

Global Study of Information Professionals: Emerging Issues and Trends

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Global Information Study of Information Professionals

Emerging Issues and Trends

Introduction

During the last half of 1999, telephone interviews with 29 information professionals in 17 countries were conducted by two independent information consultants (see author biographies on last page). The objective of these interviews was to identify significant emerging issues and trends relevant to the global information professional marketplace.

The interviewees represented large and small companies, national as well as global. Three professors at academic institutions were also interviewed. The interviewees were found either by using the authors' professional networks or by referrals through professional associations. The interviewees represented a broad cross-section of the profession, some who focus on managing book collections or document delivery, to others who outsource basic research or perform high-level analysis and consulting for both internal and external clients.

In addition, Web sites and directories of organizations were used to identify individuals, associations and programs of study relevant to this study. A partial list of sources includes:

- International Federation of Library Associations and Institutions (www.ifla.org)
- The European Association for Library and Information Education and Research (www.elit.sk/euclid/index.htm)
- The University of Sheffield's Department of Information Studies' World List of Departments and Schools of Information Studies (www.shef.ac.uk/%7Eeis/publications/worldlist/wlist1.html)
- The Royal School of Library and Information Science, Denmark (www.db.dk:80/dbi/internet/schools.htm)

Initial Impressions

Information Products & Services

- Companies who understand and work within the framework of local cultures (both within countries and organizations) have a greater chance of success than those who implement universal business development plans. Awareness of culture

and knowledge of local business practices are critical success factors. In some countries (e.g., Brazil, Mexico, Spain and France) local language programs are critical.

Information Processes

- Some global firms have established *de facto* call centers to handle reference questions, leaving the more difficult, value-add research to information professionals who are industry specialists.
- In the case of one firm, a call center has been established in India, staffed by highly educated professionals, at significantly lower cost than in the primary business centers of Europe or the U.S.
- There is no consensus on the degree of information literacy among end-users — some individuals believe the Internet has contributed to increased business for information professionals — others view end-user searching as a failed experiment or a threat to librarians.
- There is consensus that younger staff are more technology and Internet savvy, but they are not necessarily information literate.
- Knowledge management is a phenomenon around the world, a curiosity to some ("traditional" librarians/information professionals) and a real business practice to others ("progressive" information professionals). However, there is broad diversity of opinion as to what knowledge management is, whether it can be measured and whether or not it has been successful in the field.
- Marketing library services (particularly to internal strategic business partners) is often neglected, though a number of interviewees have devised innovative strategies to market services, such as establishing service level agreements or enlisting users in devising new service offerings.
- Dealing with costs for external information resources is a huge challenge for information professionals — negotiating for budget resources, allocating costs, administering charge-back plans and showing cost/benefits are among a few of the challenges.
- Making the most efficient use of technology to provide the appropriate degree of information resources and information tools to end-users is an ongoing challenge and, in some cases, overwhelming for some information professionals.

The Information Profession

- Even among information intensive companies, librarians and information professionals do not typically have high visibility or influential positions. Service levels have contracted in some consulting firms, even those once thought to have been in the vanguard of using librarians and information professionals for “knowledge” work. In general, virtually all of our interviewees are being asked to do more with less.
- The “support function” or back office alignment of many libraries/information departments fuels negative perceptions of value of the information professional.
- TFPL training courses and its sponsorship of the European Business Information Conference identify this firm as a “brand” among many information professionals in Europe and Australia. TFPL is a library consulting and placement firm based in London.
- *Information World Review* is widely read by information professionals for news.

Information and Library Education

- The general perception is that educational institutions are not training information professionals who are well-versed in the business environment, who understand vendor relationships or who are fluent with technology.
- Not surprisingly, there appears to be a widening skill gap between “traditional” library and information professionals and those who might be labeled “progressive,” some of whom come from outside the profession or who may be subject experts first and information managers second.
- Professional development activities have taken a back seat to heavy workloads and long hours for many information professionals. Several of our interviewees suggested that they would welcome programs to help them cope with, prepare for, and implement changes in their operations. One caveat is that any attempt to develop such a program by a vendor would need the imprimatur of partnership with the information profession rather than a transparent attempt to sell services.
- Many countries provide one, two and three-year post secondary and/or four-year undergraduate programs educating librarians, documentalists, archivists and information specialists, as well as graduate level training.

The Future of the Information Professional

The number of participants in the study was by no means statistically representative of the information professional community in the study countries. However, the insights and frank observations about the profession shared by interviewees provide a framework that allow inferences to be made about the state of the profession globally.

The future appears to be characterized by continuing dynamic changes in terms of content resources, technology, and information service/management models. Further study is needed to validate these observations as actual trends, but the credentials of individuals and organizations represented in this study indicate that companies doing business with information professionals must be aware of and pay attention to the following:

- Successful information professionals are moving closer to information consumers in two ways. First, as information professionals are integrated into business units or teams, adding value means being credible. In order to be credible, information professionals must possess or add specialized subject knowledge to their information management skills. Second, in some cases, information professionals are themselves the information consumers, responsible for analysis and presentation of information to their colleagues. In both cases, it is critical that information professionals understand their roles and the decision-making processes within their organizations. Failure to “step up to the plate” in such a dynamic business environment means being relegated to a back office function that will likely disappear.
- Information professionals who embrace knowledge management and the development of corporate intranets are forced into intensive interaction with other parts of their organizations. Most see this involvement as an opportunity to leverage their skills in organizing information and selecting content appropriate to user information needs. Evaluating and selecting content for deployment to the desktop (and in some cases abstracting and indexing that content)—whether for business professionals in corporations or students/professors in academic communities—are key tasks and areas of growth for the profession.
- Concomitant with the deployment of information resources are the dual challenges of negotiating licenses and managing copyright compliance—issues of major concern to information professionals.

- Information professionals are anxious to demonstrate the value of their contribution and to have models, case studies, and tools that increase their effectiveness in negotiating with senior management for budgets, staff and technology resources.
- Managing internal and external documents in document warehouses with consistent indexing schemes and uniform interfaces for optimum retrieval is another growth area for information professionals.
- In many of our study countries, critical local content resources may need to be included in information product offerings.
- Increasingly, some companies are using vendors to combine internal proprietary content with external content to produce customized information products.
- Eventual outsourcing or elimination of back office functions, like corporate libraries, is likely to continue though shared services models which offer opportunities for corporate libraries to evolve and keep pace with their rapidly changing organizations.

Country Highlights

Australia

Australian library and information science education offers a range of undergraduate and graduate degree programs. Most librarians are employed in the academic sector. The primary association is the Australian Information and Library Association.

Some libraries have fared much better than others in recent years. A major Australian organization has downsized the corporate librarians, while in the financial sector at least one library has become integral to management. The library manager there reports to the Head of Knowledge Services for the company.

Belgium

Each of the two Belgian information professionals interviewed had strong value propositions to offer their organizations—high-level analysis of information from an economist's point of view and retrieval of complex chemical information from patent databases for R&D efforts. Both emphasized the challenge of hiring professionals with adequate subject expertise to relate information to the context of business decisions. For one organization the "war for talent" is so critical that they are outsourcing basic information requests to a

labor pool in India. Another organization is hiring some specialists willing to add skills in information management in order to meet requirements for subject expertise in their info center—although there is still a preference for hiring persons with the equivalent of a MLS degree.

A BIP Benelux Survey, conducted in June, 1999, surveyed 26 Belgian companies. It is important to note that a majority of respondents from Marketing, Finance, Sales, Strategy/Planning and Public Relations departments claim to make buying decisions for information services for their own departments — suggesting multiple buying points for online information. While the survey found good use of online information by information centers, it is important for vendors to leverage relationships with information professionals to expand sales of their information products to other departments.

Brazil

Brazil's 20,000 librarians work primarily in academia and school libraries. Corporate libraries are not as well established and function often as archives rather than business information centers. Correspondingly, librarians in the corporate sector generally have a role that is less prominent than elsewhere. One finds subject specialists, such as economists or chemists or engineers, performing literature searches and using online databases more often in the corporate sector than librarians. There are some satellite libraries of U.S. or European-based companies, though the total number is thought to be relatively small, less than 100.

Recently, a Sao Paulo chapter of the Society of Competitive Intelligence was formed and the initial two gatherings have been well attended (about 30 people). Library education is generally at the undergraduate level, though the five library schools do offer masters and doctorates. Though English and Spanish are widely spoken, Portuguese is the country's first language. The fact that so many databases require search commands in English and provide documentation solely in English has been problematic. University libraries have been well funded over the years, though they have suffered more recently from the economic downturn in the country. Internet access is reliable.

Denmark

The most striking observation about the Danish information market is that there are only some 60-100 companies using business information. Intranet development activities seem to be a springboard from which librarians are beginning to work more

extensively with other departments in their organizations. Populating corporate intranets with high-quality content may be the key to launching business information resources into more Danish companies, including companies where there are no Information Professionals. Resistance to flat-fee pricing programs for information services by information buyers, at least when a service is first being introduced, merits consideration. Sales should close more readily with pricing programs that encourage companies to determine realistic levels of use and value to the organization before arriving at a fixed fee.

The Royal School of Library and Information Science in Copenhagen is recognized throughout Europe as an excellent library school. It offers undergraduate and graduate degrees in Library and Information Science.

France

There are numerous corporate libraries in France and an established library and information science infrastructure both in library and information science education, as well as active library associations. Public, academic and university libraries are well funded. Library education is typically a one-year diploma, though there are some masters and doctorates offered.

French companies employ librarians both as researchers and records managers. The greatest concentration of corporate libraries is found in Paris.

Germany

Germany has about 15 library education programs, most of which are one-year programs with internships, the equivalent of vocational education in the U.S. However, there are a number of masters and doctoral level programs as well. Librarians in the corporate sector often have no formal library and information science training, but are subject specialists. Of those who have formal training, it is not uncommon to find a corporate librarian who has been trained elsewhere in Europe (Belgium or the U.K.) or even the U.S.

Hong Kong

Hong Kong has five universities, though none offer library and information science education. However, British and Australian universities have offered courses and degree programs, as well as Nanyang University in Singapore. There are corporate libraries in Hong Kong, notably in the banking and technology sector and in

some international consulting firms. The Hong Kong Library Association is active and in August 1999 hosted a meeting featuring SLA Executive Director, David Bender. An Asian chapter of SLA will likely be formed this year or next.

Italy

As is common elsewhere in Europe, librarians in the corporate sector are often subject specialists first and librarians/information managers second. In the corporate sector, libraries and librarians are not looked upon as essential, therefore their roles have been fairly traditional and low-profile, though this is thought to be changing. The internet is widely used throughout Italy in academia and corporations. There are relatively few meetings specifically for corporate librarians, though there is a SCIP chapter in Italy. Milan is the center of business in Italy and more corporate libraries are located there than elsewhere in the country. Library education is generally a one-year program, more of a vocational nature than graduate study.

Israel

Many information professionals in Israel are trained in the U.K. since fluency in English is seen as a requirement for the best positions in information work. Traditional library services, including use of online services for scientific and technical information retrieval, are quite well developed in Israel. Information research using the Web and other electronic resources for applications, such as competitive intelligence and business planning, appears to be less developed. This suggests an opportunity for business information providers to create programs to help information professionals increase their skills in these areas and market such applications to their organizations.

The Israel Society of Special Libraries and Information Centers is quite active in organizing workshops and seminars and has special interest groups for 'solo' librarians, government libraries, and law libraries. It is also actively involved in planning IFLA's annual congress in 2000 in Jerusalem.

Japan

The SLA chapter in Japan (JSLA) is quite active and draws about 100 information professionals to regular meetings in Tokyo; the association also hosts an annual conference (with about 300 professionals attending) and continuing education workshops. JSLA has 3,000 special librarians as members representing about 700 institutions. Although there are some graduate level library

schools, most library education programs are at the undergraduate level and are far from sufficient from the viewpoint of practitioners. There seems to be a real opportunity to partner with JSLA to offer professional development programs like the Info Pro Alliance programs.

The more “progressive” information professionals in Japan actively market their information centers. They are anxious to increase their effectiveness in dealing with senior management to obtain resources and to convince them of the strategic value of information. Japanese information professionals still manage large print collections because a lot of critical information still exists only in print format. It is also important to note that in the Japanese organization structure, there has not traditionally been a central repository of information. Different areas manage their own information. Information is not considered an asset that has high value and that is to be budgeted separately.

Mexico

Online scientific and technical information is used in many Mexican organizations, but there is relatively low use of business information resources. The growing interest in intranets and knowledge management activities should make it easier to sell business/news information for competitive intelligence and business development applications.

Cultural issues must be considered in selling to the Mexican market. There is traditionally a reluctance to provide information to anyone who might need it (“he who has information has power”), and there is a tradition of individualism before team effort. Personal contacts and referrals are key means of obtaining information. Dealing with economic volatility and bureaucratic procedures are a reality in doing business in Mexico. Conducting business in Spanish opens doors more easily, and since business and pleasure are frequently intertwined, a lot of business deals are concluded over meals.

The Netherlands

Corporate libraries are fairly common in large companies in the Netherlands. The country hosts a number of large international firms such as Phillips and Royal Dutch Shell. Library education ranges from a one-year degree at “polytechnics” to two-year masters level degrees. Most librarians in the corporate sector belong to Vojin, an Amsterdam organization for online users and there is an active SCIP chapter. Also, Rotterdam hosts an annual online meeting.

Singapore

Singapore has a Department of Information Science in the School of Applied Sciences at Nanyang Technical University. The department was established in 1993 as a result of the Singapore National Information Plan, part of the government’s IT2000 and Library 2000 reports. The stated objective of the government was to create an information economy with Singapore as an Asian ‘information hub.’ Other university programs in information technology and information systems were also established in 1993 to train people in the requisite IT skills. Since that time, the government has funded numerous library and information related projects, and by all reports, continues to pursue an information-based economy.

South Africa

Part of South Africa is a highly developed international country; part is still a third-world country. Activities of information professionals can thus range from high-level knowledge management consulting to providing literacy programs in public libraries. SABINET, an online information services company, notes that librarians in South Africa are in the process of “preparing to become” information professionals. A deterrent to online information use is that it is very expensive, particularly with the current unfavorable exchange rates.

Internet growth is very strong. South Africa is rated one of the top 20 Internet-using countries, although connectivity is still poor. The Internet has helped create a greater awareness of online information and recognition of the need for categorized, authoritative information. Professional librarians are being urged to take a key role in Knowledge Management initiatives with external information being depicted as a critical part of the total KM solution. Another noteworthy trend is the formation of consortia—especially with universities facing budget cuts—in efforts to leverage their buying power to keep services going—in spite of downsizing and reduced budgets.

Spain

The library profession in Spain is not as cohesive as in some other countries where there are strong professional associations to unify practitioners, partly due to the highly regionalized nature of Spain. Corporate librarians do not have a specific forum for mutual contacts; they seem kind of lost in the library panorama. Information professionals in global organizations are more in touch with other information professionals in their organizations via web/email/conferences than with their colleagues in Spain.

Spain is not a mature market for online business information resources. Spanish professionals are not accustomed to paying very much for information. Vendors find it challenging to identify who uses information within Spanish companies. It is not typical for Information Centers to exist—even in large companies. The trend to reallocate budgets for print resources to electronic resources is continuing and may present opportunities for online vendors. There is still critical business content that is not yet available electronically, and the American focus of many business information resources is a drawback to use. Several helpful studies on the electronic information market in Spain can be found at <http://www.asedie.es/msstudy>.

It is also important for information providers to note that the public sector pays very late. The best terms are 90 days and some are much longer. This is the fault of parent organizations—not libraries, which have no power over payment schedules. Pricing based on U.S. models may not work in Spain. Usage tends to be much lower in Spain and the perceived value can vary greatly (due to language problems, U.S./European focus, etc.). Libraries frequently ask information providers to set a lower introductory price for a Spanish organization since usage would typically be much lower than in an institution of similar size in the U.S. Pricing for subsequent years is then based on actual usage rates.

Sweden

Sweden is so technology-focused that the Web is an integral part of libraries. Libraries have home pages (and usually had them before other parts of organization); the Web is also used for research. Sweden and Finland vie for top position in terms of European Internet/technology capabilities. R&D departments are major users of online services offered by Swedish libraries. Swedish libraries tend not to serve entire organizations. There is still relatively little business information research in Swedish companies. Swedish culture has an impact on state of development of libraries. Swedes are typically shy. A proactive approach to providing info services is counter-cultural. Culture centers around building consensus—which causes delays in decision making.

Switzerland

Library and information science education in Switzerland is at the undergraduate level. Quite a few Swiss librarians are German and are trained at German library schools. There is also a three-year apprenticeship for Information and Documentation Assistants. The program is offered all over the country (libraries, archives, and documentation centers) and is accompanied by attendance at a

professional school for 1.5 days per week. The third form of library education is a one-year course (one day per week) for university graduates. Students also spend up to 1.5 years working in an information and documentation center—most frequently a university library. It is interesting to note that the librarian interviewed from the biotech firm is English; her position was vacant for a long time before she was recruited there from England.

In the Swiss academic world, universities are combining forces to define and buy resources; CD-ROMs are still used extensively by universities because of fixed, predictable costs. In the corporate world, there is a definite trend to transition more and more resources to the Web version of resources previously acquired in print or on CD-ROM. As in some of the other countries studied, online information has been used most heavily in the scientific and technical arenas and there is a growing awareness of the need to expand use of business information resources to support competitive intelligence and knowledge management activities.

United Kingdom

London likely has more corporate libraries than any other major city in Europe. There are over 28,000 librarians in the two major professional associations in the U.K. These two organizations, the Library Association and the Institute for Information Scientists, are voting this month and next on merging. In London, the IIS's affiliate, the City Information Group, hosts numerous meetings for information professionals. In addition, TFPL, a library consulting and placement firm, sponsors training courses and meetings, such as the European Business Information Conference. SLA's European Chapter is based in London and membership is said to be growing.

Library education has a long history in the U.K. and degrees are granted from 16 universities. It is not uncommon, though, to find corporate librarians in the U.K. who have no formal library education. Given these facts, there is nonetheless a shortage of experienced librarians in the corporate sector as demand outstrips supply, particularly in London. Internet skills and information management expertise are highly valued.

Author Biographies

Jan Sykes and an associate, Richard Fletcher, jointly conducted this research.

Jan Sykes

Jan Sykes has over 20 years experience in the information industry. Currently, she is working as an independent consultant. Recent consulting assignments have included administering Information Needs Assessment surveys, evaluating desktop information services, managing large-scale trials of desktop products, negotiating contracts for information services, and assisting clients with strategic planning activities. Prior to becoming an independent consultant, Ms. Sykes was Senior Director of Client Services Consulting for Knight-Ridder Information, Inc., now The Dialog Corp.

Richard Fletcher

Richard N. Fletcher is an independent management consultant and futurist based in Dallas, Texas. Mr. Fletcher has 19 years of experience in research, consulting and information management. Prior to becoming an independent consultant in 1997, Mr. Fletcher directed the research and knowledge management program for Booz-Allen & Hamilton's global Energy and Chemicals practice. He has also been affiliated with Gaffney, Cline & Associates, Data Base Products, I.P. Sharp Associates (now part of Reuters), Petroconsultants and Rice University.

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