

## AGGREGATION OR AGGRAVATION

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When Becky Lenzini asked me to speculate about the long-term future for aggregators in the library marketplace I started to worry. Forecasting far into the future (in this case, five years) makes me nervous; like most people if I were any good at it my career in librarianship would be a hobby rather than my sole means of support. Noted economist John Kenneth Galbraith once said that the only function of economic forecasting was to make astrology respectable. This may apply to me, too; I'll let you be the judge.

The explosion in electronic resources during the past five years has been both astounding and exhilarating. Sometimes I need to remind myself that less than sixty months ago I was proudly unveiling our new gopher that accessed our online catalog AND an ASCII version of InfoTrac. Those were heady days. I bet most of today's college freshmen don't even know what a gopher is (or care). Access to these thousands of electronic journals, databases and resources obviously has and is revolutionizing the way in which libraries deliver information.

Concurrent with the opportunities presented by electronic journals and databases are the challenges. Sometimes I can see the stress on the faces of our reference librarians as we add yet another product to our menus. Managing these resources and presenting them coherently to our users are two issues that face all of us who work in or with libraries. From the perspective of collection development librarians managing (that is, evaluating, negotiating contracts for, and paying for) electronic resources is becoming increasingly more complex and time-consuming. A case in point is the way we handle e-journal subscriptions. Where once we used one jobber to purchase the vast majority of our electronic periodicals subscriptions we (in my case more accurately Katina Strauch) now must negotiate with an ever-increasing number of electronic journal providers. Some we purchase by ourselves, some with a local consortium, some with a statewide consortium, and some with a regional consortium. As if that weren't bad enough many of these must be renegotiated annually. And they seem to be growing exponentially so, if it's bad now will it only be worse in the future? "Things fall apart, the center cannot hold, mere anarchy is loosed upon the world."

And the abundance of resources is making it more confusing for our users, the problem being that people have to know more and more about using individual products. The advantages of web interfaces have been blunted by the sheer numbers of them. And, let's not even talk about printing. What library patrons want is the Holy Grail of one-stop shopping where they search an index and are linked directly to any full text the library subscribes to. No checking to see if the library owns the item, then

marching to the periodicals collection or going to another web site to try to find what you want, then photocopying or printing it. The good news is the Holy Grail has been sighted.

### *Enter the Aggregators*

What is an aggregator? I'd call them consolidators and packagers. For electronic journals it's a service that collects titles from different publishers under a single interface. Aggregators provide some or all of the following services: accessing, archiving, subscribing and searching. Some aggregators are collecting and mounting electronic publications providing access through a large, general index, Gale Group's InfoTrac, WilsonWeb, EbscoHost, for example; some are providing on-demand access such as CARL; some are linking to publishers' sites where journals are archived—OCLC's ECO, and others are a collection of electronic journals with an index just to their content (such as JSTOR and Project Muse). At this point no one really does it all but some services provide aspects of the four I just mentioned.

### *Strengths of Aggregators*

**Access:** The aforementioned one-stop shopping, one place to look; what we really want are products that link to both the local print and electronic publications (and, if the index entry leads to neither, a form to send an interlibrary loan request).

**Archiving:** Some aggregators also deal with the archiving issue, guaranteeing a library's rights to the data they subscribe to either by perpetual access or a copy of the data itself if they happen to go out of business. At this point in the evolution of electronic journals, that provides a good deal of comfort and cover to those who must decide whether or not to cancel print subscriptions to duplicated journals or to keep the bound journals which duplicate the electronic ones.

**Subscribing:** Some aggregators provide a service to handle all your electronic subscriptions and relieve you of some of the labor-intensive chores of maintaining a large e-journal collection with numerous vendors; ideally they would handle both print and electronic subscriptions combining invoicing and renewals.

**Searching:** One search engine to simplify searching for library users; if using multiple search engines gets too complicated, these resources will be underused.

**End-Users:** Aggregators facilitate getting information directly and rapidly to the users. After all, isn't that what we are all about?

**Reports:** Many aggregators provide reports detailing how the library is using the service. Reports by title, type of user, discipline, etc. These can be very useful for budgeting purposes to make sure you're getting the most for your money and that the services are being used. Getting accurate serials use data has always been a challenge.

## *Weaknesses*

**Cost:** These services do not come cheap. In some cases they are still priced for large, rich libraries, often based on user population only. New and creative pricing schemes are needed to allow medium and smaller libraries access to these services

**Customization:** In many cases you have to accept the package as is; you may have to buy more than you need. Of course, it's more convenient for aggregators to market their product as a package. Buy all my journals whether you need them all or not or buy none. Buy both the print and electronic version or be penalized. I am waiting for the Great Unbundling. For a library like the College of Charleston, in a fiscal climate in which we struggle to buy what we must, we have no money to buy what we don't need. Right now we are paying for access to four duplicate electronic journals between JSTOR and Project Muse. We don't want to buy packages that are convenient for publishers and inconvenient for us. We want flexibility in the way products are offered. We want transactional pricing, we want subscription pricing, we want to pick how many simultaneous users we need, and we need pricing schemes that accommodate institutions of all sizes. We want it available in different formats and accessible from multiple platforms. None of this is impossible. And those who are able to creatively package and price their products will be rewarded with our business.

**Incomplete:** We still must use several services as no aggregator includes all electronic journal publishers. Things aren't quite aggregated enough. For example, OCLC's ECO and Ebsco don't include JSTOR. When I asked JSTOR about this they said they do plan to make it possible to link directly to articles in JSTOR from bibliographic databases. Information Access Corporation has plans to launch InfoTrac Total Access. Linking collections to indexing will be an absolute necessity.

## *The Future: Three Scenarios for Aggregators*

### Scenario #1: The Continued Growth of the Megasite

Companies such as OCLC, Ebsco, CARL etc. continue to dominate the market. The big get bigger and the industry consolidates. But the market can't support too many big aggregators.

### Scenario #2: Strategic Alliances

Maybe alliances will develop that bring together products in subject areas such as the social sciences, marine biology, etc. Consumers would greatly benefit if, for example, their science databases had links to each others content using DOI's (digital object identifiers).

### Scenario #3: Do It Yourself

Libraries won't be satisfied with the lack of comprehensiveness or available options

and will try to do it themselves. The most interesting recent initiative comes from California State University. They have sent out an RFP asking for vendors to bid on providing a customized web-based full-text database of core collection titles. They intend to use Z39.50 technology to access these journals via system-wide access agreements with vendors, including publishers and aggregators. They want seamless access to a database of electronic journals tailored to the specific needs of the institution. Z39.50 technology does offer some interesting possibilities. The web-based public access catalog software I'm testing now (ready for the public in summer 1999) can simultaneously search multiple Z39.50 databases (including our catalog, IAC, OCLC FirstSearch, etc.) and present the user with one merged hitlist. So, there is no reason why journals and monographs need to be searched separately.

Which of these scenarios will come to pass? I would guess big aggregator and customized homegrown aggregation would be important in the near future. For small and medium institutions if the price is right the big aggregator model will work. For larger institutions or groups of institutions the do-it-yourself model may well succeed. The large 800 lb. Gorilla lurking in the shadows is whether or not journals will continue in their current form.