



5-15-1998

Data Dealers Face Stormy Weather

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Recommended Citation

Tenopir, Carol and Barry, Jeff, "Data Dealers Face Stormy Weather" (1998). *School of Information Sciences -- Faculty Publications and Other Works*.
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Data dealers face stormy weather

Authors: Carol Tenopir and Jeff Barry

Date: May 15, 1998

From: Library Journal(Vol. 123, Issue 9.)

Publisher: Library Journals, LLC

Document Type: Cover story

Length: 6,882 words

Abstract:

Librarians should consider forming alliances to strength for negotiating the stormy database marketplace's flood of new information and new choices being promoted by database companies. Libraries must choose from among at least 29 database providers using 58 separate online, web or CD-ROM systems.

Full Text:

This report, the second annual Database Marketplace survey, analyzes information gathered from 29 companies serving the library market that responded to a survey distributed early in 1998. (In a few cases the 1997 information is used when companies had no changes to their products, services, or markets.) These 29 companies collectively distribute and produce information available through 58 separate online, web, or CD-ROM systems. In addition to factual data, the survey requested comments on each company's accomplishments and future plans, key goals and objectives, plus opinions about what issues in database distribution will most affect libraries in the future.

In the world of weather, 1998 is the year of El Nino; in the database marketplace world, stormy weather also prevails. Mergers, acquisitions, joint ventures, company failures, and a fickle marketplace together make the database arena more volatile than in recent years. Librarians are flooded with new information choices and additional options from old companies. Many of the trends reported last year (such as new web versions, a variety of pricing options, and full-text delivery to the desktop) continue, and librarians are helping information companies focus on the products, services, and pricing options they want most. They will also need to determine whether database companies are merely weathering the storm, are in full control, or are about to be swept out to sea.

Fishing grounds disrupted

The most obvious trend in the market is the sale of some major information companies. Knight-Ridder Information Inc. (KRII) ceased to exist in November 1997 with its sale by Knight-Ridder to the British company M.A.I.D plc. With the purchase, M.A.I.D decided to rename the two companies "The Dialog Corporation" after their most recognizable component. The Dialog Corporation includes the online services of DIALOG, Profound, and DataStar, plus Dialog OnDisc and several web-based end user services. The CARL Corporation, with its products such as UnCover, NoveList, and library automation software, doesn't reflect M.A.I.D's core strengths and is once again for sale.

A few things are notable (and, perhaps, unsettling) about this deal. Unlike most acquisitions, here the little fish swallowed the bigger fish. M.A.I.D has assumed a sizable debt with this purchase. Approximately one-quarter of the employees of M.A.I.D and KRII were let go (to eliminate redundancies and to be more efficient, according to Dialog). The new Dialog Corporation has promised to maintain DIALOG's strengths in scientific and technical information, although M.A.I.D. comes from purely a market/business emphasis. It also promises to support and to enhance the command "classic" DIALOG used by information professionals, although M.A.I.D's market has been mostly end users.

In a more common scenario, the big fish (some might say sharks) swallowed the smaller fish. Just a few months ago, Elsevier Science purchased Engineering Information, Inc. (Ei). (Ei responded to the 1997 survey but not this year since it went out as the purchase occurred. Elsevier Science declined to participate.) Elsevier adds the venerable Ei, with its well-known Engineering Index (Compendex) and Ei Village, to its significant online and CD-ROM product base. Since academic librarians particularly have been unhappy with Reed Elsevier pricing policies for their print and online serials, this announcement was met with some trepidation by many. Still, Reed Elsevier's purchase of Lexis-Nexis several years ago was hardly noticeable to most Lexis-Nexis customers.

All of these purchases see companies passing out of U. S. hands--M.A.I.D. is from the United Kingdom and Elsevier is from The Netherlands. Is El Nino sweeping U.S. companies overseas?

Falling off the cliff

We've all seen pictures of houses falling off cliffs in rain-soaked California. Some services that appeared in last year's survey have disappeared, too. Individual Inc. and Desktop Data, two services that delivered business information to the corporate desktop, merged to form NewsEdge. (NewsEdge declined to participate in this year's survey.) Both companies have undergone a fair amount of merging and reemerging in the last few years. Individual Inc. purchased the Hoover service from Information Access Company (IAC) in 1996, and in 1997 Desktop Data purchased Individual Inc. Together as NewsEdge perhaps these companies will at last find longer term stability.

Two years ago, UMI purchased DataTimes, the Oklahoma-based online newspaper service. UMI kept it going in parallel to UMI's ProQuest services until last year. UMI just didn't know DataTimes's main markets (corporate and special libraries), and those markets didn't know UMI. Most of the DataTimes content has been moved to UMI's ProQuest Direct, but faithful users of specialty online services such as DataTimes see a warning here. If your favorite small online company is purchased by another information company, it may fall off the cliff.

Another missing company is NewsNet. After 15 years of providing newsletters and other news materials online, NewsNet ceased operations in August 1997. Its founder and president, Andrew Elston, attributed this at least in part to the turbulence created by the World Wide Web. Free web versions of some of NewsNet's major sources and lower cost expectations by users certainly played a role in NewsNet's demise. Will the web drive more commercial online services off the cliff or provide a universal platform for commercial products and services?

Libraries disappearing?

Some companies may be rebuilding or even disappearing, but what about libraries? Infonautics announced in March 1998 that its online service "The Electric Library" will now be available to America Online (AOL) customers. Online companies claiming they replace libraries is not a new phenomenon. What is new is the huge numbers of people who now have access to online services. Services such as AOL and the web in general are becoming the first place millions turn to for information. But even a low price of \$6 per month may be too much for what is, after all, just a combination of content and search engine, without a personalized reference service.

A more common trend reported by the companies surveyed is to provide desktop or home delivery of certain products with a library or the parent organization behind the scenes paying for access. To an individual end user the information appears to be free and, unless the library puts a customized stamp on front-end software, appears to "replace" the traditional library. The library can provide a shelter from the information storm for its clients with these in-house services. NewsEdge's sole purpose is to deliver news and business information to the corporate desktop, while Dialog's intranet product DIALOG@site, IAC's Corporate InSite, and SilverPlatter's ERL provide services for the in-house market. The many Z39.50-compatible services from companies such as SilverPlatter, EBSCO, OCLC, and IAC can be used to provide reference materials online to library constituents through a library's OPAC software.

Building dikes

Both libraries and information companies are turning increasingly to safety in numbers through cooperative ventures, as if building dikes. Almost all survey respondents have alliances or partnerships, sometimes with their biggest competitors. QL Systems, the Canadian legal information service, offers a gateway service to its U.S. competitor, Westlaw; Hoover's makes its content available through Lexis-Nexis; Ovid has a partnership with the Institute for Scientific Information's (ISI) The Genuine Article service for document ordering; and SIRS Researcher is available through IAC's InfoTrac SearchBank, OCLC's FirstSearch, and other systems. Sometimes these partnerships serve to bring in new customers that may reach beyond a company's traditional markets.

Besides giving up on DataTimes, UMI found it couldn't attract enough corporate users to ProQuest Direct and in a surprise move halted direct marketing to them. UMI ProQuest Direct and Dow Jones Interactive (formerly Dow Jones News/Retrieval) will be sharing content but for different markets. UMI has agreed to focus on the school, academic, and public library markets, while Dow Jones gets the corporate and other special libraries market. By dividing the marketplace this way each builds on its traditional strengths and brings new content to libraries that did not want to purchase access to systems that don't know them well. Unfortunately for academic libraries, the ProQuest Direct prices may be higher than Dow Jones prices. One academic librarian told us that if she hadn't been grandfathered in as a longtime Dow Jones customer, the costs for access to Dow Jones materials in her university would have increased dramatically under UMI.

Sometimes these alliances and relationships get complex. PaperChase, for example, offers document delivery through Infotrieve, but Infotrieve's document delivery comes from CARL UnCover and the British Library, while the CARL UnCover database is also available through OCLC FirstSearch. DIALOG@CARL provides access through the CARL system to databases from both DIALOG and the Research Library Group's RLIN and CitaDel services.

High pressure

Cooperation has not completely replaced competition in this finite marketplace. The most formidable competition for companies is in the area of bibliographic and full-text general information. UMI, OCLC, IAC, EBSCOhost, and H.W. Wilson all concentrate on libraries and provide access to magazines and nonspecialist journal literature. They all offer CD-ROM, web, and locally loaded or remote online versions. And all deal with consortia or individual libraries and offer subscription-based pricing in addition to other pricing schemes. Each is aggressive in obtaining the online rights to full-text articles from primary publishers.

Knowing your marketplace is a lesson UMI learned the hard way last year, but even a company that knows its market intimately (like

H.W Wilson) is faced with strong competition in the electronic environment. OCLC's FirstSearch and WebFirst end user online services made early inroads into the library marketplace by getting there first. The others must share the remaining libraries in a sometimes high-pressure environment. Librarians have become fickle in their choice of end user online products; it is not unusual for a library to switch among IAC's SearchBank, EBSCOhost, and UMI's ProQuest Direct to get the best deal.

Intense competition leads to high-pressure tactics on both sides. Extended trials, free training for library staff, price reductions, or other incentives (we've even heard reports of companies offering to buy T-shirts and caps for library staff) are all available to libraries that ask. Librarians are learning to use free trials, low-cost initial subscriptions, or negotiated site licenses to get the best deals for as long as possible.

Widespread flooding

In agriculture, widespread flooding destroys crops and drives prices up. Electronic information flooding should have the opposite effect: lower prices as more information is available from more companies. Unfortunately, except on the web, that does not yet seem to be the trend. However, pricing is getting muddier.

Librarians may be accustomed by now to negotiating leases to get the best prices; in digital resources this is a necessity. Fewer and fewer information providers will provide an exact cost upfront. The most common responses to our questions about cost were "prices calculated for each unique situation."

Almost all companies report "subscription" or "flat-fee" pricing schemes, which are based on some sort of site license, but there are many variations within this. Site licenses may be based on total user population base (e.g., students in a college or residents for a public library), potential users (such as estimated corporate users), or simultaneous (concurrent) users. For example, IAC offers either unlimited site licensing or simultaneous user pricing (one user for General Reference Center is \$1610 per year). DIALOG@CARL charges \$12,500 per year for a single connection to its Basic Collection. The second to fifth concurrent users are charged at \$10,500 per connection per year. WilsonWeb charges \$2,995 per year for single-user access to Education Abstracts Full Text. Lexis-Nexis charges approximately \$3.75 per student in a 14,000-student university for its new Academic UNIVERse product.

In March 1998, Lexis-Nexis announced a new flat-price program for its approximately 140 college and university customers. Rather than calibrating access by number of ports and charging extra for documents and printing beyond a quota, the Academic UNIVERse program--available through the Lexis-Nexis subsidiary Congressional Information Service--gears a flat price to the number of FTE students and offers unlimited access to faculty and staff as well. "Annual costs may have gone up, but they're getting a whole lot more," said Judi Schultz of Lexis-Nexis. Campuses have until August 31, 1998 to migrate to this new system or negotiate new contracts without the expectation of the deep academic discounts of the past, and some ARL libraries have expressed dismay.

Some systems charge little (or nothing) for bibliographic access, instead relying on fees for each full-text article. CARL UnCover, can be searched in its "open access" plan for no fee, with a charge of \$10 per article ordered (plus copyright and FAX surcharges). Infotrieve provides free web access to MEDLINE, with a charge for each article ordered.

Document charges show that pay-as-you-go is not obsolete. Paying for either the amount of time you spend online, the documents delivered, or a combination of both makes sense for seldom-used resources or in environments where a client is charged back. All of the major online services such as DIALOG, Questel-Orbit, OVID, QL Systems, and others still offer pay-as-you-go options.

The best choice of pricing option is an individual decision, but small libraries should not act alone. Most companies will offer substantial discounts to consortia. Consortia are especially important since most information services are open to negotiation, and clout for the negotiating library most often comes with size. The price for Lexis-Nexis UNIVERse, for example, goes down to only \$1.85 per student for members of SOLINET.

The web flood

Web versions of commercial online systems made the biggest impact in last year's Database Marketplace. This trend has not slackened--nearly all online systems and many database producers now offer web versions. The web versions may soon become the most popular versions, but in most cases they still coexist with CD-ROM, DVD-ROM, locally loaded, or traditional online versions. Instead of the destructive power of a flood, with a few exceptions web versions are just helping to improve the terrain.

Ovid's new Java web client has been successful since its recent introduction, but most of the other online services have taken a more traditional web interface approach. The Dialog Corporation, for example, introduced a web version of DIALOG in 1997 that retains much of the traditional DIALOG searching features. Web versions of Research Libraries Group's Eureka end user service and OCLC's FirstSearch share popularity with their similar traditional online versions.

New companies, such as Infotrieve and Dawson Information Quest, rely solely on the web to attract customers. This reflects their emphasis on end users who are already web savvy. Traditional print publishers such as Hoover's and Dun & Bradstreet are using the web to directly reach their customers, while just a year or two ago customers of the digital versions of their products had to go to third-party vendors such as Lexis-Nexis or DIALOG.

Since the web provides a familiar interface for library patrons, web versions will continue to grow in popularity. Assuming response-time problems are resolved, the web should become the most popular platform many libraries.

A port in the storm

Too much information may have a flooding effect on the senses, however. Many information companies are taking this seriously and are building specialized information harbors as safe ports in the storm of information. Ei Village, one of the first, remains a successful model of how select web resources, human experts, bibliographic information, and full texts can be brought together. This year, ISI introduced its Web of Science to connect scientists with other researchers in their fields. Lexis-Nexis opened BizLogic for Big Business, which provides links to resources of interest to corporate professionals. IAC's LifeCenter provides information on specific topics such as finance and consumer issues, of particular interest to public libraries.

Libraries, too, are creating web interfaces to point patrons to useful information on a topic. The commercial web products provide a nice alternative for libraries that do not have the time or expertise to create special web spaces for their patrons. These specialized places are a useful way to help patrons cope with floods of irrelevant information.

Severe weather ahead?

El Nino is expected to end soon (although at least one forecaster predicts that La Nina this summer may be much worse). Storms in the database industry may be short-lived as well, although, like El Nino, may recur every few years. Additional mergers, acquisitions, and joint ventures are almost certain. Responses to the demands of the marketplace, such as the flurry of web versions and a variety of pricing options, will continue.

Several issues remain unresolved for database companies and the libraries they serve. Foremost are the cost and licensing of electronic information. Although libraries have many choices now, the overall costs of electronic information from commercial providers are often much greater than the costs of print. License and use policies for electronic versions are almost always more restrictive than print. As more information becomes available on the noncommercial web and as librarians protest high licensing fees, the pricing issue will become stormier. Librarians must be ready to form alliances, negotiate from a position of strength, choose from among alternatives, be willing to change as necessary, and, sometimes, just ride out the storm.

COMPANY PROFILES

R.R. Bowker

1121 Chanlon Rd., New Providence, NJ 07974 888-BOWKER2; www.reedref.com

The venerable 126-year-old reference company continues to publish Books in Print (now 50 years old) and many other print titles. Bowker is a member of the Entertainment, Media & Communications Unit of Cahners Business Information Company, Inc., which includes Library Journal, Publishers Weekly, School Library Journal, and the BookWire web site. Cahners Business Information is owned by Reed Elsevier. Bowker's databases are supplied by other distributors (such as SilverPlatter, Ovid, OCLC, and DIALOG), but Bowker also distributes its own files on CD-ROM and via the web. Books in Print on Disc (CD-ROM) targets bookstores and libraries, which are regular customers of Bowker's Books in Print series, while publishers are Bowker's target audience for its other services. 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, consortia, or library automation software companies.

CARL Corporation

3801 E. Florida Ave., Suite 300, Denver, CO 80210; 888-439-2275; www.carl.org

Like DIALOG and DataStar, CARL Corporation and its UnCover Company were sold to M.A.I.D by Knight-Ridder Information, Inc. (KRII) last fall. CARL had only been a pail of KRII for a year and is now being offered for sale by The Dialog Corporation. CARL, long a factor in the library automation marketplace, has recently become important to reference services. UnCover offers free access to the tables of contents of nearly 18,000 journal titles with fee-based document delivery services. DIALOG@CARL offers a web interface to over 300 online databases from DIALOG and the Research Libraries Group with a seamless link to the UnCover database. NoveList on the web, CARL's newest service, offers subject access to over 61,000 fiction titles, nearly a third of which include a full-text review or annotation. DIALOG@CARL features a new interface this year with links to document delivery services.

Chadwyck-Healey, Inc.

1101 King St., Alexandria, VA 22314 800-752-0515; 703-683-4890 www.chadwyck.com

Chadwyck-Healey began as a collector and distributor of rarely found full-text and bibliographic humanities sources on microforms to academic and special libraries. It now also digitizes the information for distribution on CD-ROM and the web. Its LION collection (Literature Online) provides web access to the full text of English and American poetry, prose, and drama from 600 C.E. to the present--about 75 percent of which is out-of-print. The company's newest product is the International Index to the Performing Arts, the first database devoted to performing arts periodical literature. Chadwyck-Healey's products include Afro-American Poetry, International Index to Music Periodicals, and The Teatro Espanol del Siglo de Oro (TESO), which offers the full text of over 800 Golden Age Spanish plays. The company is concentrating on making more of its databases available on the web.

Chemical Abstracts Service

PC Box 3012, Columbus, OH 43210 614-447-3600; www.cas.org

CAS is the Columbus, OH, arm of the Washington, DC-based American Chemical Society, which has been providing chemical information for 90 years. Long known as the creator of Chemical Abstracts, the major bibliographic source for chemistry, and 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 other databases. Its STN International online system is a cooperative venture with 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. STN also offers many web-based products for scientists, such as SciFinder, a graphical user interface (GUI) system. In July 1998 it will link to the web and other STN services. STN Easy provides access to 57 STN databases over the web, ChemPort links users to the web sites of eight scientific journal publishers in addition to the Chemical Abstracts databases, and Chemical Patents Plus allows web searching for full-text patents. The Chemical Abstracts bibliographic database is available through competitors like DIALOG and Questel-Orbit, as well as on STN.

Congressional Quarterly, Inc.

11414 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 and online through Washington Alert. This year it released "CQ.com on Congress," a web-based service that provides legislative news, tracking, and analysis. It allows searching on all CQ databases, including its bill tracking, committee coverage and schedules, and Congressional Record abstracts.

Dawson Information Quest, Inc.

5838 Edison Place, Carlsbad, CA 92008 800-422-3223; 760-431-7474 www.informationquest.com/

Information Quest, a new online service available exclusively on the web, consists primarily of bibliographic citations and tables of contents entries. Approximately 1100 full-text articles are provided in PDF image format only from IQ, but the service also offers links to CARL UnCover and the British Library for more complete document delivery and in 1998 will add a link to Acquire, a web-based subscription ordering service from Faxon. IQ's software supports natural-language processing and four search modes. Its target audiences include librarians, business professionals, researchers, and Students. Dawson IQ also has partnerships with Scandinavian University Press, Blackwell Publishing, and Cambridge University Press to provide their full-text content through IQ.

The Dialog Corporation

2440 W. El Camino Real, Mountain View, CA 94040-1400; 650-254-7000; www.dialog.com

Late last year Knight-Ridder Information Inc. was purchased by M.A.I.D. The KRII online services DIALOG and DataStar will be supported, along with the former M.A.I.D.'s Profound service, but DIALOG's CARL subsidiary is up for sale. DIALOG, along with Orbit, has been a major supermarket online service for intermediaries since the early 1970s. It offers bibliographic, full-text, and directory databases on most subjects but is particularly strong in scientific/technical, news, and business information. The new owners promise they will continue to support scientific and technical information along with the growing business information focus. For years DIALOG set the standard for online search systems with its command language Interface and range of databases. In 1997 it added a web interface to the "classic DIALOG" search system. DIALOG Select is a specialized web product aimed at professional end users while DIALOG@Site is for intranet access to the CD-ROM products. DataStar, founded by Radio Suisse, was purchased by KRII in 1993. It specializes in scientific and business information and is particularly strong in European business information. Dialog Ondisc (formerly KR Ondisc) is a CD-ROM service that offers some of the same databases that are on DIALOG.

Dun & Bradstreet Information Services

One Diamond Hill Rd., Murray Hill, NJ 07974 908-665-5732; www.dnbcorp.com

Long a formidable content creator whose main competitor is Standard & Poor's, D&B creates 21 bibliographic and directory databases available online through third-party commercial services such as DIALOG. Its Million Dollar Directory is available from D&B on CD-ROM and on the web. This summer, Dun & Bradstreet Corporation will officially separate into two independent companies: The Dun & Bradstreet Corporation (including D&B and Moody's) and the Reuben H. Donnelly Corporation.

EBSCO Publishing

10 Estes St., Ipswich, MA 01938 508-356-6500; www.epnet.com

EBSCO, a well-known library subscription agent, expanded into database creation and distribution in the last few years when it bought a small CD-ROM database company that created Magazine Article Summaries (MAS). EBSCO now offers its own and other companies' bibliographic and full-text information through several delivery means and systems. Most of its customers purchase databases on CD-ROM, in particular the MAS database. The EBSCOhost online system offers a proprietary Windows version, terminal version, and web interface. Separate products for corporate, medical, academic, public, and school libraries are listed separately in this survey. This year EBSCO has concentrated on improving the interface to EBSCO host and adding more databases. Although EBSCO's main customers are libraries, the Family Reference Network System provides general interest information to consumers. In the library market, EBSCO has formed relationships with online catalog companies to distribute the databases. For general interest bibliographic and full-text information, EBSCO's direct competitors are UMI, IAC, SilverPlatter, and H.W. Wilson.

Facts on File

11 Penn Plaza, 15th fl., New York, NY 10001-2006; 212-290-8090; 800-363-7976 www.facts.com/

Facts on File (FOF) is new to the Database Marketplace this year but not to the library market. It has been providing news in digest form on hot topics to schools and academic, public, and other libraries since 1941. Editors monitor major news sources to identify trends and stories, then verify and condense important events and add indexing. The World News Digest is available on CD-ROM and on the web through EBSCOhost, Auto-Graphics, OCLC, Ameritech VISTA, CARL, Winnebago, and online systems or library automation companies.

Gale Research Inc.

835 Penobscot Bldg., 645 Griswold St., Detroit, MI 48226-4904; 515-961-2242 www.gale.com

Founded in 1954 and now part of Thomson Corporation's Reference Group, Gale Research is long familiar to libraries because of its print products. Electronic versions of many Gale directories and indexes are available through other online systems, but Gale distributes its own databases on CD-ROM and through the web-based GaleNet. In 1997 Gale launched online versions of its DISCovering Program products, aimed at middle school through college students, ranging over topics such as literature, history, and science. Gale creates almost all of the databases it distributes. In 1998 Gale will launch "What Do I Read Next?," which will link to library online catalogs. It has a new deal to distribute West's Encyclopedia of American Law.

Globe Information Services

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

GIS, a division of The Globe and Mail, is a Canadian marketer of business and corporate information. Like Westlaw and IAC, Globe is now part of Thomson Corporation. Info Globe Online was created in 1980 to provide full text of the Toronto-based newspaper The Globe and Mail. The online service now also provides access to other proprietary Canadian business reference and financial databases and to Canadian publications. Reference databases on Info Globe Online include Canadian Books in Print, Canadian Federal Government Online, and Index to Canadian Legal Literature. A gateway arrangement with Dow Jones Interactive provides access to U.S. business news and information. Its target audiences are business researchers, lawyers, sales and marketing professionals, and information professionals.

Hoover's, Inc.

1033 La Posada Dr., Suite 250, Austin, TX 78752; 512-374-4500; www.hoovers.com/

Not to be confused with Sandpoint's old Hoover service (now swallowed up by NewsEdge), Hoover's is primarily a content company that has recently made inroads in web delivery of its well-known products, primarily to the corporate market. It provides access to information about both private and public companies. Online Hoover's information is updated daily and offers links to an "E-library" that provides news articles for a fee in addition to stock quotes and charts, career information, investing resources, and SEC filings.

Infonautics Corporation

900 W. Valley Rd., Suite 1000, Wayne, PA 19087 800-304-3542; www.education.elibrary.com

Infonautics offers Homework Helper and Electric Library through consumer online services and the web. Although 80 percent of Electric Library's customers are schools, it is also used in some academic and public libraries. It allows students to access the full texts of magazines, newspapers, books, newswires, television and radio transcripts, plus image files of photos and maps. Documents indicate grade level. Both CARL Corporation and Ameritech Library Systems were involved in developing Electric Library, and they continue as distributors. Electric Library is being revised this year with new search features, a new interface, and links to Internet content.

Information Access Company

362 Lakeside Dr., Foster City, CA 94404 415-378-5000 www.informationaccess.com

Originating with Magazine Index and an entrepreneurial spirit, IAC has grown to be a major producer of bibliographic, directory, and full-text databases. Now owned by Thomson, IAC has a reputation for entering new markets early and aggressively. Magazine Index was the first online bibliographic database that indexed popular literature, debuting before Wilson was ready to take Readers' Guide beyond print. Its pioneering InfoTrac system was the first periodical index on 12" and then CD-ROM optical discs. InfoTrac remains a popular CD-ROM system in public, school, and academic libraries. IAC was a leader in the scanning of full texts and still provides many full-text titles (e.g., Trade & Industry 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), and through lease arrangements for local loading or local distribution (InSite and others). IAC is a master at "slicing and dicing" databases, so parts of the same databases are sold under different names and to different target audiences. IAC's new president (Allen Paschal, founder of DataTimes) promises strategic acquisitions and a more customer-oriented approach in 1998 with products like LifeCenter (see p. 40).

Information America

Marquis One Tower, Suite 1400, 245 Peachtree Center Ave., Atlanta, GA 30303 800-235-4008; www.infoam.com

Information America, founded 16 years ago, offers access to nationwide public records and business information. The company provides online information for 50W entities in business, law, and government. 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 also can order copies of liens, judgments, and real property filings from an online search. Know-X is a web-based public records information service.

Infotrieve

10966 Le Conte Ave., 2d fl., Los Angeles, CA 90024; 800-422-4633; 310-208-1903 www.infotrieve.com/

The majority of Infotrieve's customers are end users rather than librarians, although it markets to academic and special libraries and enters into contractual agreements with library systems. It provides free web access to MEDLINE, with links to document delivery for a fee. California State University libraries use Infotrieve to supplement their interlibrary loan (ILL) services.

Lexis-Nexis

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

Lexis remains one of the largest providers of a variety of full texts. Lexis pioneered full-text searching of legal materials; it was designed for subject experts but often used by 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 legal and news professionals. Along with DIALOG (its major competitor in libraries), Lexis-Nexis since the 1980s has been one of the most popular online search services by intermediaries in library and corporate settings. In 1997 the company launched Academic UNIVERse, which revamped pricing for the large academic market, and Lexis-Nexis Xchange, improved front-end software. In 1998, it opened two web sites for industry information: BizLogic for Big Business and for Small Business. Searchers can use native mode (a combination of commands and function keys) or Windows or DOS-based front-end software. In the legal information world, Westlaw is the major competitor. Lexis-Nexis was bought in 1994 by Reed Elsevier.

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 compiled business and financial data for nearly 100 years. Its information is distributed on CD-ROM and is available online through DIALOG and Investext. Moody's Financial Information Services database of 10,000 public companies was recently made available on the web as Moody's Company DataDirect. 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.

OCLC Online Computer Library Center, Inc.

6565 Frantz Rd., Dublin, OH 43017-3395 800-848-5878; www.oclc.com

OCLC has long been a leader in research and electronic products and services for libraries around the world. Like Research Libraries Group, OCLC is a nonprofit membership organization founded to facilitate shared cataloging. While its cataloging, ILL, and other technical support systems remain popular, OCLC has expanded significantly into reference services. The databases created by member libraries are available online and in web versions, as are many other leased bibliographic databases. FirstSearch, OCLC's end user system, is available online or through the web to library users. Its bibliographic and full-text databases are available in nearly 11,000 libraries in 56 countries. The OCLC FirstSearch Electronic Collections Online Service was added to FirstSearch in late 1997 to provide access and links to full-text articles through a single web interface. In 1998 OCLC Epic, the command-language system aimed at expert searchers, will be phased out.

Ovid Technologies, Inc.

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

Ovid built its reputation as CD Plus, a distributor of CD-ROM medical databases. The Windows software for these databases, named Ovid, was so successful the company name was changed. The company bought 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, hospitals, pharmaceutical firms, and governmental agencies. 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. This year Ovid added a Java version of its well-received web interface and is concentrating on adding more full texts, especially medical titles. The Journals@Ovid service provides subscribers with web access to SGML-encoded scientific journals. In 1998 it will be developing content and software specifically aimed at the clinical practitioner.

PaperChase

350 Longwood Ave., Boston, MA 02115 800-722-2075; www.paperchase.com/

PaperChase is an end user service aimed at medical professionals to provide access to databases produced by the National Library of Medicine, including MEDLINE, AIDSLINE, CancerLit, and HealthSTAR. This year it hopes to merge these databases, something no other online vendor does. PaperChase can be accessed on the web, via traditional dial-up online or through CompuServe.

QL Systems Limited

275 Sparks St., Suite 901, Ottawa, ON K1R 7X9 800-387-0899, 613-238-3499; www.qlsys.ca/

QL Systems Limited is a Canadian company that specializes in Canadian legal, government, and parliamentary information. It also provides a gateway service to Dow Jones Interactive, Westlaw, and InfoGlobe. Like its major U.S. competitor, Westlaw (which declined to participate in this survey), QL Systems provides mostly full texts of laws, court judgments, and law review articles, with special links within them. QuickLaw is an easy-to-use interface; other "Quick" products include QuickTax and QuickNews. Besides law firms, QL Systems is most used by universities and accounting firms. The system's command interface is aimed at information professionals.

Questel-Orbit, Inc.

8000 Westpark Dr., McLean, VA 22102 703-442-0900; 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 began at the Rand Corporation in the 1960s. Along with DIALOG, Orbit was a pioneer commercial online system. Throughout the 1970s, DIALOG and Orbit (and BRS in the latter half of the decade) served as supermarket systems for electronic information in libraries searched by intermediaries. Orbit continues its standard bibliographic files but also specializes in intellectual property, scientific/technical, chemical, business, and news information. It includes many U.S. and international patent files. Questel-Orbit is still aimed at intermediaries and expert searchers, with a command-language interface and advanced search features.

Research Libraries Group

1200 Villa St., Mountain View, CA 94041-1100 415-691-2333; 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 academic library, national library, and archives members worldwide. Like its major competitor, OCLC, RLG operates several important reference services that provide access to RLIN, its huge shared cataloging database; 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 15 other bibliographic databases primarily in the humanities and social sciences. RLG has discontinued the CitaDel document delivery service, but RLIN supports ILL and the Ariel document transmission service, which digitally connects libraries and document Suppliers. In 1998, it is focusing on adding international and unique resources to the CitaDel files and will continue coordinating the creation of specialized digital collections by RLG members in the United States, U.K., and Canada. The first is "Marriage and the Law"; the second will be "Resources for the Study of Global Immigration."

SilverPlatter

100 River Ridge Rd., Norwood, MA 02062 781-769-2599; www.silverplatter.com/usa

SilverPlatter (SP) began as a CD-ROM distribution company. It became one of the most popular and largest distributors of databases on CD-ROM to libraries and pioneered such innovations as CD-LANs in the late 1980s. It was among the first companies to offer enough databases on different subjects to become libraries' main CD-ROM vendor. The more than 250 databases offered by SilverPlatter include subject specialty (e.g., MEDLINE) and general-interest titles (e.g., all of the Wilson indexes). SP's Electronic Reference Library (ERL) technology allows databases supplied the company to be loaded locally and searched using a library's interface of choice. SP still distributes databases on CD-ROM but uses other distribution methods. Its Web System (WebSPIRS) provides a consistent web interface to many databases. The company has been concentrating on adding more databases, providing links to full text, and improving its software. In 1997 SilverPlatter was one of the first information companies to offer a DVD-ROM product (MEDLINE).

SIRS, Inc.

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

SIRS, a 25-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, a general reference product, includes selected full-text articles from magazines and newspapers on social and scientific issues. SIRS Renaissance provides information on arts and humanities topics; first on CD-ROM, a web version will be made available on 1998. SIRS Government Reporter provides government documents and legal information on CD-ROM for Macintosh, with a Windows version due in June 1998. In addition to accessing SIRS's databases directly from SIRS, SIRS now licenses its content to IAC SearchBank, OCLC FirstSearch, and CARL.

UMI

300 N. Zeeb Rd., PO Box 1346, Ann Arbor, MI 48106-1346 734-761-4700; www.umi.com

UMI has been well known to the library community for 60 years, first as a provider of newspapers, etc., on microfilm, later as the source for dissertations, and later still as a database producer and document delivery company. These products all continue.

Although UMI chose to describe all of its electronic products and services as a single service, most people think of them as related but distinct. ProQuest is its popular bibliographic and full-text CD-ROM service (the first to offer large image collections of magazine and journal articles). ProQuest Direct followed as an online offering, having a proprietary Windows version and a web version. With UMI's huge collection of magazine rights, ProQuest Direct can offer links from bibliographic records to full articles. Last year UMI announced it would eliminate its DataTimes service, an online system marketed primarily to special libraries, and for its other services concentrate solely on the school, academic, and public library markets (and selected government libraries). Dow Jones Interactive makes UMI content available to the corporate and special library market; UMI offers Dow Jones content to its markets. UMI has few competitors in the dissertation and microfilm collections markets; its magazine databases directly compete with EBSCO, IAC, SilverPlatter, and Wilson.

H.W. Wilson

950 University Ave., Bronx, NY 10452 718-588-8400; www.hwwilson.com

Celebrating its 100th anniversary, 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 library staple for years. Wilson-line debuted in 1984 as a command-language online service offering access to the Wilson bibliographic databases. Wilson databases are available now through other online distributors (e.g., Ovid, FirstSearch, and SilverPlatter). It also actively markets the successful CD-ROM product WilsonDisc to libraries of all types. WilsonWeb currently provides access to 40 databases. In the past decade, the Wilson bibliographic databases have been enhanced with abstracts and, more recently, full text. The company aims to have at least 50 percent full text in its full-text enhanced files. Wilson OmniFile Full Text Select is a new database that will offer full text from 800 journals by mid-1998.

[TABULAR DATA 1 NOT REPRODUCIBLE IN ASCII]

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Source Citation (MLA 8th Edition)

Tenopir, Carol, and Jeff Barry. "Data dealers face stormy weather." *Library Journal*, 15 May 1998, p. 38+. *Gale Academic Onefile*, https://link.gale.com/apps/doc/A20652701/AONE?u=tel_a_utl&sid=AONE&xid=7bfd7a0e. Accessed 11 Nov. 2019.

Gale Document Number: GALE|A20652701