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## Trends from the Industry Perspective

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## Trends from the Industry Perspective

FOR THE ANNUAL Database Marketplace Survey (see *LJ* 5/15/02, p. 42ff.) company representatives were asked what major issues or trends will impact database availability and distribution in the next year. While budget woes are clearly the major issue for libraries and vendors alike, other trends are also expected to shape online information services.

### The economy and the library

A soft economy, with decreasing library budgets, is the most significant concern for 2002. Beth Dempsey, corporate communications manager, Gale Group, is just one of many who anticipate difficult decisions as librarians "look for the best value for their budget dollars." Facts On File's Ben Jacobs, director of online sales, agrees that with libraries increasingly pressed to serve a variety of purposes, libraries will need to get the most for their money when negotiating online purchases.

This search for the most value may also direct product development. Eric Shively, public relations group leader, Chemical Abstracts Service, said that as librarians look for more value, they "expect to see database searching integrated with access to the full-text documents." Even traditional bibliographic services such as Chemical Abstracts Service feel the pressure to link to as much full text as possible and are actively pursuing licensing agreements with primary publishers and linking standards.

Traditional indexing products will not be going away anytime soon. Terry Owen, vice president, marketing, CSA, said, "We will see a trend toward more powerful indexing tools and systems that help libraries integrate various aspects of information dissemination."



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Tightening budgets also means that librarians need more information to make wise purchasing and continuation decisions. To determine what to purchase and what to cut, librarians will have to measure database usage and determine user preferences and behavior, according to Jennifer Hartzell, manager of corporate communications for RLG. Good, consistent database usage data from companies are more important than ever, but Hartzell said that capturing usage across vendors' systems for all resources must be built into the library's interface.

Demands for better products and better usage data, all at a reasonable cost, may have a ripple effect on companies that must pay the development costs. In the long run, higher development costs coupled with fewer sales may favor larger firms.

### Expanded linking

The demand for increased online full text brings linking into the spotlight. For many secondary and primary online systems, increasing the number and types of links is a high priority. Libraries want to reduce the burden on interlibrary loan and document delivery by linking from bibliographic records to full-text articles. For vendors, linking means that revenues stay at least partially within the online service that provides the full text. In addition to providing additional search options for researchers, linking also brings shared revenues to the company that provides the links.

Linking requires increased cooperation among information companies. Users want their bibliographic database searches to link to full text, no matter who the publisher is. They also want to move to other relevant databases without constantly changing systems or interfaces. Gale Group's Dempsey said that "publishers cannot continue to produce disparate, independent databases. New technologies and publishing models that produce integrated, interconnected information services will find a welcome audience."

Technically, linking is becoming easier, with accepted initiatives such as

CrossRef and open standards. Debbie Durr, sales manager at NISC, reported that new technologies—for cross-referencing and cross-linking content across multiple vendor platforms—are creating comprehensive access to knowledge-based information. XML and SGML, Durr said, will become more popular for both publishers and users. A D & B spokesperson hoped that the adoption of the XML standard would support a more mobile customer base.

### Back file building

Increased linking and more full text have other implications. An artificial cutoff date for online materials has caused a decline in the use of older materials, but when back files are put online, usage of older materials goes up. Back file building is as much a challenge this year as bringing additional current full text online.

The two main areas of impact revolve around content and linking, said Scott Bernier, communications manager, EBSCO Publishing. "There is a continued emphasis on the increase in quality full text available in databases, reflected in both quantity of sources and depth of back file," Bernier said.

But the demands of the market can sometimes be at odds with the trends in the publishing industry. The effects of the Supreme Court's ruling in *Tasini v. New York Times*—that freelance writers, not publishers, retain electronic rights to articles in electronic databases—continue to be felt. The ruling has caused online vendors to pull materials offline and has made some primary publishers particularly nervous about online derivative products.

Deborah Loeding, vice president, sales and marketing for the H.W. Wilson, believes the major issue this year will be "the continuing difficulty to secure rights to full text to journals to be integrated as part of a database." More journal publishers, Loeding said, are concerned about the drop-off in print subscription revenue and the impact of the *Tasini* ruling. "As a result, fewer rights to aggregators are being granted," said Loeding.



## ONLINE DATABASES

### Standards & integration

H.W. Wilson has already seen a positive effect on resource integration from Ex Libris's SFX link server technology and the Open URL standard. RLG's Hartzell said that "emerging standards for information encoding, linking, and integration will change what is possible, what libraries demand, and what suppliers can make available." RLG is heavily involved in standards work both as part of its collaborative mission and as a pathway to new and more powerful information resources.

Shared technical standards will allow better integration of internal and external information. Many information companies are creating products or services that will develop these integrated and customized information systems. Kimberly Reisig, corporate communications specialist for West Group, envisioned "content integration across companies and interdepartmental knowledge sharing." Westlaw Integration Solutions, Reisig said, allows firms and law librarians to integrate Westlaw content, editorial enhancements, and technology right

into their intranet or enterprise portal. Factiva and LexisNexis are also committed to integrated product develop-

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**T**he common themes: more value for library dollars, cooperation on linking, and integrated delivery of full-text

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ment for their corporate customers. Chemical Abstracts Service noted that customers now expect external information products be compatible with their intranets.

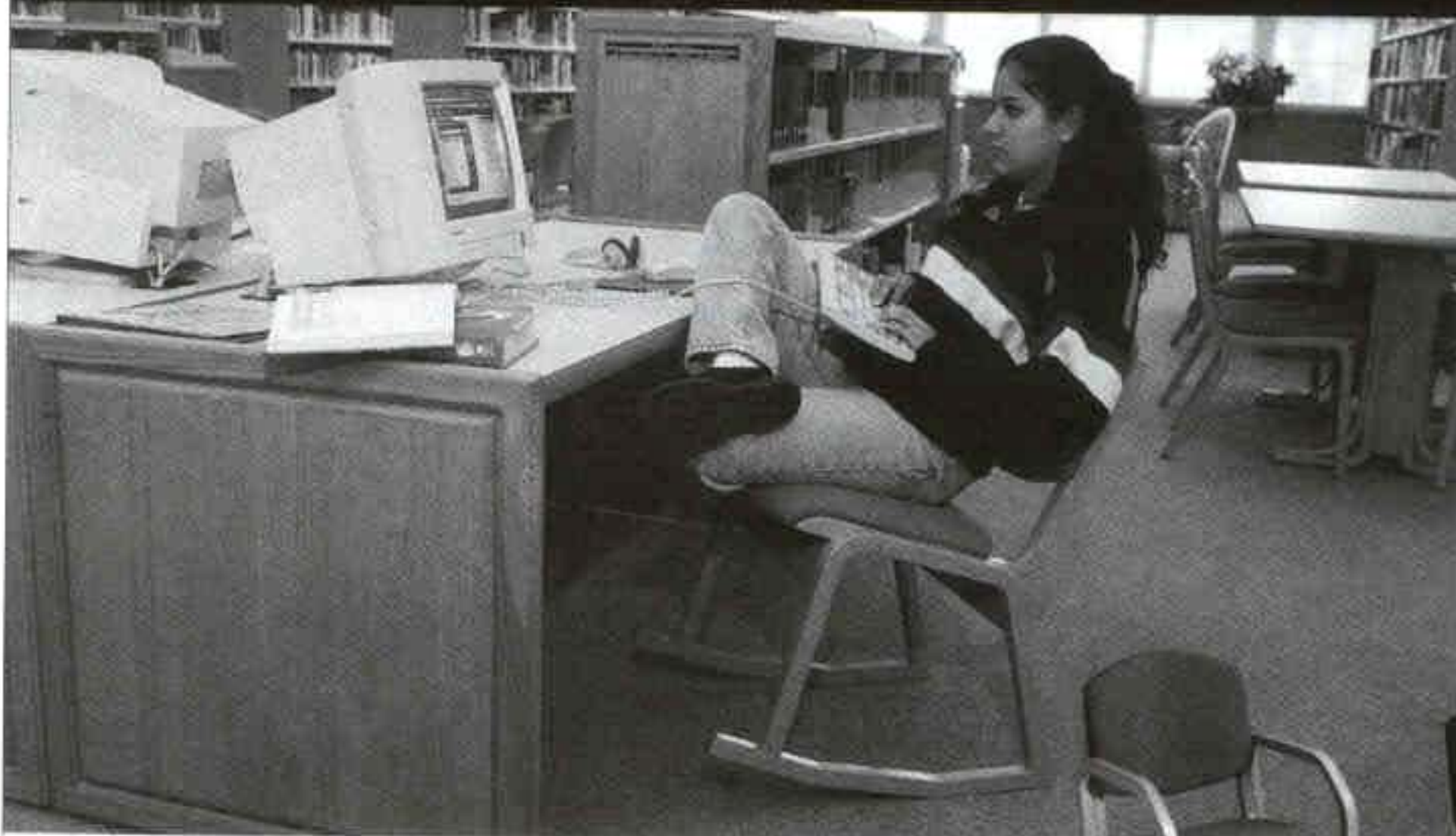
### Single access points

Information products that integrate internal and external information are

being developed or offered by many companies. "The integration of external and internal content using a single access point will be the key requirement of information professionals," said ISI's Rodney Yancey, manager of corporate communications, in summarizing this trend. "Product-centric solutions will no longer be acceptable. Vendor cooperation or 'coopetition,' such as linking, will benefit by driving usage that defines value to customers. This trend will affect how vendors develop customized services, searching tools, and taxonomies." Amanda Procter, corporate communications manager, Ingenta plc, said that this year, companies will focus on products that integrate easily and seamlessly within library OPACs.

Whether you are working in a corporation with an intranet, or in a public or academic library where the library's catalog is the centerpiece, an integrated system that allows users to search a variety of resources through a single interface may be your goal this year. While an ideal for many years, emerging standards, technologies, and products are finally making it possible.

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## ONLINE DATABASES

### Consortia

Libraries of all types continue to rely on consortia to get the best deals for online content, something company representatives believe will continue. RLG's Hartzell said this year will bring "complex subscription requirements for new kinds of consortial purchasing." One example of this complexity may be customer demands for direct patron interactions, enabling document delivery to patrons via e-mail or web-posting.

Ingenta's Procter states that "site licensing and consortia deals will impact on database availability and distribution to libraries this year, as consortia develop their negotiations with a broader number of publishers." While some may speculate that the days of consortia are coming to an end, consortia are expected to be even more powerful in helping libraries negotiate complex licenses for online content.

### Better tech, permanent access

Multimedia products will begin to grow in importance. Linda Manis, public relations coordinator, SIRS Publishing, looks forward to "much easier avail-

ability to photographs and graphics."

Facts On File's Jacobs points out that improved telecommunications infrastructures and faster connection speeds will play a role in multimedia development by broadening "the types of information which can be fitted into a database." Jacobs believes that new ventures to allow searching through one interface, across different vendor's databases will allow libraries to aggregate the content of their databases and patrons to search across all of their holdings. Owen of CSA said that libraries "are installing more powerful, more efficient infrastructures, and information providers are responding with more efficient, more integrated information products."

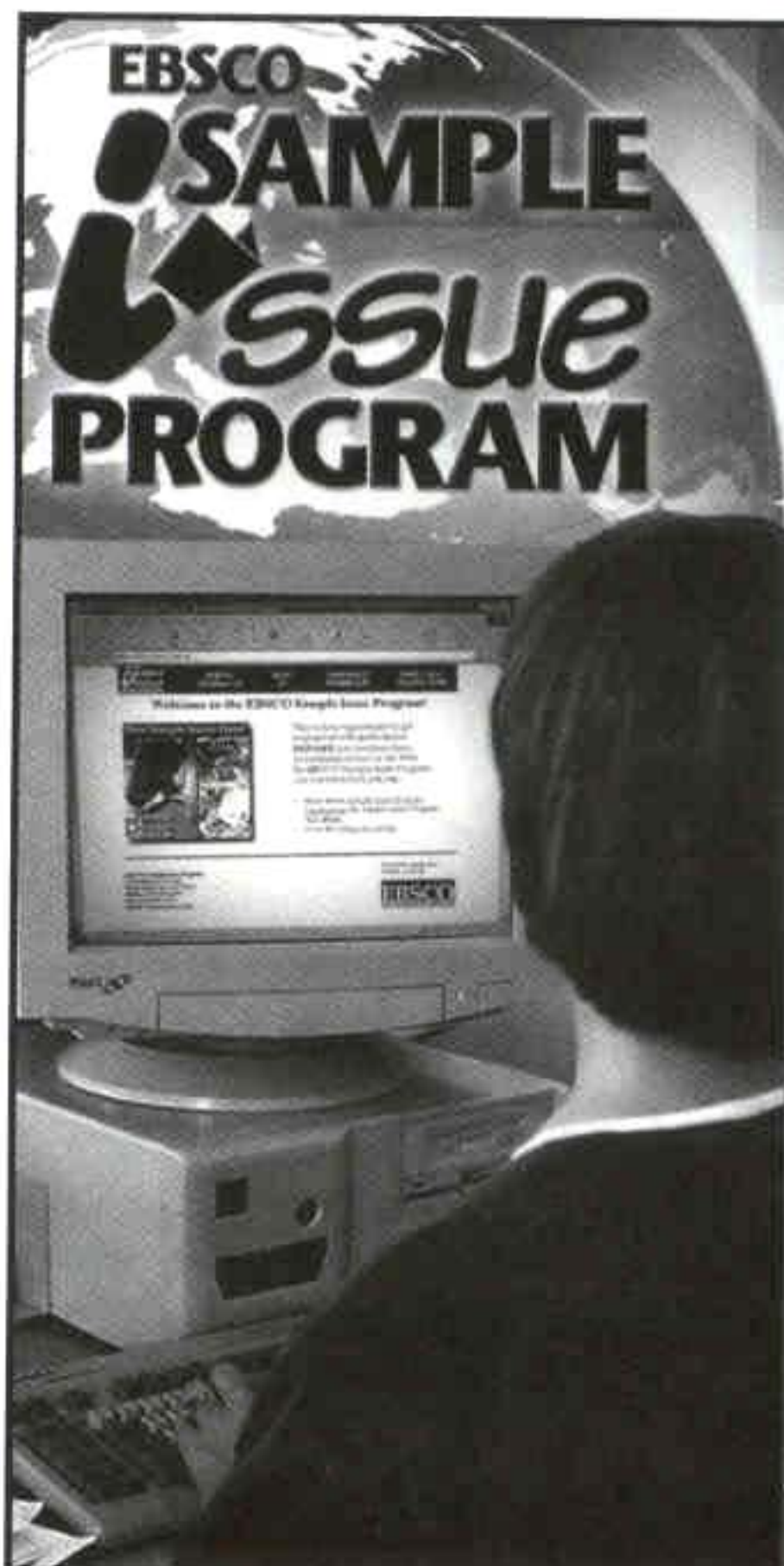
Some trends, while mentioned by only one or two information companies, still seem important. Miles Refo, assistant marketing manager, Nature Publishing Group, singled out "permanent access" or data ownership vs. leasing as the most important issue facing librarians and information providers this year. Wilson's Loeding agreed, citing a "concern for archiving and the inability to ac-

cess full-text articles" when a library has to cancel a subscription. CD-ROM, or other in-house media, can be used as a backup for now, but libraries are a long way from a solution to this issue.

### Addressing the web

The major need for 2002 is to address the structure and content of the Internet, according to SIRS's Manis. "Collection building, such as librarians do for their individual institutions," is needed to make the Internet a viable library resource. In the same vein, NISC's Durr said that "students need to learn that there is much more valuable content beyond Yahoo- and Google-type searches. End users need to be better educated to alternative reference sources apart from those to which they are accustomed." This is a concern shared by librarians and information product providers alike.

Budgets, integrated products, linking, and better information sources and services are the most common threads that these information company representatives highlighted. Are these the major issues that are also on librarians' minds this year? Let me know.



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