OCLC PRESENT AND FUTURE†

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I welcome this opportunity to speak to librarians and educators in the Republic of China and to visit the impressive National Central Library, National Taiwan University Library, and Tamkang University Library. Many of you have expressed interest in what OCLC is doing and what it plans to do in library automation, information technology development and international resource sharing among libraries. Thus, in the few minutes we have today, I will focus on OCLC’s perspectives and activities. I make no claim to provide you with either a learned treatise on library automation or a profound inquiry into the implications of rapidly changing information technology on the future directions of education, scholarship, public policy, international cooperation and development and personal development, although perhaps we are all anxious to address these important issues.

The need for information is transcendent. It recognizes no boundaries, be they geographic, language, political, age, intelligence, social status or level of learning. The need is pervasive. OCLC’s history exemplified this. The organization rapidly grew beyond its home state of Ohio in the early 1970’s, spreading by demand and always with a waiting list of libraries wanting to join, to all of the 50 states in the United States and now beyond the United States. This is the reason for our being together today.

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What is OCLC and what makes it different from other organizations?

1) It is a not-for-profit organization. While it is a corporation, with its own board of trustees, its own resources, staff and charter, OCLC is a cooperative membership organization whose members are libraries, or at least institutions who have libraries as an important part of their services and mission. Librarians are directly represented in the governance of OCLC on the Board of Trustees, a formally chartered and elected Users Council and many advisory committees.

2) It operates an international computer and telecommunication network for over 6,000 libraries in the U.S., Australia, Belgium, Canada, Chile, Denmark, Finland, France, Ireland, Saudi Arabia, Sweden, Switzerland and the United Kingdom. Negotiations in various stages are ongoing in several other countries, as well.

3) It hosts a database of nearly 14 million unique bibliographic records — with some allowance for duplicates that result from human error and are constantly being identified and eliminated by both software and quality control efforts by professional staff. Formats included are monographs, serials, maps, musical scores, audiovisual materials, manuscripts and a growing number of other items. The data-base grows by over 30,000 records per week.

Using this data, libraries acquire and catalog new materials and convert existing eye-readable bibliographic catalogs to machine-readable records to support library
automation. They also order catalog cards and machine-readable tapes of their records, and, as part of our Chinese-Japanese-Korean (CJK) capability, which I will mention later, they can produce cards and records at their work station. Libraries are also able to acquire materials online, and OCLC provides stand-alone acquisition and serials control systems.

4) Libraries also have online access to well over 200 million "holdings symbols" that are attached to the unique bibliographic records and that indicate the libraries that own the item described in the record. These holdings symbols, together with OCLC's online interlibrary lending system, support the largest international lending system in the world, with over 10,000 transactions a day. Of course, this statistic is only the tip of the iceberg, inasmuch as searching this rich location holdings database enables very significant interlibrary lending to take place throughout the world through telex, mail and other communication links. Our direct linkage with the British Library Document Supply Center (formerly the British Library Lending Division), as well as with a number of other national resource centers, is constantly expanding the capability of the OCLC database and the interlibrary loan system to serve a global constituency.

5) While 70% of the 14 million bibliographic records in the database represent imprints in the English language, the remaining four million-plus records contain material in over 300 languages, including significant holdings in Chinese and Japanese. With our new CJK program, and with the collaboration of libraries collecting Asian materials both here and in Japan, North America and
Europe, we expect to see the number of records for Asian materials in the database grow significantly, both for currently acquired materials and for older materials through retrospective conversion projects.

6) OCLC members include academic, public, school, governmental (national, state and local), corporate, law, medical, theology and other special libraries and museums.

7) OCLC's goals have, from the beginning, been to reduce the rate-of-rise of per-unit costs in libraries and to increase the availability of worldwide library resources to library patrons (let me emphasize here that our ultimate goal is always to serve the user, a fact that the library world frequently forgets). Modern electronic technology is making possible a more personalized service to library users and is, at the same time, facilitating easier access to materials.

The combination of these unique capabilities, resources and goals is what differentiates OCLC from the other bibliographic networks that operate in the United States and elsewhere.

OCLC can also be differentiated from other bibliographic networks by the excellence of its staff, which is experienced in managing and operating a unique and exceedingly large and complex collaborative enterprise that has stood the test of time and achieved unparalleled viability. OCLC can now offer to scholars of other nations, not only access to its system and its resources, but also the experience of its large and uniquely qualified staff and its significant research and development activities.

Today, with the bibliographic contributions of some 5,100 member libraries and some 2,500 other libraries that participate
indirectly through a variety of OCLC programs, OCLC's database has become a resource of incalculable value to those who need to know what material exists and where it is located. With a computer/telecommunications system that can transmit information from the database about "what and where", the value of OCLC to scholarship is still further enhanced.

For all of the reasons I have cited above, OCLC has become an international resource of enormous importance and worth and has drawn the interest of a large number of institutions and agencies outside of the United States. We have been approached and visited by delegations or representatives from almost every major country to learn about OCLC and to explore how they might work with us. We, in turn, have visited many of these countries and institutions to build on these beginnings. We hope to accelerate this activity in the Republic of China during our visit here.

This "internationalization" of OCLC is entirely consonant with the OCLC mission. Our corporate charter speaks to the "... fundamental public purpose of furthering ease of access to and use of the ever-expanding body of worldwide scientific, literary and educational knowledge and information."

Many of the national and university libraries in Asia, as well as those in the Americas, Europe, and Australia, house some of the richest bibliographic resources of the world's cultures. In extending its benefits beyond the United States, OCLC expects to expand vastly its identification of scholarly materials and to gain bibliographic access to the treasures of some of the oldest and richest library collections in the world. Such extension will facilitate the cataloging and identification of holdings of current reference and research materials in various languages, materials that are of interest to governments, research organizations and universities in our global economy. But our reasons for seeking international involvement go far beyond simply creating a data-
base that is international in scope and in use. Our hope and our aim is to establish a network of collaboration that can provide the basis for even more exciting opportunities for resource sharing among the educational and research organizations of the world, that will facilitate document delivery and electronic publishing, and that will foster collaborative research. The cooperation that occurs benefits scholarship, research and education.

Our basic global strategy can be described as follows:

- Approaching relationships and system and database use in a flexible manner that considers the nature of the local political environment and the nature of the parties involved, taking into account the fact that both the environment and the parties may be sharply different from those in the United States.

- Incentives to enter original records into the OCLC database.

- Technological assistance and adaptation of OCLC proprietary technology to local hardware and software — helping create local counterparts of OCLC.

- Cooperative development of local — or even national — systems.

- Cooperation with local telecommunication monopolies.

- Use of the OCLC interlibrary loan subsystem and eventually document delivery.

- Exchange of research results, exchange of personnel, and collaborative research and development, including
visiting scholars and interns.

In all cases what OCLC wants is records to expand the OCLC international database and sufficient revenue to recover its costs.

Before I leave this part of my talk to move on to our new international initiatives, I should mention a current barrier to the effective use of OCLC by libraries outside of the United States. Today we operate from 4:30 a.m. until 10:00 p.m. Eastern time in the United States. For Taiwan this would be 4:30 p.m. until 10:00 a.m. This is highly inconvenient for you, but we hope within a year or so to be operating — at least our cataloging and database searching system — practically 24 hours a day. Moreover, within a couple of years, you will be able to catalog from our system on laser disc located within your own library, and you will become time and place independent of OCLC — but always with the obligation to support and maintain the international OCLC database to serve scholars, researchers, educators and students everywhere.

New International Initiatives

The phases we are going through in defining and implementing our international strategies are consultation, program appraisal and association.

Consultation. We have already met with and are continuing to meet and work on collaborative arrangements with senior members of library and educational communities in almost twenty countries. My associate, Andrew Wang, who has, as one of his important tasks, our liaison with the Asian scholarly community, has visited such institutions here several times, and we have been favored by visits of representatives
from the Republic of China, the Chinese Mainland, and from Japan, Australia, Hong Kong, and Singapore. During this current trip, we are focusing our efforts on the Republic of China and Japan because each already has a strong position in information technology, a growing industrial economy, a telecommunications infrastructure and a library "tradition."

Our goals in these efforts have been:

- To inform and to be informed
- To establish personal and organizational relationships
- To identify and explore areas of opportunity
- To identify areas of mutual benefit
- To initiate mutually agreed programs of collaboration

Program Appraisal. In appraising the programs that seem to be of interest, OCLC must consider the feasibility and cost of product "customization," as well as local marketing modes, support structures, and the appropriate telecommunications or delivery strategies, and we must review local political, constitutional, technological and convention (i.e., standards) factors, any of which may be a barrier to further OCLC progress in the institution or country. We must also deal with issues of conversion of MARC formats, transliteration of vernacular to Romanized forms and back, where appropriate, different subject headings and authorities, language translation, and international standards that will all appropriate linkages to be made.

Association. OCLC is seeking to develop an awareness of its services in the international library and educational communities. Our extensive participation in past conferences of the International Federation of Library Associations (IFLA)
has enabled us to build bridges with the world library community. The forthcoming 1986 IFLA conference in Tokyo with its expected large attendance of Asian participants will enable us to broaden our involvement in this area.

OCLC staff will become more involved in international programs. For example, they are increasing their participation in international bodies such as IFLA and the International Electronic Publishers Association, in international standards organizations and in international seminars and conferences.

As a result of visits by OCLC's Andrew Wang to the National Central Library and visits to the United States from representatives of the NCL, a cooperative agreement was entered into in July of 1985 with the NCL for an exchange of records. At the same time, we initiated an International Librarian Internship Program, and our first intern was a librarian from Hong Kong Polytechnic.

The adoption of automation by the major libraries in Asia, the United Kingdom, and Western Europe brings all of these institutions face to face with the daunting task of converting their bibliographic records to machine-readable form. Unique opportunities are now arising from mutually beneficial collaboration between national and research libraries and national and international bibliographic resource centers. All of the institutions and agencies we have dealt with have acknowledged the richness and the breadth of the OCLC International Online Union Catalog, and all were anxious to evaluate the feasibility of utilizing that catalog as a source for the conversion of their own bibliographic records. None of the librarians we talked with envisaged a relationship with OCLC as simply one-sided. All are eager to contribute their original records to the OCLC international database.

The singularity of OCLC's opportunity is self-evident: during the next decade most of the major bibliographic resources in the
western world will be converted to machine-readable form, and OCLC is establishing the world’s foremost online bibliographic and scholarly resource by building from these many collections “the database of databases.” To accomplish this OCLC must establish partnerships of mutual benefit with national and research libraries worldwide.

**Taiwan.** I have already mentioned that as a result of an exchange of visits and much correspondence, a cooperative agreement was entered into between OCLC and the National Central Library in July of 1985 for an exchange of records. We are, in addition, negotiating with National Taiwan University to join OCLC and to undertake a pilot retrospective conversion (RETROCON) project to be done by OCLC’s RETROCON Services in the United States. Similar negotiations are under way with Tamkang University. Our CJK automation program will be a factor in these three areas, but there will be greater interest on the part of Asian countries in Western materials than in CJK materials, and greater interest from OCLC members in Chinese, Japanese and Korean publications.

**Japan.** We are exploring various alternatives with the university libraries and with other organizations that serve the broader library community in Japan and hope to be able to have established an appropriate service organization to support those libraries by the time of the 1986 IFLA conference in Tokyo.

Our primary goal in developing and pursuing an international strategy has been, as I have already indicated, the enhancement of the OCLC database, but equally important is the establishment of new and mutually productive relationships throughout the world,
and it is from this aggressive posture that we have been dealing. Joint venturing, cooperation and collaboration are the keywords in this international strategy. OCLC has an advantage as it is perceived as neutral — it is neither the servant of government nor mastered by capital. Frequently, it can move more quickly in exploring the rapidly developing technologies than can government, and, in developing more creative collaborative relationships to meet educational and public information needs, it can often move more expeditiously than can strictly commercial enterprises. Moreover, by its public purpose educational charter, it will seek to support sectors of scholarship and inquiry that are not likely to be the focus of the commercial sector of our economies as they seek new investment opportunities.

All of this brings me to what I see as OCLC's future role in international networking. Bibliographic control on a national scale was one of the earliest goals of OCLC and its membership; international cooperation is a current goal.

However, as they face difficult and often bewildering choices and decisions in education and in library and information automation in a rapidly changing technological environment, educators, academic administrators and library users are concerned, not only with bibliographic control, but with broader goals that focus on access, economics and other issues.

In recognition of this broadening of interest, OCLC will move beyond — notice I did not say "away from" — bibliographic control to access; that is, physical access to substantive information. In a continuum, we will provide more effective resources for the user, including subject search, we will explore how abstracts and reviews can be added to the bibliographic records, we will provide an intelligent gateway (UNISON) to a variety of databases, we will develop reference services, both online and distributed, facsimile transmission, electronic journal delivery through our Graph-Text program, and electronic full text searching and brows-
ing of monographs and journals, in concert with local library systems and through our project EIDOS (Electronic Information Delivery Online System). Most of these services will involve, and in some cases heavily depend upon, some form of optical-disk memory for more powerful workstations and distributed software.

A growing strategic area of development is our local and micro system activity. Through the use of mini- and microcomputers and local memory and accessories, we are involved in distributing activities to the local site — "empowering the user" — whether it is a cataloging or interlibrary loan software enhancement, an M300 terminal, a local serials control system such as our new SC350, the MICROCON approach to retrospective conversion, or the LS/2000 local integrated library system. Our CJK workstation is a prime example of this. Much of our research and development is focused on this capability. It enables us not only to empower the user at the workstation but also to reduce costs and save on telecommunications. Present efforts are being developed to network these local workstations and provide more powerful memory, including optical laser discs.

Finally, let me close on the note of the changing role of the library in education, research and public institutions and government. Librarians and libraries have been the storehouses and providers of knowledge throughout civilization. In the expanding information revolution that is taking place throughout the world, this proud, age-old tradition of librarianship can be an important facilitator in both the transition to electronic access and the preservation and integration of our printed heritage.

We are working closely with representatives of education and culture, university presidents and chancellors, chief academic officers, scholars, computer centers, library schools and librarians to explore the development of an exciting new educational infrastructure in which OCLC can play a vital part in the future.

You can see that we have set an ambitious course for our
future. We will maintain our collaborative character and our concern for libraries and education. We will increasingly focus on how we can assist libraries in better serving their users. And, of course, we will continue to expand our vision to a global one. We are counting on you to assist us in this cooperative venture.