



PROPOSAL

# ENSURING LIBER'S VIABILITY & BUILDING ON SUCCESS

(UPDATED FOLLOWING FEEDBACK FROM PARTICIPANTS, MAY 2019)

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# INTRODUCTION

## We Listened.

Thank you to everyone who reacted to the first draft of this proposal and shared insights with us. Answers to the most common questions we received are on p. 7. In addition, we made the following adjustments based on your feedback.

### Fees Frozen Until 2023

You told us that you were concerned about future increases to fees. This proposal is a plan to make LIBER sustainable for many years to come. If it is approved, we pledge to keep fees stable until the end of our 2018-2022 Strategy.

From 2023 onwards, any increases will be minimal (e.g., indexing for inflation).

### More Events & Training Capacity

A concern across the board is the popularity of the Annual Conference. You told us that we need to extend capacity. Our list of proposed new services on p. 4 therefore concentrates on this, starting with a mid-term event in 2020. Our earlier suggestion to produce a press review and thematic mailings has been removed based on feedback, leaving more possibility to focus on events.

### Adjusted Categories & Fees

We re-calculated the countries in each category using the most recent GDP data. This moved some countries up to Category B. This would have brought in extra revenue but we have offset any potential gains by moderating the price increases for categories B and C. We also now suggest a lower fee increase for organisations in response to your comments.

LIBER was born in 1971 out of a deeply held belief that research libraries across Europe would be stronger if they worked together.

What began as a small group of library directors has evolved into a dynamic and thriving organisation. It is a broad network, active in 40 countries. From library directors and their staff to open science advocates, data experts, researchers and politicians, we are all LIBER and we all believe in the power of innovation through cooperation.

This shared purpose has never been more vital. New movements, technologies and players - Open Science, digital scholarship, artificial intelligence, the EOSC - are rapidly changing the way research libraries, and their users, operate. Libraries must frequently update their services and train staff to deliver them.

LIBER is moving quickly to address these challenges. More than ever, we are producing informative resources, offering professional development opportunities and representing European research libraries in Brussels.

Standing still is not an option. Our research libraries have growing aspirations and we want to support them with more tools, training and services. Crucially, we want to do this in a way which ensures that LIBER remains strong and stable. This last point is essential. LIBER has a healthy reserve (equivalent to approximately one year of expenses)

but our basic running costs are no longer covered by the contribution fees of our institutions.

Ensuring our viability and meeting our network's growing needs has been the topic of intense discussions. We have carefully considered LIBER's strategic goals, current activities and finances. We have also actively sought the opinions of our libraries, and we thank you for your insights. We know you want more training, and more opportunities to be involved in LIBER. We know that we need to make the benefits of participating in LIBER clearer, and that we must continue speaking up on the European and global stage for the interests of research libraries.

Libraries have told us what they would like LIBER to provide, and this is our plan for achieving those aims. It includes a suggested rise in annual fees from 2020 (the first increase in 5 years) and an explanation of how we will use those resources.

On behalf of the Executive Board, I hope that you will join us in supporting this vision of a LIBER capable of delivering growing value for its libraries.



**Jeannette Frey**

*President of LIBER & Director of  
Bibliothèque Cantonale  
et Universitaire (BCU) Lausanne*

## WHAT WE CURRENTLY OFFER

‘The most useful thing about LIBER is the knowledge exchange it enables across Europe through the working groups or the conference.’

Quote from LIBER Participant

LIBER is Europe’s largest network of research libraries.  
Our mission is to enable world-class research.

We do this by representing the interests of our institutions, their universities and their researchers, and by working towards the goals in our 2018-2022 Strategy<sup>1</sup>.

Your annual fee ensures that we can carry out a range of networking, professional development, advocacy and training activities. Benefits include:

- **PARTICIPATION IN OUR WORKING GROUPS**, a way to broaden your network and share knowledge on strategically important topics;
- **REASONABLY PRICED TRAINING OPPORTUNITIES** such as our leadership programmes for emerging and current directors;
- **HALF-PRICE REGISTRATION** for our Annual Conference;
- **NETWORKING** with like-minded professionals;
- **VOTING RIGHTS** at our Meeting of Participants, including eligibility to be nominated for and serve on the Executive Board.

In addition, LIBER produces reports, case studies and webinars on topics of importance for research libraries, and plays a critical role in lobbying for research libraries in Europe and globally. Our work in this area resulted in the approval of a Europe-wide text and data mining exception for research in 2019.

Finally, by participating in European projects, LIBER has ensured that its libraries are up to date with the latest innovations and that the perspectives of research libraries are accounted for in the research agenda.

# WHICH NEW SERVICES WE PROPOSE

**‘Through LIBER, the library view is represented at relevant political developments. This is something we cannot do as a single university library.’**

*Quote from LIBER Participant*

**We will provide our libraries with valuable services, and will ensure that all Participants can benefit from the services which we offer.**

The services we propose reflect suggestions received from library directors and their staff.

## **Mid-Year & Strategic Planning Events**

The Annual Conference has become so popular that it quickly sells out, and some Participants who would like to attend cannot do so. We will add yearly mid-term meetings so that more LIBER libraries have opportunities to come together with colleagues for networking and learning. In addition, from 2021 we will create a strategic planning event which focuses on defining, creating and implementing a strategic plan, with the support of staff and institutional leaders. It will be distinct from the LIBER Journées seminar, which will be held every two years, from 2020 onwards.

## **Library Involvement in European Projects**

We have participated in 21 funded projects with 60 LIBER libraries. This has kept library priorities high on Europe's research agenda. Since we know that many more libraries want to work with us on projects, we will invite libraries to add their skills and project ambitions to a LIBER database. This information will be used to identify and invite LIBER libraries to become official project partners as part of our standard procedure when searching and applying for projects. The database will also help us to spot more opportunities, based on the profiles of our libraries.

## **Detailed Europe-wide Studies**

We will produce in-depth reports which provide more data, insights and intelligence about how the research library landscape is evolving. These reports will take a pan-European view and will cover relevant topics in considerable detail.

## **European Advocacy**

LIBER has earned a reputation for effective advocacy. In recent years, we have won meaningful improvements to copyright law and developed relationships with key decision makers. This work was led by our Copyright Working Group, with essential support from a professional lobbyist. The costs for this expert advice came from our reserves. With stable funding, we can continue expanding our influence in Brussels and respond to European Commission proposals. Upcoming topics of interest include Horizon Europe, and the implementation of Plan S, the European Open Science Cloud, the Public Sector Information (PSI) Directive and the Copyright Directive.

## **Expanded Leadership Programme**

Many LIBER libraries have already benefited from our leadership programmes for current and future directors. We will expand these programmes to include internship and mentoring projects, as well as an alumni network.

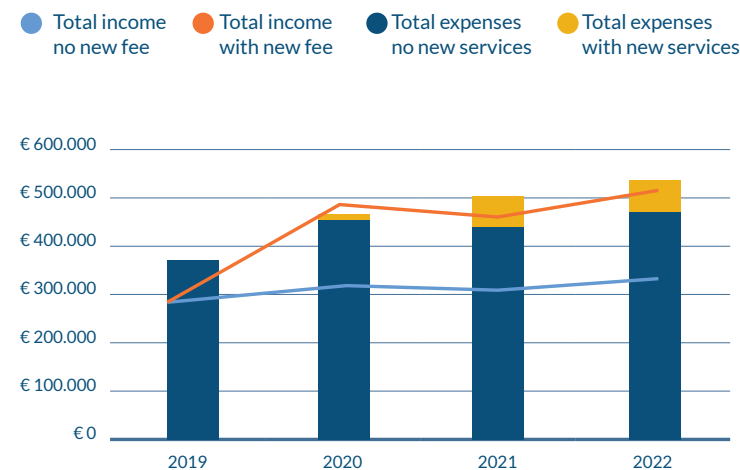
## **Frequent Webinars**

Our webinars have been exceptionally popular. We will run webinars more often so that you can hear from engaging speakers, deepen your understanding across a range of topics and learn about relevant best practices and resources. LIBER libraries will also be able to suggest a webinar as a way of sharing their own successes and insights with the entire community.

## WHY NOW

LIBER has grown tremendously in the past decade. We have moved from a volunteer-led organisation to a professional foundation; from an Annual Conference which comfortably hosted its core community to one which quickly sells out; from a low-profile network to a champion for research libraries in Europe and globally.

### Costs vs Income



*This graph illustrates LIBER's projected income and expenses, both with and without the new proposed fees and services. By "total income" we mean income from Participant fees, sponsorship and events.*

This steady extension of activities and services has created a situation where LIBER's income no longer covers current costs. Our participation in European projects has allowed us to balance the budget but this is not a reliable source of funding and we should not depend on it.

We want to keep innovating for our libraries. From surveys and face-to-face conversations, we know you need more training, learning and networking. If LIBER is to continue thriving, however, we need more than energy and ideas. We must bring LIBER's historically low annual fees in line with our expenditures.

This proposal offers a way to do just that. It makes us independent of unpredictable project funding, ensuring that we can satisfy the needs of our community and meet the goals of our 2018-2022 Strategy. It also enables LIBER to keep a healthy reserve, in order to comply with legislation, and to manage risks and situations beyond standard daily operations. LIBER's reserve was €540,000 at the end of 2018. This is enough to cover risks and operating expenses for approximately one year.

### Have other funding avenues been explored?

Sponsors give LIBER much appreciated support. We are finalising a new strategy which will allow selected corporate partners to make a greater contribution to our network activities. Already this approach has yielded a new gold sponsor. We are targeting a 20-25% yearly increase in sponsor income from 2020-2022.

We are also actively seeking roles in more funded projects. LIBER's role in European projects has been a valuable source of influence. Through projects, we have benefited from opportunities to extend our activities and increased our expertise in key areas. However, project funding cannot cover core expenses. Meanwhile, LIBER needs a solid staff base to engage in projects.

## PROPOSED NEW FEES

‘LIBER is a well connected network for library issues on the European level. It’s important for us to be part of this network.’

Quote from LIBER Participant



Inclusivity is one of LIBER’s core values. The foundation has always aimed to keep annual fees affordable for a majority of Europe’s research libraries.

This proposed new fee structure allows LIBER to provide long-term value for its libraries. If approved, annual fees will be frozen until the end of the 2018-2022 Strategy period. Increases after this date will be minimal.

The three bands in the table are based on national GDP per capita<sup>1</sup>: Category A (above \$30,000), Category B (\$15-30,000) and Category C (below \$15,000). This reflects different financial realities among LIBER institutions.

Assuming the number of LIBER libraries stays stable, this increase would bring annual income from contribution fees to €406.000 (versus €228.000 currently). This is enough to cover 82% of LIBER’s projected expenses in 2020. Remaining costs will be met by income from sponsorship and events.

Membership Type	Category A <small>Austria, Belgium, Denmark, Finland, France, Germany, Iceland, Ireland, Italy, Luxembourg, Malta, Netherlands, Norway, Spain, Sweden, Switzerland, United Kingdom</small>	Category B <small>Cyprus, Czech Republic, Estonia, Greece, Hungary, Latvia, Lithuania, Poland, Portugal, Slovakia, Slovenia</small>	Category C <small>Albania, Armenia, Bosnia and Herzegovina, Bulgaria, Croatia, North Macedonia, Romania, Serbia, Turkey</small>
<i>Institutional Individual Research Libraries</i>	€995	€545	€260
<i>Organisational Library Organisations/ Consortia; population above/below 25m</i>	€2.595 / €1.295	€1.195 / €1.095	€260 / €260
<i>Associate Companies or consortia supplying services to research libraries</i>	€1.220	€725	€645
<i>Individual Librarians who work or have worked in research libraries*</i>	€225	€210	€185

\*We intend to phase out this category from 2021.

<sup>1</sup>[https://www.imf.org/external/datamapper/NGDPDPC@WEO/OEMDC/ADVEC/WEO\\_WORLD](https://www.imf.org/external/datamapper/NGDPDPC@WEO/OEMDC/ADVEC/WEO_WORLD)



# FREQUENTLY ASKED QUESTIONS

## **Who decides if these fees are approved?**

Institutional and organisational Participants can vote on this proposal at LIBER's next Meeting of Participants, to be held on 27 June at the 2019 Annual Conference in Dublin, Ireland. Voting by proxy is possible if you cannot attend the meeting in person. If approved by LIBER's Participants, the new fees will take effect in 2020.

## **Has LIBER looked at cutting current costs?**

We work to a tight budget with a small number of staff. We depend on (and appreciate enormously) the many enthusiastic and dedicated volunteers who work with us on key issues and initiatives on behalf of the entire network. To bring costs in line with current income, we would need to reduce our limited expenses by approximately a third. This would have a drastic impact on the services LIBER could offer to Participants.

## **We thought LIBER was financially healthy. What happened?**

Many of our activities in recent years have been made possible by two factors. First, we have drawn on our reserve for exceptional expenses. An example of this is the professional lobbyist who supported our successful and much valued work on copyright reform. Second, we have benefited from overhead received for our work in European projects. These income sources are neither reliable nor sustainable. This proposal represents a detailed look at LIBER's overall long-term finances and, specifically, what is needed to achieve the activities in our 2018-2022 Strategy in a sustainable way.

## **Will LIBER continue to benefit from project participation?**

Projects have always been important to LIBER. This has not changed. However, unlike in previous years (when we participated in multiple projects at once) we currently only have one project running. This means a sharp drop in project overhead and in the number of hours which LIBER staff can write on project work.

We have already applied for roles in several new initiatives and are identifying new opportunities. When we win roles in new projects, we will need the resulting overhead to meet the extra running costs associated with these projects. We should not expect project funding to cover core expenses.

## **Has LIBER considered finding more sponsors or libraries which want to join?**

We aim to increase sponsorship income by 25% in 2020 and are preparing a new strategy to achieve this. We will always welcome new LIBER libraries but actively seeking them out requires the Office to first have the resources to run such a campaign.

## **Did LIBER consider fees based on library size and income, rather than a broad measure such as GDP?**

Yes, but this was ruled out on the basis of complexity. Any criteria related to size (e.g., institutional turnover, library budget, library FTE, student FTE) would be liable to challenge and hard to apply evenly given cultural, funding and higher educational system differences across Europe. Even if a set of criteria could be applied fairly to 450 libraries in 40 countries, staffing costs would need to rise in order to obtain, maintain and verify this information.

## **What if this proposal is rejected?**

If the proposal is rejected, LIBER cannot carry on as it currently does without facing significant financial difficulties. Services will therefore face immediate cuts. The Board will meet to decide on the specific measures to be taken. A new proposal for LIBER's future work will be put to Participants in 2020.