Networking Portuguese academic libraries: past, present and future

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THE PAST

From professional meetings to the first attempt of establishing an academic library network (80’s and 90’s)
Professional Meetings

- Meetings of Academic Libraries (Jornadas das Bibliotecas Universitárias)
  - 1988 (Porto) – Librarian Careers and Automatization
  - 1992 (Lisboa) – Approval of document sent to Portuguese Rectors Council (CRUP) on the foundations for cooperation (“Bibliotecas Universitárias: alicerces para estrutura de cooperação”)
In 1997 Rectors of the Portuguese Rectors Council (CRUP) appointed their representatives to prepare and present the main orientations for a future network of university libraries, called RUBI.
University Network of Libraries and Information: RUBI

Bem-vindo à
Welcome to
Rede Universitária de Bibliotecas e Informação

<table>
<thead>
<tr>
<th>Destaque / Highlight:</th>
<th>Relatórios Finais dos Grupos de Estudo</th>
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<tr>
<th>Anteriores / Former Highlights:</th>
<th>Proposta de Regulamento</th>
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Seminário
"Bibliotecas Universitárias em Consórcio"
26 e 27 de Abril, 1999
(Relatório Final)

[English]  <- Way In / Entrada ->  [Português]
RUBI & Cooperation with Macau

In December 18th 1998, in a meeting held in Lisbon with librarians from different public Portuguese universities and the University of Macau, an informal cooperation agreement was proposed to help librarians working overseas in dealing with documents in Portuguese language. This site, Orientações, maintained by Coimbra University Central Library (Biblioteca Geral da Universidade de Coimbra) is the materialization of such a purpose. The RUBI (Network of University Libraries and Information) Project, sponsored by the Portuguese Council of Rectors, hosts the site and is maintained by the Aveiro University Documentation Services. The University of Macau will provide soon a mirror for users in Far-East Asia.

Contents

If after searching the Portuguese cooperative catalog PORTBASE or the online catalogues of the Portuguese university libraries linked by Orientações, you still have unsolved problems, you can ask any librarian whose e-mail is in the Directory or, colectively, all the subscribers of our Distribution list (WARNING: the Mail list and its Archive MAY CONTAIN texts in Portuguese or Chinese character sets). Other resources that we will try to compile here in Orientações, will be links to authors, Portuguese and Brazilian literary e-zines, language dictionaries and other software links available for purchase or download.

Credits

The Portuguese Council of Rectors (Conselho de Rectores das Universidades Portuguesas/CRUP) has been since the very first moment a great supporter of this project, that is also within the spirit of the Aveiro Chart (Carta de Aveiro) aproved at the 3rd International Meeting of Portuguese Speaking Librarians (III Encontro internacional de bibliotecários de língua portuguesa), organized in 1988 by the Portuguese Library Association BAC. Since May 6th 1999, the mailing list is supported by the Portuguese National Library in server.

Last updated: 08-06-1999
Online in RUBI since: 06-01-1999
Date of the site creation: 30-12-1998
University Network of Libraries and Information: RUBI


  - Several Working Groups established
    - WGs on main services (Catalog, EIB, etc.)
    - WG on Statutes and Regulation
    - WGs produced sectorial reports
University Network of Libraries and Information: RUBI

- By May 1999 everything was ready...
  - Statutes approved (May 5th 1999)
  - The Council of the Foundation of Portuguese Universities (FUP) as officially recognized RUBI (May 12th)
- But the first General Assembly (scheduled for April 2000) never convened...
- ...And after presenting its Final Report (May 2000) the Organizing Commission ceased
Main reasons for RUBI failure

- Big rotation of Rectors (CRUP) in 1998/99, and transfer of RUBI from CRUP to FUP
- Lack of clear funding plans
- Internal problems/weaknesses in several universities, resulting in low engagement in cooperation
- Lack of strong leadership
Cooperation and networking in practice (2003-present)
B-on

- Discussions at CRUP for the creation of consortia for electronic resources (2002-2003)
- Portuguese government (UMIC) establishes “Scientific Digital Library” (Biblioteca Científica Digital) with full text access to around 6000 journals
B-on

- 2004 - Formal creation of B-on

- Growing number of resources licensed, participant institutions and usage

- Centralized governing (FCCN/FCT) and funding, but with consultation and participation of the community
  - Centers of expertise (Studies and surveys, Licensing, training, electronic services)
Mission: ensure access to scientific knowledge of recognized prestige and quality

Contents

Electronic services

Communication, dissemination and training

18 content providers
15 M €

> 60 Institutions

> 350 K Users

10,6 M Downloads
RCAAP: 2008
Governance

- **FCT / FCCN**
  General coordination and infrastructures

- **Universidade do Minho**
  Scientific and Technical coordination
RCAAP Services

- Search Portal
- Repository Hosting Services
- OAI-PMH Validator
- Common Repository
- Data Repository
- Usage Statistics
- Journal Hosting Service

Dissemination, Training and Helpdesk

- 2008
- 2008
- 2009
- 2009
- 2010
- 2011
- 2011
Evolution of Repositories in Portugal

Repositórios Institucionais - sem RComum

<table>
<thead>
<tr>
<th>Year</th>
<th>RI (local)</th>
<th>SARIs</th>
<th>Total Harvested</th>
</tr>
</thead>
<tbody>
<tr>
<td>2003</td>
<td>1</td>
<td>5</td>
<td>18</td>
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<td>2004</td>
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<tr>
<td>2016</td>
<td>23</td>
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<td></td>
</tr>
<tr>
<td>2017</td>
<td>23</td>
<td>28</td>
<td></td>
</tr>
</tbody>
</table>
**SARI - Institutional Repository Hosting Service**

<table>
<thead>
<tr>
<th>Main Features</th>
<th>RCAAP Responsibility</th>
<th>Institutions Rights</th>
<th>Institutions Obligations</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Academic &amp; Research Institutions</td>
<td>• Housing (Datacenter)</td>
<td>• 1 TB storage</td>
<td>• Respect contract</td>
</tr>
<tr>
<td>• <strong>SaaS Model</strong></td>
<td>• Infrastructure management</td>
<td>• Mantaining institutions branding</td>
<td>• Minimum amount of content deposited</td>
</tr>
<tr>
<td>• Gratis</td>
<td>• Software management</td>
<td>• Managing repository</td>
<td>• Cooperate with RCAAP project</td>
</tr>
<tr>
<td>• Regulated by Contract</td>
<td>• Training</td>
<td>• Harvesting in the RCAAP Portal</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Helpdesk</td>
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</tbody>
</table>

**Institutions Rights**
- 1 TB storage
- Mantaining institutions branding
- Managing repository
- Harvesting in the RCAAP Portal

**Institutions Obligations**
- Respect contract
- Minimum amount of content deposited
- Cooperate with RCAAP project
Es un repositorio para las instituciones productoras de literatura científica cuya dimensión aún no justifica la creación de un repositorio propio.

Los autores afectos a una institución que no tenga repositorio pueden registrarse y archivar documentos en el Repositorio Comum.
RCAAP Portal

http://www.rcaap.pt
RCAAP Portal

- 1470982 documents from 127 data sources

- Data sources = Institutional repositories (51) + Journals (74) + Data Repository (1) + Brazilianian Portal (1)

- OAI-PMH harvester
Data sources
Evolution of RCAAP Portal (records from Portuguese Data Sources)
RCAAP in a nutshell

Electronic services
- Portal RCAAP
- Repositórios Institucionais (SARI)
- Dados (SARDC)
- Revistas (SARC)
- Repositório Comum

> 100 Institutions

Support services
- 17/74 Journals
- 28/52 IRs
- 55 Comum

Communication, dissemination and training
- >400K docs
- >20M downloads
Success and Recognition

- EC OA Policy
- FCT OA Policy
- Legal deposit of Thesis and Dissertations
- Open science policy
Portugal-Brazil cooperation

2 to 4 October 2018
Critical success factors

- **Global and integrated vision** (infrastructures, services, policy, advocacy, communication, dissemination and training, helpdesk, partnership, cooperation and connection with international initiatives)

- **Governance model**
  - Commitment at several levels (political, management and operational)
  - Based in centers of expertise (coordination and infrastructures, scientific and technical)
  - Open to partnerships (national, European, Lusophonic, etc.)

- **Service model**
  - Shared resources center = efficiency, economies of Scale (Level of service, Rapid deployment)
  - Free institutions to their “core”/local activities
  - Offers “economies of scale” (cost, quality and fast development)
Critical success factors

But most of all

- Community Building
  - Strong involvement and engagement from the participants
Academic Libraries Working Group (GT BES)

The slides on this section are adapted from Pedro Príncipe original slides
GT-BES
Academic Libraries Working Group

3 main priorities – pillars for WGs action and organization of projects:

1) Political and institutional intervention;
2) Knowledge Transfer;
3) Innovation and Development
GT-BES
Academic Libraries Working Group

MEETINGS/EVENTS

3º ENCONTRO DAS bibliotecas de ensino superior
Porto | 2016
2 e 3 de junho

Website: [www.bad.pt/3encontrobes](http://www.bad.pt/3encontrobes)

177 participants
5 workshops, 5 discussion groups, 3 round table sessions,
14 pechas kuchas, 1 keynote, 12 speakers...
STRATEGIC DOCUMENTS
10 Recommendations for Portuguese Academic Libraries

https://doi.org/10.5281/zenodo.835758
RECOMMENDATIONS FOR PORTUGUESE ACADEMIC LIBRARIES - 2016

FOCUSED IN 4 DIMENSIONS OF LIBRARIES ACTION:

1. Support to teaching and learning, specifically promoting information literacy competencies;

2. Support to research activities and scientific publication;

3. Organizational management of partnerships and cooperation project between libraries;

4. Planning and providing services, systems and spaces that facilitate and boost learning and information discovery and management.

RECIPIENTS AND OBJECTIVES:

All librarians and information professionals of Portuguese higher education libraries, as well as the decision makers of higher education institutions.

1) explore areas of intervention that currently require libraries to define an effective and immediate strategy action,

2) foster cooperation among professionals from higher education libraries, and

3) promote the updating of skills and working methods of librarians and information professionals.
Recomendações para as Bibliotecas de Ensino Superior em Portugal

As 10 recomendações focam-se essencialmente em quatro vertentes da ação das bibliotecas: o apoio ao ensino e aprendizagem, especificamente na promoção das competências de literacia de informação; o suporte às atividades de investigação e de publicação científica; a gestão organizacional de parcerias e de projetos de cooperação entre bibliotecas; e a conceção e disponibilização de serviços, sistemas e espaços que facilitem e potenciem a aprendizagem e a descoberta e gestão da informação.

1. Reafirmar a relevância das competências de literacia da informação na comunidade académica
   Afinar a necessidade de uma formação em técnicas de pesquisa e análise de informação adequada à comunidade científica e académica. Instruir os alunos nas técnicas adequadas para a recuperação, avaliação e uso efetivo de informação. Formar os professores e supervisores docentes.

2. Desenvolver competências dos profissionais das bibliotecas para apoio às atividades de ensino e aprendizagem
   Fomentar a sensibilização dos bibliotecários para a recuperação, análise e utilização de informação, bem como para a compreensão e desenvolvimento de novos serviços e métodos de apoio à educação.

3. Apoiar projetos editoriais de publicação académica e científica
   Apoiar projetos de publicação académica e científica por meio do apoio editorial e dos serviços auxiliares.

4. Assegurar repositórios institucionais alinhados com os padrões de interoperabilidade e preservação
   Reorientar os repositórios institucionais para a conformidade com os padrões de interoperabilidade e preservação.

5. Criar serviços de apoio à gestão de dados científicos
   Criar serviços de apoio à gestão de dados científicos que facilitem a recuperação, avaliação e utilização de informação.

6. Potenciar o papel da biblioteca no apoio à investigação
   Potenciar e promover a utilização da informação disponível nas bibliotecas de ensino superior.

7. Fomentar parcerias com estruturas de apoio à comunidade académica
   Fomentar parcerias com outras instituições e organismo para o apoio à investigação e à publicação científica.

8. Promover e facilitar o acesso às fontes de informação
   Promover e facilitar o acesso às fontes de informação disponíveis nas bibliotecas de ensino superior.

9. Reinventar e potenciar os espaços das bibliotecas
   Reinventar e potenciar os espaços da biblioteca de ensino superior.

10. Profundir redes de colaboração entre profissionais e instituições
    Profundir redes de colaboração entre profissionais e instituições.

https://doi.org/10.5281/zenodo.835758
2014: 13 programs in 7 institutions
2015: 17 programs in 10 institutions
2016: 19 programs in 16 institutions
2017: 21 programs in 16 institutions
THE FUTURE

Towards a Network of Portuguese Academic Libraries (2017-)
Towards a Network of Portuguese Academic Libraries

- Initial contacts between GT-BES (National meeting of Higher Education Libraries) and the Secretary of State of Science, Technology and Higher Education (SECTES) [June 2016 and March 2017];

- Call/challenge from SECTES to prepare the creation of a network of Portuguese Academic Libraries [April 2017]

- Establishment of an ad-hoc working group to prepare a proposal [June-October 2017]
Towards a Network of Portuguese Academic Libraries

- **Working Group:**
  - Ana Alves Pereira – (SECTES)
  - Ana Migueis (Universidade de Coimbra)
  - Augusto Ribeiro (Universidade do Porto)
  - Carlos Lopes (ISPA – Instituto Universitário)
  - Clarisse Pais (Instituto Politécnico de Bragança)
  - Dina Rocha (Instituto Politécnico de Santarém)
  - Eloy Rodrigues (Universidade do Minho)
  - Luís Miguel Costa (Universidade do Porto)
  - Madalena Carvalho (Universidade Aberta)
  - Margarida Carvalho (Universidade de Trás-os-Montes e Alto Douro)
  - Margarida Vargues (Universidade do Algarve)
  - Maria da Luz Antunes (Instituto Politécnico de Lisboa)
  - Maria João Amante (ISCTE – Instituto Universitário de Lisboa)
  - Maria João Pinto (Universidade Católica Portuguesa)
  - Pedro Príncipe (Universidade do Minho)
Towards a Network of Portuguese Academic Libraries

- Proposal completed and presented to SECTES, CRUP and CCISP

Proposta para a constituição da Rede de Bibliotecas do Ensino Superior de Portugal
Towards a Network of Portuguese Academic Libraries

The document defines the network:

- **Mission, Objectives, Vision and Values**
  - Promote the cooperation, coordination and joint development of projects between the Academic Libraries.
  - Represent and give voice to Portuguese Academic libraries among political decision makers, public bodies, professional associations (national and international) and other relevant entities.
  - Encourage and support the sharing of resources and services among participating libraries.
  - Elaborate, adopt, disseminate and support the use of guidelines, guidelines and standards in libraries.
  - Promote and support the development and delivery of services for Academic Libraries.
  - Explore and capitalize opportunities for participation in national and international programs and projects that contribute to the development of Academic Libraries and network funding.
  - Encourage and support the training and professional exchange of library staff.
Towards a Network of Portuguese Academic Libraries

The document defines the network:

- **Areas of intervention:**
  - Policies and strategies
  - Cooperation and sharing
  - Infrastructures and systems
Towards a Network of Portuguese Academic Libraries

- The document defines the network:
  - **Priority actions:**
    - Collective/Union Catalog
    - COLABORA – Platform for training resources
    - Statistical indicators
    - Academic Libraries Observatory
Towards a Network of Portuguese Academic Libraries

- The document defines the network:
  - **Organization and Governance**
    - Mesa da Assembleia Geral
    - Assembleia Geral
    - Diretor Executivo
    - Comissão Executiva
    - Secretariado
  - **Costs and Funding**
Towards a Network of Portuguese Academic Libraries

- We look forward for the practical developments and the creation of the network in 2018.

- As stated in the objectives, it will be also a tool for international cooperation with other similar networks and organizations, like GHMULA.
Obrigado
谢谢
Thank you