embrace the opportunity offered by the symposium *New Directions for Libraries, Scholars, and Partnerships* to begin a conversation on collection development at a global level. The diversity in approaches to collection development internationally provides the foundation for productive discussions about how best to plan for the future. These are unlikely to result in a 'one size fits all' solutions, but by sharing experiences at a national and global level, with contributions from those with unique view-points, such as Casalini Libri, libraries will be able to set the best course for themselves. For many that journey will be taken with partner institutions to maximise the spending power of shrinking budgets and to continue to grow rich, valuable collections. In the case of the Romance languages this means maintaining collections that expresses the precious diversity in the wide spectrum of disciplines that embrace original language research.

To remain relevant libraries face many challenges when considering their collections. The importance of the materials contained within cannot be underestimated but in the modern era the ability for library patrons and others to access the contents may prove to be the greater challenge. Casalini Libri, over many decades has become fully integrated into our market, acting as a bridge between publishers and libraries, acquiring a unique set of competencies. This skills allow us, along with other vendors in a similar position, to assist in finding solutions to these problems, helping libraries to maintain their relevance, the individuality of their collections and meet the needs of the patrons that they serve. We operate within a specific market with some unique characteristics but there are many more voices, with different experiences, that need to be included in the dialogue.

Survival of HSS

In the more than five decades as a vendor of HSS scholarly publications Casalini Libri has come to truly understand the importance of innovation and collaboration. Over the years we have made them central to our organisation and our mindset. We believe that these principles must remain the foundations of our community as we move forward and that they offer the best hope to maintain a global vision of Humanities and Social Sciences publications in the Southern European languages.

Conclusions

To conclude, collection development in the Humanities and Social Sciences has seen a great deal of change in recent decades and if it is to survive it must continue to evolve. The data that we have included in this paper offer a snapshot of a section of one unique market from one organisation's perspective. They highlight the reluctance within the HSS sector to adopt digital formats, the global distribution of HSS Southern European language titles, as well as how different acquisition strategies can, in fact result in quite similar collections. Our figures do bear out some trends in the wider literature but also serve to illustrate some of the distinctive characteristics of the world of Romance language publications.

There is much literature concerning vendors' margins and business models but it is notable that the vendors' intellectual contribution in collection building does not emerge from the literature. The rather unique viewpoint, which some specialised vendors possess, of different collecting habits worldwide is a resource often underutilised by the library world. This insight is also key for the creation of sustainable business models that take into account the roles of all stakeholders and ensure the presence of niche publishers.

Libraries are faced with the seven key challenges of the battle for funding and influence with STM; language differences; the nature of the publication market, budget restrictions, the implementation of usage metrics; the digital evolution and the advent of metadata if they are to succeed. To overcome these hurdles we believe that the community must engage in greater discussion on collection development at a global level, to discover which models work for certain types of institutions and to accelerate the levels of innovation within the community. These are the forces to give collections the momentum to move forward into the next decade and beyond. Today's meeting leads us to hope that the driving force of industry leaders can take forward the challenge of collaborative collections – especially in those areas that risk marginalisation – at a global and not simply national level.