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The Data Dealers: Database Marketplace'97

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The data dealers

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Abstract:

A 1997 alphabetical listing of data base providers is presented. The most significant development in the industry is the ongoing effort of vendors to make use of the World Wide Web in distributing their products. However, online and CD-ROM still remain the basic delivery methods.

Full Text:

LJ debuts an annual series that examines new directions and enduring distinctions in the growing database arena

This report analyzes information gathered from 25 companies that responded to a survey distributed early in 1997. These 25 database distribution and production companies collectively reported on 54 separate online, web, or CD-ROM systems. In addition to the factual data, the survey requested comments on each company's accomplishments and future plans, key goals and objectives, and opinions on what issues in database distribution will most affect libraries in the future. This is the first of a planned yearly analysis of the database marketplace.

Does it surprise anyone that the biggest development to hit the database marketplace is the emergence of the World Wide Web? Last year database vendors had their first starry-eyed encounter with the new medium. Now, however, that initial attraction may have worn off somewhat, like all romances. Nevertheless, vendors remain committed to long-term development of their web capabilities. They have already moved into testing their second-generation web products, both to improve and update them.

Database vendors' first-generation web products were limited in terms of search capability and print options. The markets' newer web versions are beginning to adopt more sophisticated programming, by integrating Java, for example. The challenge for database players now is to upgrade their products' features while keeping just a step ahead of rapidly evolving market demand.

Just another platform

The rampant expectations fostered by the emergence of the web need to be put in perspective: while it is revolutionary as a ubiquitous delivery medium, the web is simply another platform by which database companies can bring their products to the end user. Vendors are not eschewing their traditional delivery methods--online and CD-ROM--for their new web-based products. Nor has there been one single instance where a database company has decided to anoint the web its sole platform. Despite its aura, the web is, for the most part, a complement to the variety of platforms most companies already offer. Still the web's potential cannot be overlooked, as evidenced by many companies' projections that it will become their most popular platform at some point.

Upping the ante

Heated competition in the marketplace means that database companies can no longer assume that libraries will purchase their products just because the company name is familiar. New multinational owners of old companies, new database producers, and inexpensive information on the WWW are just some of the phenomena driving the market. In the introduction to its annual directory of databases, Gale Research Inc. reports that the number of database producers has grown by a factor of 15 since 1975, while the number of online distributors ("vendors") is 17 times larger than it was then. The more than 10,000 online and CD-ROM databases have been joined by some 30-50 million web sites in a database marketplace that has become a multibillion-dollar industry.

A variety of formats

Librarians know that no single distribution format will serve all their patrons' information needs. Companies seeking libraries as customers must offer a variety of formats for their databases, including CD-ROM, commercial online, Internet/World Wide Web, diskette, intranets, and locally loaded. Only four of the 25 companies in this survey offer just one choice of format; more than one-half

offer three or more formats.

Since commercial online is the oldest option, some may consider it old-fashioned, but it is still by far the most popular choice among patrons, followed by CD-ROM and the web. The same databases may be available in multiple forms from a distributor, but often only a subset of offerings is available in one or more formats. Chemical Abstracts Service (CAS), for example, has 212 databases online through its STN International service but only two on CD-ROM, eight on magnetic tape for local loading, and 24 on its web service. All of Knight-Ridder's 662 databases are accessible online or via the web through its DIALOG and DataStar services, but it only offers 85 databases on CD-ROM. SilverPlatter's percentages are reversed, with more offerings on CD-ROM than on the web or online.

Selecting a format for a particular database or group of databases is no longer an easy decision. Specialized titles that are used by a small patron community in an academic or public library may be best purchased on CD-ROM. Web versions are better for sources that have broad appeal and are of interest to searchers beyond the library walls (such as the Wilson databases on WebSPIRS or WilsonWeb). In a special library setting, intranet/local area network (LAN) versions are best for sources that users will use frequently and want at their desktop. Commercial online is still the best choice for power searching of many different titles.

Web versions hot

Web versions are getting lots of press right now since they are the newest in a full range of offerings in the information industry. Companies are under pressure to provide web access to at least some of their databases, because, as one respondent observes, "every major library in North America today is moving toward accessing databases through a web browser."

Web versions may be merely an easier way for novice users to access familiar databases or, like Ei Village, to go beyond traditional databases by incorporating subject-related web pages, E-mail, and listservs.

Those companies that already have web products are working on second iterations: OVID is introducing a Java version of its web system, while NewsNet is implementing web credit card payments. Expect every company to have a web version.

Delivering to the desktop

Web versions have one major drawback: the infrastructure of the web itself. Heavy traffic, particularly at midday, may make reliance on real-time access to the web a frustrating experience.

Local versions, either through tape loading to the online catalog or through intranets or other LANs, often solve response time problems. Moving toward "incorporation into an institution's information infrastructure" is the goal of several companies. This endeavor may take the form of loading tapes at regular intervals, or, increasingly, it may mean online delivery of a steady stream of information fed through filtering software that has been programmed with individualized subject profiles for each user in an organization. This "push" rather than "pull" view of information delivery is already the approach of Individual, Inc., and CARL Corporation reports that UnCover's Reveal, an electronic E-mail alert service, is its "highest marginal revenue producer."

Whether service is push or pull, locally loaded or online, companies often look to the library market to help them reach end users. Web versions or databases available through the online catalog may be available to all constituents of a public library, a much broader audience than these services are able to reach directly. Some companies have added consumer divisions that attempt to go directly to end users, but most are trying to reach larger audiences through libraries or librarians.

Often different markets have different products. CAS, for example, targets SciFinder, which has an easy-to-use graphical user interface (GUI), to novice online searchers, while its STN International command language system is targeted to information professionals and other frequent searchers. EBSCO supports different versions for academic, public, and school libraries, corporate users, medical information providers, and consumers at home, each of which offers a different number and mix of resources.

Full-text delivery

Although bibliographic databases are still the most popular in libraries, full-text delivery has been the story of the 1990s. No longer is it enough to just make patrons aware that a source exists; the complete item must be quickly available either through a full-text database, an online link to the text, or rapid interlibrary loan (ILL) or document delivery.

Many of the services reported here now offer links to ILL or document delivery or plan to do so sometime this year. In addition, almost all offer at least some full-text databases. Not all agree on the best form for full text, however. Most of the full texts are plain text (ASCII) files, but Chadwyck-Healey, STN International, EBSCO, Information Access Company (IAC), KnightRidder, LEXIS/NEXIS, and UMI also offer some images or combination ASCII/image files.

From the advertising literature, an uninitiated reader might assume that all "full text" offerings are the same. "Full text" is used to describe ASCII searchable texts, ASCII texts that are not searchable, image files, and combination files, plus HTML encoded text and PDF files that require a special reader such as Adobe's Acrobat. There isn't one best solution, but combination files offer the most flexibility. Plain ASCII, for example, is favored for searching the full text and for quickly loading and downloading, while an image version retains the formatting, graphics, and type fonts of print. UMI's ProQuest Direct and IAC's SearchBank are two of the services that allow users to select the format. Typically, image versions cost more and take longer to transmit.

Pricing policies

Pricing policies have come a long way since the early days of simple online connect time. Roger Summit, founder of DIALOG, tells a story about how he determined that connect time was the way to price electronic information. When DIALOG was due to start up in the early 1970s, the company didn't have a clue about how to charge for this new kind of service. At an American Society for Information Science (ASIS) conference, while chatting with one of the first database producers, Summit thought, "Why not try charging for the amount of time spent online, like you might charge for time sharing? In the days of 110 baud modems and dumb terminals, this made sense."

In the current high-speed, high-capacity telecommunications and computer environment, connect time is no longer logical. Even in the old days, connect time made it difficult to prepare a budget and penalized high-volume use or leisurely browsing. Only a few services still offer connect time pricing, and none offers it as the only option.

Today, vendors provide customers with an abundance of pricing options, with most companies allowing libraries to choose the pricing policy that is best for them. But choice means complexity, and librarians, more than ever, have to become contract negotiators, scenario planners, and economic decision-makers.

The best pricing option may be related to the target audience of a specific system. For systems aimed at end users (e.g., FirstSearch), it makes sense to select a flat fee pricing scheme such as subscription pricing per year or per search. OCLC predicts "libraries...will want more for their money. They will seek predictability in their database costs, such as fixed annual fees." Output pricing (per record), often combined with connect time, makes sense for systems aimed at expert searchers (Questel-Orbit, DataStar, and DIALOG, for example).

A pricing policy that is becoming more common is to charge a subscription fee by the number of potential users within an organization. This makes sense in a special library environment, where the number of potential users and the value of information to them can be calculated. It is more difficult to justify in a public library or large academic library where an information source may be used by only a small percentage of total library users. Paying for a number of simultaneous users may be better for academic or public libraries for all but the most widely used databases.

Cutting the best deal

Charging by potential users and simultaneous users are both examples of site license subscription pricing. Site license subscriptions may be calculated based on simultaneous users, total user population, tasks performed, or library budget. Extra charges or discounts based on such factors as type of library often figure in. Costs of each database on the Research Libraries Group's (RLG) CitaDel service, for example, range in price from \$750 to \$18,000 per year for up to five simultaneous users. The cost goes up for every five additional simultaneous users. For 25 users, for example, the \$750 database would cost approximately \$2400, and the cost of the \$18,000 database would be more than \$38,000. RLG members pay less for some databases than do nonmembers.

On ProQuest Direct, academic, public, and school libraries pay \$8200 for one user at one site for the indexing/abstracting version of ABI/INFORM. Adding ASCII full texts brings the cost up to \$18,100 per year. Corporate users pay an additional \$10,000 per year.

Engineering Information Inc. offers licenses to Ei Village based either on total user population at an academic institution or on concurrent (simultaneous) users. A college with fewer than 500 users pays \$8500 per year for a basic subscription to Ei Village and Ei Compendex Web, while one with 12,000 users pays \$54,500. Up to ten concurrent users is priced at \$28,500 per year; one user at a time costs \$7000 per year.

Until now pricing for the web version of IAC's InfoTrac SearchBank increased with a library's book budget. The assumption was that the larger a library's book budget, the larger the user base. Unlimited use of each SearchBank database ranges upward from a low of about \$2000 per year. IAC has just introduced simultaneous user pricing to go along with its Remote Patron Authentication Service, which allows library patrons access through the web anywhere, anytime.

Per search or per task pricing is offered by both OCLC FirstSearch and CAS SciFinder. FirstSearch charges between 50 [ctns.] and 90 [ctns.] per search, depending on the number of searches to which a library commits. A full-text article represents five searches. SciFinder defines a task as "the searching, analysis, and output for a question you ask." Up to 280 tasks costs \$5000; 3,065 tasks can be purchased for \$50,000.

Libraries can reduce their costs by purchasing any of these products either through consortia or on a companywide basis. Ovid reports an increasing number of library consortia "are negotiating for group access to databases. This affects cost and creates the need for an effective pricing/access model." Individual Inc. sees that "business information services are becoming more of a corporate purchase involving the library, the information technology department, the chief information officer."

Counting databases

Comparing companies by size is like comparing apples, oranges, grapefruits, and bananas. If you need potassium, you buy the banana, no matter how it compares to the others. If you want a Chadwyck-Healey or RLG, no matter their relative size. If you need vitamin C, on the other hand, either the orange or the grapefruit may serve. Size may figure into a decision but more important is the content that suits a library's needs.

The numbers provided in this study relate to the broad range of topics one is likely to find within a single company. Those systems that have many terabytes of information or hundreds of databases are more likely to cover many different subjects. DIALOG, LEXIS/NEXIS, OCLC FirstSearch, for example, all report huge numbers and all include a bit of something for everyone.

LEXIS/NEXIS counts over 7000 databases and includes each separate full-text magazine as a database. LEXIS/NEXIS's 7,338 "databases" include a total of 5.9 terabytes of information. Knight-Ridder's DIALOG service, on the other hand, counts only 500-plus separate databases but includes 9.2 terabytes of information. The same caution holds true when comparing number of systems. The 25 companies featured here collectively report a total of 54 systems, but each may define a system slightly differently. RLG and UMI, for example, considered all of their offerings as a single system with different interfaces or access means. UMI's ProQuest Direct (online), ProQuest (CD-ROM), and DataTimes subsidiary (online) are all reported as one system by UMI. At the other extreme, EBSCO and IAC describe each of their targeted products as separate systems. Hence, EBSCO and IAC each report six systems.

Choice or chaos?

Choices in formats, delivery methods, full-text access, and pricing policies will continue to be demanded by librarians and provided by database distributors and producers. Electronic information is no longer an adjunct to library collections but an important part of library sources and services.

At times the database marketplace seems rife with chaos because there is no one dominant technology and pricing policy. But technology and money are not the only concerns for libraries. Facilitating access to the most accurate, timely, and interesting information continues to be the most important role for libraries; to do so is just more complicated than it used to be. The products and services provided by these companies are part of the solution. The choice is up to you.

COMPANY PROFILES

R.R. Bowker 121 Chanlon Rd, New Providence, NJ 07974 888-BOWKER2 www.reedref.com

R.R. Bowker was a 19th-century publisher of reference books for libraries, and the 125-year-old eponymous company continues to publish books in printed form (Books in Print, Ulrich's, as well as other titles). Bowker is now a division of Reed Elsevier the international company that also owns LEXIS-NEXIS, Library Journal, School Library Journal, Publishers Weekly, and the newly acquired Bookwire, a web site. Bowker's databases are supplied by many other distributors (e.g., SilverPlatter, Ovid, OCLC, DIALOG), but Bowker also distributes its own files on CD-ROM, online, and via the web. In addition to libraries, which have long been Bowker's main target audience, bookstores are regular customers of the Books in Print series of products, both in print and on CD-ROM. Site licenses are available for Bowker's databases that are distributed on CD-ROM, or Bowker will provide databases on magnetic tape for local loading by libraries, library automation software companies, or consortia.

CARL Corporation 3801 E. Florida Ave., Suite 300 Denver, CO 80210 303-758-3030 www.carl.org

Like DIALOG and DataStar, CARL Corporation and its UnCover Company are being offered for sale by Knight-Ridder this year (see p. 33). CARL has only been a part of KRII for a little over a year, so it is difficult to speculate on what the sale will mean to this subsidiary and its new products. CARL has long been a factor in the library automation marketplace, and UnCover offers indexing and document delivery. dialog@carl is a new product and is the first database product designed by CARL specifically for the academic and public library markets. dialog@carl provides access to 300 databases from the DIALOG service and from RLG's CitaDel service through a web-based interface. Plans include the development of dialog@carl Uncover, which will include support of ILL and document delivery.

Chadwyck-Healey 1101 King St., Alexandria, VA 22314 703 4890 www.chadwyck.com

Chadwyck-Healey (CH) is known for arts and humanities databases. The company began as a collector and distributor of rarely found full-text and bibliographic humanities sources on microforms to academic and special libraries. It continues to provide microform collections but now also digitizes the information for distribution on CD-ROM and the web. Some of the Chadwyck-Healey collections are unique. Its LION collection (Literature Online) provides web access to the full text of English and American poetry, prose, and drama from 600 A.D. to the present. About 75% of LION literature is out-of-print. Starting this June LION will initiate a poet-in-residence feature. Matthew Sweeney, a British poet, will write poems for LION for six months, to be followed by Irish poet Eavan Bowland. CH's unique CD-ROM collections include Afro-American Poetry, complete poetical works of English and American poets, and recently declassified materials from the National Security Archive. Note that CH is phasing out most of its CD-ROM products and will offer most of its databases on the web.

Chemical Abstracts Service PO Box 3012, Columbus, OH 43210 614-447-3600 www.cas.org

CAS is the Columbus, Ohio-based arm of the American Chemical Society. Long known as the creator of Chemical Abstracts, the major bibliographic source for chemistry and the operator of the Chemical Registry System of more than 16 million substance records, CAS now also serves as a database distributor for its own and for other databases of interest to scientists. The STN International online system is a cooperative venture of CAS, FIZ-Karlsruhe in Germany, and JST in Japan. The STN command system provides access to over 200 bibliographic, directory, and full-text databases and is used by librarians, other search intermediaries, and scientists worldwide. SciFinder is a GUI system aimed at scientists who may not be expert searchers. CAS has recently introduced two web-based services. STN Easy provides access to 25 STN databases over the web and Chemical Patents Plus allows web searching for full-text patents. STN International's main competitors for providing chemistry and other scientific information online are DIALOG and Questel-Orbit. Ironically, the Chemical Abstracts bibliographic database is available through these competitors (and others) as well as on STN. Arguments between CAS and DIALOG over pricing and how much of the Chemical Abstracts database would appear on DIALOG were well publicized a decade ago.

Congressional Quarterly 1414 22nd St. NW, Washington, DC 20037 202-887-8500 www.cq.com

For over 50 years CQ has reported on Congress and on national affairs. In addition to its print products, CQ now offers its databases on CD-ROM through the CQ Researcher system, online through Washington Alert, and through the World Wide Web with CQ NewsAlert. NewsAlert provides continuously updated coverage of news, schedules, and voting information from Congress. It allows users to click on information about the Senate, White House, draft legislation, state information, and other breaking political news. CQ's focus is quite specialized--it provides full-text, fact-based reporting of Capitol Hill legislation. It plans to provide more web offerings and move into push technology.

EBSCO Publishing Co. 10 Estes St., Ipswich, MA 01938 508-356-6500 www.epnet.com

Publishing is part of the EBSCO Information Services Group. EBSCO Corporation is well known to libraries as a library subscription agent, but it expanded into database creation and distribution in the last decade when it purchased a small CD-ROM company that created the Magazine Articles Summaries database. EBSCO now offers its own and other companies' bibliographic and full-text information through several delivery means and systems aimed at specific target audiences, e.g., school, medical, and academic libraries, corporations etc. A majority of its customers purchase databases on CD-ROM, in particular the Magazine Article Summaries database. The EBSCOhost online system is growing in popularity and offers a proprietary Windows version, terminal version, and web interface. Although EBSCO's main electronic customers are libraries, last fall it introduced "Collectanea," a low-cost magazine full-text service aimed at the consumer market. In the library market, it has formed relationships with library online catalog companies to distribute the EBSCO databases as well. For general interest bibliographic and full-text information to libraries EBSCO's direct competitors are UMI, Information Access Company, SilverPlatter, and H.W. Wilson. EBSCO also offers a document delivery service for libraries.

Engineering Information Inc. 1 Castle Point Terrace, Hoboken, NJ 707330 800-221-1044

For 113 years, Engineering Information Inc. (Ei) has been primarily known as the producer of Engineering Index, a comprehensive interdisciplinary engineering database. Engineering Index (or EI Compendex, as its various electronic versions on a variety of online hosts and KR Ondisc are known) is still the main product of Ei. Why, then, include the company in this survey which focuses on database distributors and companies that create and distribute many different databases? Ei Village is a web-based service that puts Ei into the world of database distributors, or at least collectors or organizers of information resources. Ei Village combines access to EI Compendex, with pointers to a variety of engineering-related web sites, listservs, and human experts. Perhaps it is stretching it a bit to include Ei in this survey, but the Ei Village is an innovative example of what integrated topic-centered online services will be in the near future.

Gale Research Inc. 835 Penobscot Bldg. 645 Griswold St. Detroit, MI 48226-4094 515-961-2242 galenet.gale.com

Founded in 1954, and now part of Thomson Corporation's Reference Group, Gale Research is another one of those companies long familiar to libraries for its print products. Electronic versions of many of Gale's directories and indexes are available online through other online systems, but Gale distributes its own databases on CD-ROM and through GaleNet, a web-based service. GaleNet currently offers 25 databases, with another 12 expected by year's end. The GaleNet databases are now all ASCII text but enhancements with images, video, and audio are planned. Gale creates almost all of the databases it distributes.

Globe Information Services 444 Front St. W., Toronto, ON M5V 2S9 416-585-5345 800 268-9128, x5345 www.theglobeandmail.com

Globe Information Services, a division of The Globe and Mail, is a Canadian marketer of business and corporate information. Like Westlaw and Information Access Company, Globe is now a part of the Thomson Corporation. Info Globe Online was created in 1980, to be the exclusive provider of the full text of the Canadian newspaper The Globe and Mail. The online service now also provides access to other proprietary Canadian business reference and financial databases, as well as other Canadian newspapers, newswires, and magazines. Reference databases available on Info Globe Online focus on Canadian information, including Canadian Books in Print, Canadian Federal Government Online, Canadian Who's Who, and Index to Canadian Legal Literature. A gateway arrangement with Dow Jones News/Retrieval provides access to business news and information from the United States.

Individual, Inc. 8 New England Executive Park W. Burlington, MA 01803 617-273-6000 www.individual.com

In contract to most of the companies profiled here, Individual, Inc. focuses on "push" technology to provide desktop delivery of full-text business news to businesspeople. A firm may incorporate Individual, Inc.'s news services into its intranet or other LAN. Magazine and other current news information is sent to the company's server in a steady stream, while individualized profiles at each subscriber's desktop filter the stories likely to be relevant to that person. The focus is on current news information as part of a user's daily desktop routine. Individual, Inc.'s services are marketed to an organization as a whole, with information priced by number of users. The corporate library and information technology department are typically involved in contract negotiation and setup. In 1996, Individual, Inc. purchased the Hoover service from Information Access Company, which had been one of its main competitors.

Infonautics Corporation 900 West Valley Rd, Suite 1000 Wayne, PA 19087 800-304-3542 www.education.elibrary.com

Infonautics Corporation offers Homework Helper, first introduced a few years ago, and now the Electric Library service through consumer online services and the World Wide Web. Although 80% of the Electric Library's customers are schools, it is also used in some academic and public libraries. The Electric Library uses a natural language search interface and a relevance ranking search engine to allow students to access the full texts of magazines, newspapers, books, newswires, and TV and radio transcripts, plus image files of photographs and maps. Documents indicate grade level. Both CARL Corporation and Ameritech Library Services were involved in the development of the Electric Library, and they continue to distribute the system.

Information Access Company 362 Lakeside Dr., Foster City, CA 94404 415-378-5000 www.library.com

Originating with Magazine Index and an entrepreneurial spirit, IAC has grown to be a major producer of bibliographic, directory, and full-text databases and is now owned by Thomson. IAC has a continued reputation of entering new markets early and aggressively. Magazine Index was the first online bibliographic database that indexed popular literature, entering the online marketplace before Wilson was ready to take Readers' Guide beyond print. IAC was an early entrant in the optical disc arena, when its InfoTrac system was the first periodical index on 12" and then CD-ROM optical discs. InfoTrac is still a popular CD-ROM system in public, school, and academic libraries. IAC was a database pioneer in the scanning of full texts and still provides many full-text titles (e.g., Trade & Industry Database, Computer Database, Magazine Database) in addition to the bibliographic files it creates. IAC's databases are distributed on other online systems (such as DIALOG and LEXIS-NEXIS), and it distributes its own databases on CD-ROM (InfoTrac), online and through the web (SearchBank, e.g., General Business File, etc.), and through lease arrangements for local loading or local distribution (InSite). Different divisions for different markets were listed by IAC as separate services for this survey. It is a master at "slicing and dicing" its databases, with parts of the same databases sold under different names to different target markets.

Information America 600 W. Peachtree St. NW, Suite 1200 Atlanta, GA 30308 404-892-1800 www.infoam.com

Information America, founded 15 years ago offers access to nationwide public records, providing online information for 5000 companies in the business, law, and government communities. Information America's 16 online databases and gateway services to select Secretary of State offices can be used to conduct criminal, civil, and financial investigations. Customers can also order copies of liens, judgments, and real property filings from an online search.

Knight-Ridder Information, Inc. 2440 El Camino Real, Mountain View, CA 94040 415-254 7000 800-334-2564 www.krinfo.com

As we were going to press, Knight-Ridder had just announced its intention to sell its online services DIALOG and DataStar and its new CARL subsidiary (see InfoTech, LJ, May 1, p. 23). When Knight-Ridder purchased DIALOG from Lockheed in 1988, most in the information world thought it was a positive move because it was more appropriate for a newspaper company to run the major online service than a missiles and space company. Knight-Ridder now needs to raise cash to finance its purchase of several more newspapers and plans to concentrate on the newspaper business rather than the online service business. No one knows whether the three electronic services will be sold to the same company or return to their separate status. DIALOG, along with Orbit, has been the major supermarket online service for intermediaries since the early 1970s when it grew from a government contract project. It offers bibliographic, full-text, and directory databases on most subjects from many database producers but is particularly strong in scientific/technical, news, and business information. For many years DIALOG set the standard for online search systems with its command language interface and range of databases. Recently it has faced more competition, and its pricing has been under attack, but it remains a popular online system for expert searchers. Web access and specialized products aimed at end users are also available. DataStar was founded by Radio Suisse and was purchased by Knight-Ridder Information in 1993. It specializes in scientific and business information and is particularly strong in European business information. CARL Corporation (see p. 31), which offers online catalog software, the Uncover database, and document delivery became part of KRIL in 1996. KR Ondisc is a CD-ROM service that offers some of the same databases as are on DIALOG.

LEXIS-LEXIS PO BOX 933 Dayton, OH 45401-0933 800-227-4908 www.lexis-nexis.com

LEXIS was the first system to offer full-text databases and is still one of the largest providers of a variety of full texts. Founded as the OBAR (Ohio Bar Association) retrieval service in the 1970s, LEXIS pioneered full-text searching of legal materials. It was designed for use by legal professionals, who were subject experts but were often novice end users of information services. NEXIS was added to the LEXIS service in the early 1980s to provide full-text searching of newspapers, newswires, and magazines for its legal constituents and news professionals as well. Along with DIALOG (its major competitor in the library market), LEXIS-NEXIS throughout the 1980s and 1990s has been one of the most popular online search services by intermediaries in library and corporate settings. It has an active relationship with the Special Libraries Association and aggressively markets to corporate librarians. Users can search in native mode (a combination of commands and function keys) or with Windows or DOS-based front-end software. Either way, compared to other online systems used by intermediaries, LEXIS-NEXIS is relatively easy to learn. In the legal information world Westlaw is the major competitor. LEXIS-NEXIS was owned by Mead Data Central for many years but was sold to Reed Elsevier in 1994.

Moody's Financial Information Services 99 Church St., New York, NY 10007 212-553-0546 800-342-5647, x0546
www.moody.com/fis

Moody's has been collecting and compiling business and financial data for nearly 100 years. Its information is distributed on CD-ROM and is available online through DIALOG and Investext. Its strength lies in its unique financial and ratings data, in particular for the corporate marketplace, but it provides price discounts to academic and public libraries. Moody's information is highly focused and specialized, and it is primarily a content provider.

NewsNet, Inc. 945 Haversford Rd., Byrn Mawr, PA 19010 610-527-8030 800-52-0122 www.newsnet.com

Since its inception 15 years ago, NewsNet has focused on the special library and corporate market, which need access to trade and industry newsletters. Many of its full-text newsletters are online exclusively with NewsNet. In addition to newsletters, its 1000 full-text sources include newswires and trade journals. NewsNet's somewhat cumbersome online command language was replaced several years ago with a proprietary Windows-based software called Baton. Baton offers a GUI and uses the Personal Library Software relevance ranking search engine. Last year NewsNet introduced a low-priced web version (base price: \$19.95 per month) and will be

adding credit card payments on the web this year. NewsNet Smart-Mail will introduce E-mail delivery of current needs based on an individualized user profile.

OCLC Online Computer Library Center, Inc. 6565 Frantz Rd., Dublin, OH 43017-3395 800-848-5878 www.oclc.com

A leader in research and electronic products and services for years, OCLC provides 23,000 libraries in 63 countries with its wares. Like RLG, OCLC is a nonprofit membership organization that was founded to facilitate shared cataloging. Its cataloging, ILL, and other technical support systems remain popular, but it has expanded into reference services in a major way. The databases created by OCLC member libraries are available online and in web versions, as are many other bibliographic databases leased from a variety of producers. FirstSearch is OCLC's end user system, which is available online or through the web. Librarians endlessly debate just how friendly FirstSearch is, but there is no arguing with success. Five years ago FirstSearch almost single-handedly resurrected end user online searching in libraries before the web became commonplace. It now offers access to over 60 bibliographic, full-text, and directory databases on all topics and is used in 6000 libraries. OCLC Epic is its command language system aimed at expert searchers (and far less successful). OCLC SiteSearch software allows local loading. This year OCLC will introduce FirstSearch Electronic Collections Online, which will include indexing, full text, and images for 300 to 500 academic and professional journals.

Ovid Technologies Inc. 333 7th Ave., New York, NY 10001 212-563-3006 www.ovid.com

Ovid Technologies built its reputation in libraries as a distributor of CD-ROM databases, particularly medical files. The Windows software for these databases was an instant hit with CD-ROM reviewers and librarians. Since Ovid soon became the name most buyers associated with its products, CD Plus changed the company name to Ovid and no longer just distributes databases on CD-ROM. CD Plus purchased the old BRS online system from Maxwell Online, completely rewrote the BRS software, and added an Ovid menu interface to the BRS command language interface. Ovid Online targets universities, library consortia, hospital libraries, pharmaceutical firms, and governmental agencies. Although its database offerings include some general interest files, such as many of the H.W. Wilson bibliographic databases, Ovid's specialty is medical information in both bibliographic and full-text forms. Ovid's CD-ROM and online versions of Medline make particularly good use of the Medical Subject Headings controlled vocabulary.

Questel-Orbit, Inc. 8000 Westpark Dr., McLean, VA 22101 703-556-7444 www.questel.orbit.com

Questel-Orbit was formed when the French Questel company purchased the Orbit online system from Maxwell Online. Maxwell was only one in a string of owners of the Orbit system, which was started with a government contract in the 1960s at the Rand Corporation. Along with DIALOG, Orbit was one of the first commercial online systems, and throughout the 1970s DIALOG and Orbit (and BRS in the latter half of the decade) were the big supermarket systems for electronic information in libraries for searching by intermediaries. Some of Orbit's databases are the same standard bibliographic files that have always formed its backbone. It now specializes in intellectual property and scientific, technical, chemical, business, and news information. It is the first choice of many patent searchers, as it includes many U.S. and international patent files. Questel-Orbit is still aimed at intermediaries and expert searchers, employing a command language interface, specialized information, and advanced search features. This summer Questel-Orbit will introduce proprietary Windows-based software to allow searching without knowing the system commands.

Research Libraries Group 1200 Villa St., Mountain View, CA 94041-1100 415-691-2207 www.rlg.org

RLG, incorporated in 1975, is perhaps best known for its contributed cataloging service and suite of services for technical processing for its 155 members (academic libraries, national libraries, and archives) worldwide. But like its major competitor, OCLC, RLG now has several important reference services that provide access to its huge shared cataloging database (RLIN), other specialized databases, and document delivery services. Grouped together as "Information Discovery and Delivery," RLG offers an end user interface (Eureka) and a command interface (RLIN/Citadel) to the RLIN database and to other bibliographic databases primarily in the humanities and social sciences. Many of the databases can be found nowhere else and most focus on research information. For document delivery and ILL, the Ariel system uses Internet transmission to allow high-quality digital transmission between libraries and the RLIN system. RLG members are now working on building digital collections of scholarly research materials. The first collection includes multifformat materials on 19th-century family law and domestic relationships to be used by historians, sociologists, anthropologists, and other scholars.

SilverPlatter Information, Inc. 100 River Ridge Rd., Norwood, MA 02062 671-769-2599 www.silverplatter.com/usa

SilverPlatter began as a CD-ROM distribution company and became one of the most popular and one of the largest distributors of CD-ROM databases to libraries. It pioneered innovations such as CD-LANs in the late 1980s when people were speculating that networking CD-ROMs was impossible. It was one of the first CD-ROM distribution companies to offer a large enough group of databases on various subjects so that libraries could rely on SilverPlatter as their main CD-ROM vendor. The hundreds of SilverPlatter databases include subject specialties (Medline) and general interest (all the H.W. Wilson indexes). SilverPlatter still distributes databases on CD-ROM but as only one of its distribution methods. SilverPlatter's Electronic Reference Library (ERL) technology allows databases supplied by SilverPlatter to be locally loaded and searched using a library's interface of choice. SilverPlatter's web system (WebSPIRS) provides a consistent web interface to many databases.

SIRS, Inc. PO Box 2348, Boca Raton, FL 33427 800-232-7477 www.sirs.com

SIRS, Inc., a 24-year-old educational publisher, offers full-text general reference databases on CD-ROM and the web, primarily to schools, public libraries, and colleges. The SIRS Researcher database is a general reference product that includes selected full-text articles from magazines and newspapers on social and scientific issues. SIRS Discoverer is designed to develop research, reading, writing, language, and basic computer skills for elementary to middle school students. Last year it introduced web versions of both the

Discoverer and Explorer databases. CD-ROM and web versions are both sold for a flat annual subscription fee, with discounts for schools. SIRS Government Reporter provides government documents and legal information on CD-ROM. The SIRS Mandarin Library Automation system is marketed mainly to school libraries.

UMI 300 N. Zeeb Rd., Ann Arbor, MI 48103 313-761-4700 www.umi.com

UMI has been well known to the library community for 60 years, first as a provider of newspaper and specialized collections on microfilm, later as the source for accessing dissertations, and later still as a database producer and document delivery company. Although UMI chose for this survey to describe all of its electronic products and services as a single service, most people think of UMI as offering several related but distinct products. ProQuest is its popular bibliographic and full-text CD-ROM service (the first CD-ROM system to offer large image collections of magazine and journal articles), specializing in general interest magazines and business information. ProQuest Direct followed as the company's online offering, which has a proprietary Windows version and a WWW version. With UMI's huge collection of magazine rights, ProQuest Direct can offer links from bibliographic records to full articles in ASCII, image, or combination formats. Last year UMI purchased DataTimes of Oklahoma, an online system marketed primarily to special libraries. DataTimes continues to be run as a separate online system, but its databases are being merged into the ProQuest Direct system. UMI has few competitors in the dissertation and microfilm markets, but as a creator and provider of general interest magazine databases, it directly competes with EBSCO, Information Access, SilverPlatter, and Wilson.

H.W. Wilson 950 University Ave., Bronx, NY 10452 718-588-8400; 800-367-6770 www.hwilson.com

Founded over 100 years ago, Wilson continues to create bibliographic and full-text resources on many topics for the library market. Print versions of its well-known indexes have been a staple in libraries for years. For a company that markets almost exclusively to libraries, however, Wilson was rather late in going online. Wilsonline first came online in 1984 as a command language service offering access to the indexes created by the Wilson company. Wilsonline still exists, but it is now used so seldom that it is not marketed by the company. Instead, Wilson relies on providing access to its files through other online distributors (Ovid, FirstSearch, DIALOG, and SilverPlatter, for example). It also actively markets its successful CD-ROM product (WilsonDisc) to libraries of all types, and WilsonWeb will be introduced this year. In the past decade, the Wilson bibliographic databases have been enhanced with abstracts and, more recently, with full text.

TABLE 1: A Sampling of Customers by Library Type Academic Special Public School R.R. Bowker 26% 14% 50% 10% CARL 80% 5% 15% Chadwyck-Healey 80% 10% 5% 5% EBSCO 15% 8% 15% 62% Engineering Info. 30% 58% 12% InfoGlobe Online 10% 80% 5% 5% Infonautics 10% 10% 80% Knight-Ridder 40% 50% 10% Moody's 25% 50% 25% NewsNet 2% 92% 6% OCLC 28.2% 7.3% 12.4% 2.1% RLG 85% 10% 5% SilverPlatter 67% 30% 2% 1% H.W. Wilson 26% 5% 25% 44%

Source: 1997 Database Marketplace Survey

[TABULAR DATA 2 NOT REPRODUCIBLE IN ASCII]

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