



Horizon Scanning: Initial Report 2006

This paper identifies three major issues which have been raised and explored through the Horizon Scanning Process in 2006. It also notes, in headline form, some other topics which have been identified through this process. Finally, a list of documents which have contributed to the Horizon Scanning process, along with web links, is attached as an appendix so that anyone with an interest in a particular item can access these easily.

This information is intended to contribute to, and inform the decision-making process for the 2007/08 budget, and will be built on further to assist future NLS strategy development.

1. Technological Change

Issue: how can NLS keep pace with the increasing rate of technological change?

Clarifying the Issue:

- Is NLS equipped and able to respond to, adopt or use new technologies?
- How do we balance maintenance of traditional services with development of the new?
- How cutting edge - or circumspect – should NLS be in uptake of technology?
- How agile is NLS capacity for organisational development?
- Does NLS need to change the pattern of staffing, finance and other resources more quickly than it does at present?

Implications for NLS:

NLS needs to be more 'agile' in being able to respond as an organisation to new technologies and adapt staffing, work processes etc more quickly.

- Budgeting/planning/decision-making
- Human Resources/staff development
- Information management/horizon scanning/risk management.

Possible Responses

There are two sides to the required NLS response: firstly identifying technological change, and secondly being able to change effectively and quickly when necessary.

- Horizon Scanning process to maintain contact with technology foresight centres
- Six month report from HS group to SMT on technological changes
- HR strategy to take account of new skills/competencies in recruitment, staff development etc.
- NLS Review Programmes and continuous improvement (i.e. Best Value) to include structured assessment of new technologies and implications.

2. The Search Industry

Issue: how has the 'search industry' altered user expectations and perceptions of access to information?

Clarifying the Issue:

- How have the expectations and behaviours of researchers and library users been altered by their use of services such as Google, Yahoo! etc?
- How should NLS respond to these expectations?
- Should NLS work towards providing services that reflect user expectations, or maintain 'higher standards' of information provision via other means?
- Can/should NLS do both?

Implications for NLS:

- Market research
- Digital library/web services
- Cataloguing/metadata policy and practice
- Reference services/enquiries and other customer services.

Possible Responses

- Increase digital content (mass digitisation) of unique/special NLS collections, using project funding, commercial sources or Purchase Grant funds
- Make NLS data visible (including catalogue records) to Google, Worldcat etc
- Adopt user-friendly front ends to digital services ('look inside this book' etc)
- Maintain expertise in 'beyond Google' search and retrieval, to provide added quality for specialist researchers
- Develop a NLS federated search function for our users, endeavouring to make searching more user friendly, whilst still retaining the quality of the results
- Maintain market research programme on user/researcher behaviour and expectations.

3. Intellectual Property (IP)

Issue: Ownership of knowledge is fast becoming *the* key driver to economic development in the post-industrial global economy. Despite (or because of) technological change, the ownership of knowledge is becoming more restricted and less accessible to users and those who provide information.

Clarifying the Issue:

- Publishers are increasingly applying restrictive IP rights for commercial purposes
- At the same time, there is also growth in Open Access publication which challenges IP conventions
- Current IP legislation may not be sustainable
- Should NLS become more politically active, lobbying for changes to be made to legislation that affects our role and services? Could NLS lead the development of national licences to help make resources more widely available?
- Should NLS revisit assumptions on services we provide through reading rooms, such as how we assess the risks of potentially infringing copyright?

- How do we maximise the contribution of projects such as IRIScotland and the TDR to provide the best access to knowledge, management of digital rights, licenses etc.
- Note Andrew Gowers' Review of Intellectual Property, December 2006.

Implications for NLS:

- Public affairs/lobbying
- Review service assumptions re copyright
- IRIScotland and TDR.

Possible Responses

- NLS should adopt a clearer stance on IP issues and seek to lead the sector's responses and outlook on IP issues
- Adopt, endorse and promote the BL IP manifesto
- Challenge the current IP situation more actively, seeking to initiate discussions and debate on the issues and the future of IP in Scotland, through forums like CILIPS, SLIC, SCURL etc.
- Actively lobby (the Scottish Executive and Parliament, Westminster, and European union) to change IP regulations for public benefit as part of the NLS public affairs programme
- Review reading room practice re copying, fair use etc periodically to ensure that NLS customer service maintains correct balance between risk of copyright infringement and meeting user needs, within the law.

Other Areas Highlighted by Horizon Scanning

Social Change: levels of obesity, depression and debt are increasing; how will this affect our services and service provision?

Changing Populations: level of immigration is increasing rapidly, especially with the changes to EU policy; how will this change the way NLS will have to function to service new user groups?

Energy Shortages: cost of supply is likely to increase; reliability to decrease; what implications will this have for society as a whole and NLS in particular?

The “want it now” generation: people who have grown up with technology and have expectations of ease of use and speed are our users of the future; how should we respond to and meet their expectations?

Small Smart Countries: as a small country, can Scotland broker deals and arrangements for public benefit that would not be possible at a UK wide level?

Scale of Decision-making: With the rise in globalisation, developments are taking place at the local, Scottish, UK, European and worldwide scale; how should NLS respond and contribute to decision-making at the appropriate levels?

E-Learning: digital content is becoming widely available through other means such as the Open University and BBC, who make educational content available online free of charge which people can access and utilise; how do we respond to this?

Digital Preservation: not only technical aspects, but also legal, political and educational, such as limited rights to make preservation copies due to format, licence and contract restrictions.

Appendix 1: References for Highlighted Issues

Below are listing of articles of interest for each issue captured by the Horizon Scanning process. The source articles are stored on the NLS Intranet.

Technological Change

- Big picture on Microformats By [John Allsopp](#)
- BT online vault for digital valuables By Marianne Barriaux
- European open access network By Tracey Caldwell
- IT use by companies and energy shortages By Nic Fildes
- Public Library's Google WiFi enabled bookmobile
- Recorded history and email By Ben Fenton
- US cedes control of the Internet By Kieren McCarthy
- WiFi in public libraries Report By Civic Regeneration and Information Management Associates.

The Search Industry

- Google's customisable search engine By Richard Watersin
- Google handwriting By [Chris Williams](#)
- Google news archive By Mark Sweney and Richard Wray
- Microsoft worming into Google's territory By [Gemma Simpson](#)
- Public Library's Google WiFi enabled bookmobile.

Intellectual Property

- BL Intellectual Property manifesto PDF By the British Library
- Unbounded Freedom, a new look at IP
- Unbounded Freedom PDF By Rosemary Bechler.

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