This year witnessed a new phase of competition following a period of research and development that aimed to provide alternatives to libraries, both in back-end automation and end user discovery. A variety of new solutions have emerged, often representing quite different conceptual models. In a continued trend, librarians seek solutions that immediately improve the experiences of their users, especially via discovery products; meanwhile, the number of complete integrated library system (ILS) replacements declined again this year.

New-generation automation
Products charting new territory in their approach to library automation—such as Ex Libris’s Alma and OCLC’s Web-scale Management Services—challenge longstanding integrated library systems such as SirsiDynix’s Symphony and Innovative Interfaces’s Millennium, which have been reinventing themselves by layering web services on top of their already mature functionality. While the traditional ILS continues to fuel the present phase of the library automation industry, these new products introduce fresh concepts and architectures. Nevertheless, they have yet to make an impact on the market, since they have only a small number of contracts representing early adopters.

Following a multiyear development effort, OCLC has entered the marketing and deployment cycle of Web-scale Management Services (WMS), a framework for automating libraries based on the WorldCat platform. WMS combines the functionality already available in WorldCat for cataloging, resource sharing, and discovery with the capability to perform circulation, acquisitions, and license management, thereby obviating the need for the library to operate an integrated library system. A small group of libraries, including the Samuel Roberts Noble Foundation, Ardmore, OK; Craven-Pamlico-Carteret Regional Library System, NC; Boundary County District Library, ID; Pepperdine University, Malibu, CA; and Simpson University, Redding, CA, have placed WMS into production, discontinuing use of their previous ILS.

Ex Libris continues development on its new unified resource management framework, recently branded Alma, to handle both print and electronic resources. Development partner libraries include Boston College; Princeton University, NJ; Purdue University, West Lafayette, IN; and Katholieke Universiteit Leuven, Belgium. A number of additional academic and research libraries have signed contracts to implement Alma as early adopters. Alma takes a new approach to library automation, with highly shared data models and capabilities to manage all types of library resources; it will be offered primarily through Software-as-a-Service deployed on cloud-based computing infrastructure. Two interim releases were delivered to development partners in 2010; a third was planned for March 2011, working toward a general release in early 2012.

The Kuali OLE (Open Library Environment) project, supported through a major grant from the Andrew W. Mellon Foundation, continues a two-year project to create a new-generation library management platform through a community-based open source development effort. Led by Indiana University in collaboration with a consortium of other universities, the project appointed Brad Skyles as project manager in 2010 along with other full-time staff in roles of quality assurance manager, business analyst,
and data architect. A Technical Council was formed, populated by key individuals from the development partner institutions. HTC Global Services, with facilities in Troy, MI, and Chennai and Hyderabad, India, was selected as a commercial development partner, contracted to provide services in quality assurance and system design.

The vision behind the Kuali OLE project looks beyond the architecture and design of the legacy ILS, providing an enterprise-oriented framework to support library operations. Kuali OLE will present the capability to manage and provide efficient workflows for all types of material in library collections, including both print and digital media. The framework will be designed to interoperate with other applications and components present in the enterprise infrastructure of these organizations—avoiding some of the redundancies inherent in the legacy ILS. Kuali OLE has just entered the software coding phase, and though it expands the concept of library automation, it is not expected to make a significant impact on the market beyond the libraries directly involved for at least a couple of years. Kuali OLE, blending both new concepts and open source development, with its completion a year or so away, stands as a tantalizing future alternative.

Open source vs. the proprietary ILS
Open source continues to resonate with librarians through its collaborative development spirit; Koha and Evergreen are making headway, though their path has not been without some detours and potholes. Ever larger library organizations have abandoned proprietary ILS products to adopt these open source alternatives, with mixed results. This year SirsiDynix and Innovative Interfaces were especially hard struck by open source competitors.

An intense battle rages between open source ILS proponents and vendors of proprietary products. (For more perspective on open source, see “The ILS Roundtable,” p. 36.) Several major library systems shifted from proprietary to open source ILS, including the Sage Library System of Eastern Oregon, migrating from Millennium, and the Pioneer Library System in New York, from SirsiDynix Unicorn. The King County Library System (KCLS), Issaquah, WA, with 46 branches and over 21 million annual circulation transactions, went live on its customized version of Evergreen on September 24, 2010, migrating from Millennium. KCLS gained the nod of federal grant-making agencies, through a $1 million award from the Institute of Museum and Library Sciences, matched by it own migration, training, data conversion, hosting, and ongoing support. Domestically, the Koha support business is split primarily between ByWater Solutions and LibLime, now a division of PTFS, following a very rocky acquisition that finally completed in March 2010. Despite sharp criticism by its competitors in the Koha support arena regarding its practices relative to the software and the principles of open source, LibLime delivered strong performance in gaining new support contracts, with 44 contracts spanning 63 libraries. In its second year of business, ByWater Solutions captured 40 contracts covering 155 libraries. Equinox Software, previously focused on...
services related to Evergreen, also began offering support for Koha, with 11 contracts this year.

Other organizations have become involved in providing services for Evergreen. The Minnesota PALS organization won a bid to implement Evergreen for the East Central Regional Library system as it migrated from SirsiDynix Symphony; Alpha G provides Evergreen support for the Killeen City Library, TX; PTFS Europe recently won a tender to provide Evergreen for a new consortium in the UK, comprising Stirling and East Dunbartonshire library services; and Lyrasis provides support to a small but growing consortium of libraries in Maine for their shared Evergreen ILS.

Firms offering proprietary systems have fought back against the assault of open-source systems by delivering more open access to their products through layers of web services and extended application programming interfaces (APIs). With robust APIs and thorough adherence to industry standards, proprietary automation products aim to provide programmatic access to the data and functionality of their systems to enhance interoperability and to allow libraries to extract data, customize features, or create new functionality. Ex Libris continues its open platform program, in place since 2008, which emphasizes the APIs available in each of its products and provides a space for libraries to collaborate and share code and ideas.

SirsiDynix has extended its Symphony ILS with Web Services to expose a selection of functionality that is available through its full proprietary API. The company released the third version of Web Services in November 2010, enabling several new features. One example of how Web Services extends interoperability involves bolstering BookMyne, the company’s free iPhone app. (While BookMyne is a free download, patrons will not be able to interact with their local library unless it has implemented Web Services.)

### Opponents go to court

A major legal battle in this broader struggle has erupted, with SkyRiver Technology Solutions and Innovative Interfaces, both owned by industry veteran Jerry Kline, challenging OCLC with allegations of violating antitrust laws, at this critical time of OCLC’s introduction of WMS into the marketplace. Plaintiffs SkyRiver and Innovative accuse OCLC of using its monopolies in resource sharing to shore up monopolies in bibliographic services and, potentially, in integrated library systems. With motions filed asserting and defending positions, it appears that this dispute, with its major implications for the library automation industry, will continue to play out for an extended period. Issues at stake include the position of OCLC as a nonprofit cooperative in a marketplace of commercial competitors, allowable pricing schemes, and whether commercial firms can gain access to WorldCat at reasonable rates.

### Competition on the discovery front

Products involving end-user interfaces and discovery represent an increasing proportion of the library automation market, especially as investments in new ILS products continue to decline. This round of competition—especially for academic libraries—involves bringing articles represented in a library’s subscriptions within the scope of search and determining which strategies deliver the best results. Products such as Ex Libris’s Primo Central, EBSCO Discovery Service, OCLC’s WorldCat Local, and Serials Solutions’ Summon partner with publishers and providers to gain access to materials to fill out their indexes. Each of these developers enters with competitive concerns that hinder and help their ability to gather content into their indexes. Serials Solutions, for example, as part of the ProQuest family, benefits from ProQuest’s position as a publisher and its ability to form partnerships in the broader con-

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**TABLE 1 THREE-YEAR SALES TRENDS AND SUMMARY**

<table>
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<tr>
<th>COMPANY</th>
<th>SYSTEM NAME</th>
<th>NEW CUSTOMERS 2006</th>
<th>2008</th>
<th>2009</th>
<th>2010</th>
<th>U.S. SALES</th>
<th>NON-U.S. SALES</th>
<th>TOTAL INSTALLED</th>
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*Numbers represented here are as reported by the vendors; blank spaces indicate that no data was provided, or companies gave only aggregate figures.

**SOURCE:** <LJ AUTOMATION MARKETPLACE SURVEY 2011>
tent community as it builds the Summon index. EBSCO likewise can extend the vast content within its bevvy of EBSCOhost products with third-party content. Ex Libris, not itself a content provider, builds its Primo Central index from a more neutral vantage point, though that has not insulated it entirely from competitive obstacles.

Competition can impede these cooperative arrangements. Since the discovery products of Serials Solutions and EBSCO directly compete, they do not help populate each other’s index. EBSCO recently withdrew from an agreement to provide EBSCOhost content to Ex Libris for Primo Central. More comprehensive central indexes will ultimately depend on a more tedious strategy of accumulating content from primary sources rather than depending on aggregators. Despite these issues, strategies for building more comprehensive discovery indexes currently have tremendous momentum, with content providers ever more open to contributing content. At a given tipping point, content absent from the major discovery products will face major disadvantages, as libraries turn to competitive providers willing to cooperate with their discovery services.

Against the tide of delivering article discovery through a central aggregated index, Innovative positions its Encore Synergy discovery product as able to deliver comprehensive access to a library’s subscriptions of articles through live web services interfaces with content providers. Innovative characterizes its use of web services as more sophisticated than federated search technology and able to outperform products based on prebuilt indexes. [For a comprehensive overview of the new discovery landscape, see “The Next Generation of Discovery,” LJ 3/15/11, p. 66.]

The industry moves to the cloud

One of the overwhelming trends involves a shift away from libraries operating their own installations of library automation products to some flavor of hosted service, including Software-as-a-Service (SaaS) and implementations based on infrastructure delivered through cloud-based services. Almost all new products launched in recent years have been designed for delivery through SaaS, and many of the legacy products have options for vendor hosting, often labeled as SaaS.

Auto-Graphics offers AGent VERSO primarily through SaaS arrangements involving complete hosting and management; Winding Rivers Library System, WI, opted for a fully managed, subscription-based arrangement, with local hosting. Apollo from Biblionix has been offered exclusively as a hosted service since its launch in 2008. To meet growing demand, Cuadra more than doubled its hosting capacity. Until recently CyberTools for Libraries has been available either for local installation or through SaaS. In 2010, all remaining sites relying on local servers shifted to SaaS. Infovision offers Evolve both for local installation or through software-as-a-service, which was selected by 22 out of the 73 libraries acquiring it this year.
LibLime reports that over 90 percent of its customers rely on Koha through this SaaS deployment.

Serials Solutions' strategy centers on SaaS, including its 360 Suite of products and Summon; in March 2010 Serials Solutions launched an SaaS version of AquaBrowser that was originally designed for local installation. SirsiDynix embraces software-as-a-service, both for its internal operations and how it delivers its own products and its customers'. The company offers both Symphony and Horizon through SaaS and reports that over 700 of its customer libraries rely on hosting through its managed data centers. To meet increasing demand for its software-as-a-service offerings, VTLS significantly increased the computing and network infrastructure it maintains to support its hosted products. New generation products such as OCLC's Web-scale Management Services, Ex Libris's Alma, and Kuali OLE all embrace software-as-a-service and highly shared data models.

The state of the industry
A traumatic year for libraries, in which painful—if not devastating—budget reductions prevailed, shaped the market for automation products and services. Procurements of new ILS products stand at relatively low levels, though a few companies reported increased sales this year relative to last. Ex Libris, for example, said it saw its strongest revenues ever from its ILS products. Interest in discovery products intensifies, as libraries seek to improve patron experiences even as a much-needed ILS replacement must be deferred. Products and services related to discovery and other aspects of web-based patron services represent a large market potential in the coming years, given the relatively high prices commanded by these products, the expectation that libraries must provide interfaces superior to the legacy online catalogs associated with their ILS, and the relatively small proportion of libraries that have yet to implement them. In academic libraries, the enormous expenditures for electronic content demand investment in solutions that increase visibility and stimulate use of these resources. Public libraries seek technologies to proffer better efficiencies, such as increased self-service, that stimulate stronger patron engagement.

The fiscal condition of libraries will inevitably leave its mark on the library automation industry, in both the long and short term. Given that the number of library facilities enters into the cost model for software licenses and support plans, any major trend toward library closings will mean reductions in potential earnings for those that cater technology products and services to this market. Reduced budgets will force libraries to consider deployment options more in line with new fiscal realities, favoring increased adoption of SaaS that produces savings on local infrastructure and personnel, greater participation in larger-scale shared automation systems of consortia or statewide systems, including those based on open source software, or other strategies that reduce per library technology costs. The library automation market will therefore shrink somewhat in any given geographic area. For companies to see growth, they must work even harder to gain a larger slice of the pie, and they will need to expand their penetration into other regions, library sectors, and product niches.

The overall size of the 2010 library automation market, as measured by the gross revenues of the companies involved seems to be on about the same level as prior years. Given that the industry is comprised of private companies with no requirements for disclosure, it's not possible to measure accurately the true size of the market. We estimate it is $630 million, roughly the same as LJ stated last year. This estimate does not include investments made by libraries in such products as self-check, automated materials handling, public workstations, and print management systems.

The giants of the industry
The automation marketplace includes companies ranging from large powerhouses to mid-sized businesses to small firms. Such a mix defies valid comparisons; even designating which company ranks as the largest isn't easily settled. OCLC as a whole clearly bests all the competitors in all categories, with over 1200 employees and total revenue of $228 million in FY09/10. Yet only a relatively small portion of the whole relates to the types of products covered in this report; OCLC's most recent annual report indicates 7.6 percent of revenue, or around $17.3 million, derives from the relevant category of Management Software. The giants of the industry are Ex Libris (3,542 on Aleph and Voyager), and Innovative (307). Ranking by libraries served, SirsiDynix (3,661 libraries on Symphony or Horizon) is first, then Ex Libris (3,542 on Aleph and Voyager), and Innovative (1,412 on Millennium).

<table>
<thead>
<tr>
<th>TABLE 3 PERSONNEL ANALYSIS*</th>
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<tr>
<td>COMPANY</td>
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<td>Auto-Graphics</td>
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*Numbers represented here are as reported by the vendors; blank spaces indicate that no data was provided.
SOURCE: LJ AUTOMATION MARKETPLACE SURVEY 2011
Sales leaders for 2010
SirsiDynix reported the largest sales with 126 contracts signed, including 47 new clients, plus 20 sites selecting Horizon.
Ex Libris’s 39 Aleph sales and five for Voyager are believed to represent the highest contract value in this year’s sales competition. The sale of Primo to 506 libraries, 635 subscriptions to bX Article Recommender Service, and nine contracts for Verde add considerable value to its sales performance.
The Library Corporation delivered exceptional sales performance with 43 new contracts, well above the 30 reported last year. Polaris also showed growth, reporting 40 new contracts in 2010, up from 33 the previous year. Major new contracts included the Denver Public Library; Chattanooga-Hamilton County Bicentennial Public Library; and Darien Library, CT.

Company Profiles

Auto-Graphics
Pomona, CA; 800-776-6939
www.auto-graphics.com
Auto-Graphics, founded in 1950 and involved in library automation since the 1970s, specializes in library automation and resource sharing products for public libraries, with the majority of its clients in the United States. In previous years, its AGent VERSO ILS sold primarily to individual small libraries. Following development efforts to rework the product to appeal to larger libraries, the company reaped success in 2010 with sales that included multisite consortia and regionals. Major sales included Harrison County Library System, MS (ten sites), Southwest Wisconsin Library System (30 sites), and Winding Rivers Library System, WI (35 sites).

PRODUCT NEWS AGent Iluminar, a new interface for AGent VERSO, was completed in 2009 and has since been licensed by about 65 percent of the customer libraries. Based on the Adobe Flex platform, AGent Iluminar provides a rich public user interface for AGent VERSO; reworking staff interfaces with Adobe Flex is currently under way as part of a phased redevelopment.

The company also offers resource sharing products, typically implemented on very large-scale statewide projects. This year saw major sales of AGent Search, the company’s federated search platform, to the Arkansas State Library as a portal spanning over 1000 libraries and to the Capital Sm@rtLibrary, Ottawa, to search over 40 collections. The company implemented its Circulation Interlibrary Loan Link module to the Vernon Parish Library, LA, to integrate its interlibrary loan (ILL) system, based on AGent Resource Sharing with the library’s Library.Solution ILS, reducing the effort required to process ILL requests, using NCIP for interoperability.

PEOPLE Personnel changes include Marc Robinson as sales director for North America and Jan Sheppard as Eastern Regional sales consultant.

BiblioCommons
Toronto, ON; 547-436-6381
www.bibliocommons.com
A Canadian company that develops and supports a discovery service based on social networking concepts, BiblioCommons saw significant expansion in its customer base in 2010. BiblioCommons has been adopted by a number of major libraries, including the Boston Public Library, Cooperative Computer Services consortium in Illinois, Oceanside and Santa Clara County libraries in California, Seattle Public Library and Whatcom County Library System in Washington, and Yarra Plenty Regional Library in Australia, in addition to Canadian libraries in Alberta, Ontario, and British Columbia involved in its initial rollout. BiblioCommons does not maintain a significant web presence, issue press releases, nor did it respond to this year’s automation survey. Yet the company remains vital in the library discovery services arena.

Biblionix
Austin, TX; 877-800-5625
www.biblionix.com
A private company headquartered in Austin, TX, Biblionix provides the Apollo ILS to small to medium-sized public libraries through Software-as-a-Service. The 87 new sites implemented in 2010 reflect the product’s strong momentum within its niche since its introduction in 2008, increasing the total customer base to 192. Twenty-four of these new sales result from a grant-funded project for the Central Texas and Alamo Area Library systems. Biblionix has seen success in providing modern automation for libraries operating outdated or unsupported systems such as Winnebago Spectrum, Athena, Circulation Plus, or Infocentre, or to those automating for the first time.

PRODUCT NEWS Product developments accomplished this year include increased geographical redundancy of its hosting facilities, 239.50 search through Apollo’s VersaCat online catalog module, and a Spanish version of the online catalog. The auto-calling module was extended to accept incoming telephone renewals.

ByWater Solutions
Santa Barbara, CA; 888-900-8944
www.bywatersolutions.com
A small firm specializing in support services for the open source Koha ILS, ByWater Solutions completed its second year of business with an impressive 40 support contracts representing 155 libraries, extending its roster of clients to 167. ByWater has won contracts both from libraries that have implemented Koha on their own or from other support firms and from a wide range of those moving from a proprietary ILS. MassCat, a multitype consortium of 70 Massachusetts libraries, shifted its Koha support and hosting from LibLime to ByWater, with migration completed in early 2011.

PEOPLE ByWater Solutions expanded in 2010, adding new staff for support and development, though still a very small firm of six employees. In addition to its own efforts, ByWater partners with BibLibre, a French Koha support company, for Koha software development, through an agreement announced in January 2010.

Cuadra Associates
Los Angeles, CA; 800-366-1390
www.cuadra.com
Focused primarily on special libraries, Cuadra Associates, originally founded in 1978, has operated since 2008 as an independent com-
pany under the ownership of SydneyPLUS. Cuadra employs 18. The company's core STAR technology platform underlies each of its application suites, including the STAR Knowledge Center for Libraries. Cuadra also offers solutions for managing archives, media collections, and tools for records management and implementing controlled vocabularies. In 2010, the company introduced STAR Knowledge Center for Archives, replacing STAR/Archives with a fully web-based environment. The company did not provide sales statistics for 2010.

CyberTools
Boston, MA; 800-894-9206
cybertools@librarians.com
A small firm of five, CyberTools develops CyberTools for Libraries, used by special and academic libraries. The company made 31 new sales in 2010, increasing its total customers to 326. CyberTools reports that over its 11 years of operation, it has increased its prices only once. Almost all customers are in the United States. The company moved its offices to Boston in the summer of 2010 and shifted to a new hosting facility with larger capacity. The move was accomplished with no customer interruptions.

EBSCO
Ipswich, MA; 800-758-5995
www.ebsco.com
Two of the divisions of EBSCO Industries, EBSCO Publishing and EBSCO Information Services, have major products within the scope of this report, though their broader business interests focus on products and services related to content.

PRODUCT NEWS EBSCO Publishing, based in Ipswich, MA, launched EBSCO Discovery Service (EDS) in 2010, a discovery product that competes with Serials Solutions' Summon and Ex Libris's Primo Central to provide comprehensive access to both local library collections and subscription-based article-level content through a central consolidated index. EDS offers what EBSCO calls “platform blending”—allowing EBSCO-hosted subject indexes to be leveraged along with the rest of the EDS index. This division also offers EBSCOhost Integrated Search, a federated search environment. EBSCO Publishing announced a new offering in early 2011 that allows libraries to use the EBSCOhost platform as their online catalog, alongside their EBSCOhost subscriptions. This product does not include the third-party content that distinguishes EDS as a more comprehensive discovery environment.

EDS as their discovery solution—including Northeastern University, Indiana University, and the University of Liverpool, among others—and the expansion of content represented in the EDS Base Index, which represents materials from some 20,000 content providers and metadata from 70,000 book publishers. It includes metadata for nearly 50,000 magazines and journals and six million books, among much other content.

EBSCO Information Services, based in Birmingham, AL, offers a variety of products related to the management of electronic resources including ERM Essentials, an electronic resources management (ERM) system launched in 2010, and LinkSource, an OpenURL link resolver available since 2005.

EOS International
Carlsbad, CA; 800-876-5484
www.eosint.com
With a focus on special libraries, EOS International is a private company that has been in operation since 1981.

PRODUCT NEWS EOS expanded the capabilities of its flagship EOS.Web platform with an ERM and an academic course reserves module both released in January 2010. EOS.Web Digital, released in August 2010, targets libraries with primarily digital collections. Sector-specific versions of the product were also put out for legal and medical libraries. This year the company also released major enhancements to its EOS.Web Reference Tracking module that provides support to libraries to track and coordinate research requests.

The 97 new sales for EOS.Web made in 2010 increase its total customer base to 1,097 libraries. The company employs a workforce of 52, down from the 66 reported last year. EOS International reported revenues in the $5–$10 million range, with 90 percent of its income from U.S. libraries. The company reported that it has entered into a marketing agreement with software firm Deep Web Technologies for its federated search platform.

Equinox Software
Norcross, GA; 877-673-6457
esilib.com
A firm specializing in the services surrounding open source library automation products, Equinox Software expanded its scope beyond the Evergreen ILS, which it has supported since its inception in 2007, to also provide services for the open source Koha ILS. Equinox was founded by individuals involved with the development of Evergreen by the Georgia Public Library Service and has continued as the leader in support and development of this system since becoming a private company.

Equinox participates in the development of Evergreen, though work also takes place outside the company. This year saw the release of Evergreen 2.0, which included significantly enhanced functionality, especially in the areas of acquisitions and serials management. Equinox was one of the contractors involved in the Evergreen implementation by the King County Library System, WA, the second busiest U.S. library by annual circulation. Other major Evergreen contracts included the Sage Library System of Eastern Oregon and the Pioneer Library System, NY. The original Evergreen consortium, PINES, in Georgia saw expansion through the addition of the North-west Georgia Regional Library; Evergreen Indiana also expanded significantly in 2010.

Ex Libris Group
Jerusalem, Israel; 800-762-6300
exlibrisgroup.com
Ex Libris, specializing in technology products for research, academic, and national libraries, ranks as the largest company in the industry in terms of personnel (504) and total customer libraries, and second-largest according to the count of libraries served by its ILS products, Aleph and Voyager (3,542). The company reports that its overall customer base—extending beyond libraries that use its ILS products to its offerings in other product niches—totals more than 4900 institutions. Headquartered in Israel, Ex Libris has wide international reach, with offices around the world and partners with distributors in many other countries. Leeds Equity Partners, a private equity firm based in New York, has owned Ex Libris since August 2008.

In terms of ILS sales, Ex Libris reported smaller numbers for 2010 than last year; the 39 new contracts for Aleph dipped from 47 reported in 2009. Voyager saw five new sales, providing some indication that this ILS continues to be supported, developed, and marketed with at least some degree of acceptance in the marketplace. At the same time, a few Voyager libraries migrated to other systems in 2010. Those numbers notwithstanding, Ex Libris reports that revenues from this year’s ILS sales set the company’s all-time record and include two national libraries, in Japan and Argentina.

The sale of Primo to 506 libraries expands its base to 756 institutions in 33 countries. The new bX Article Recommender Service has also found a receptive market, reaching 950 institutions after its second year on the market. SFX continues as the most widely deployed OpenURL link resolver, now serving 2,163 libraries. Sixty-two of the 126 members of the Association of Research Libraries use either Aleph or Voyager.

PRODUCT NEWS The ambitious venture to create Alma, a far-reaching unified resource management automation platform
that is poised eventually to supersed many of its current offerings, gives the company a strong position for long-term prospects in the next phase of the industry.

Ex Libris also has a deep penetration into libraries, with a diverse arsenal of products. In addition to Aleph and Voyager ILS tools, it offers Verde to manage electronic resources and Digi/Tool for digital asset management. Ex Libris competes on the discovery front with Primo and Primo Central, and it initiated the OpenURL link resolver genre with SFS.

It recently created the BX Article Recommender Service. More recently, the company tackled the extremely challenging problem of digital preservation through the creation of Rosetta. Through its R&D efforts, Ex Libris has produced products in each of the established categories relevant to academic and research libraries and has initiated new ones.

**People** The company devotes more resources to R&D than any of its competitors; the 174 personnel involved in development, or 35 percent of its overall workforce, represent almost double that of Innovative Interfaces and triple that of SirsiDynix. The company's investment in this area delivers results in terms of current sales of products that exploit an expanding list of product categories. Organizational changes made in 2010 include the appointment of Mark Triest as president of Ex Libris North America as Carl Grant shifts to chief librarian of the global company.

**Innovative Interfaces**

Emeryville, CA; 510-655-6200

www.iii.com

A private company owned by Jerry Kline, Innovative Interfaces ranks as one of the largest companies in the industry, providing automation products primarily to academic and public libraries. The company continues to be one of the major players in the United States, but its reach extends to many international markets, with about 35 percent of new sales this year going to non-U.S. libraries. Indeed, Innovative has installations in 52 countries on six continents. The company reported revenue in the $80-$90 million range, with 30 percent derived from libraries outside the United States.

The 39 new contracts for Millennium this year, representing 51 libraries, brought the total installed base to 1,412 libraries. Sales for Millennium have declined from its height of 144 in 2003. This year Innovative signed 56 contracts for its discovery product Encore, down from last year’s total of 109. The company reports a total of 256 libraries in 20 countries now using Encore.

**Product news** Innovative completed development of Encore 4.0 and launched Encore Synergy, an extension of the product that uses web services to bring article-level content within the scope of discovery. Release 2009B of Millennium included new web services for patron account data interchange, SMS alerts for notices to library patrons, support for PayPal payments in its e-commerce module, and expansion of services for mobile devices.

In 2011, Innovative's Encore 4.1 release will, according to the company, feature batch requesting, advanced searching, revisiting of previous search strategies, multiple portfolios for article databases, expanded faceting, and access to an integrated article content provider, HeinOnline, at law libraries. The company will also roll out a freely available Zoombo iPhone app, which will allow patrons mobile access to library catalogs.

**People** In 2010, the company made major organizational changes with the promotion of Neil Block to president, followed by a cascade of other advancements, including Mary Chevreau to VP of North American sales, and Hillary Newman as VP of library services, as well as John Rose, director of new sales, North America, and Hamish McDonald, director, Asia-Pacific sales.

Jerry Kline takes the role of chair as he turns responsibility of daily operations over to Block. (Kline also owns SkyRiver Technology Solutions, a company he founded in 2009 to provide bibliographic services to libraries, which along with Innovative filed suit against OCLC in 2010, accusing the nonprofit of anticompetitive practices.)

Innovative reported total personnel of 307, a slight reduction from the 315 reported last year.

**Keystone Systems**

Raleigh, NC; 800-222-9711

kla.com

Keystone operates within a unique niche involving libraries that serve people with visual disabilities. A small company with 17 personnel, it offers specialized products and services for its customer libraries. This year the company launched a new initiative, called the SHared ELectronic Files (SHELF) Project, a national repository of titles recorded by Talking Book Libraries; Keystone provides a platform for storage, search, and retrieval of these materials. The company reported no new sales of its KLAS ILS, with the customer base holding steady at 108 institutions.

**The Library Corporation**

Inwood, WV; 800-325-7759

www.tlcdelivers.com

The Library Corporation, marking its 37th year of operations, offers two ILS products: Library.Solution, which serves all but the largest libraries, and CarlX, designed for large municipal or county libraries and consortia. The company focuses primarily on public libraries and K-12 schools, with some small academies.

This year the firm won 43 contracts representing 191 libraries for Library.Solution, including public libraries, school districts, and small academies, increasing the total installations to 749. In a year where most vendors reported declines, sales for Library.Solution increased significantly over the 30 reported in 2009 and represented the highest reported for the company since 2005. Three libraries, including two large county systems and one municipal, upgraded from the company's legacy Carl ILS to CarlX—good news given the high value of these large systems. The company saw significant adoption of its LS2 PAC: with 58 sales reported; 38 purchased LS2 Kids; and six libraries selected the new LS2 Mobile app.

**Product news** Development completed this year included LS2 Mobile, an app for the iPhone, iPad, or iPod Touch enabling access to the online catalog of participating libraries using LS2 PAC with any of the company’s ILS products. The company released
Advanced E-Commerce for a more streamlined process of collecting fines and fees. For school districts, a module for Textbook Management and Asset Tracking was delivered in July 2010.

**PEOPLE** TLC employs a workforce of 199, slightly higher than the 197 reported last year.

**OCLC**

*Dublin, OH; 614-784-6000  
www.oclc.org*

OCLC, a major worldwide membership organization, has increasingly become involved in the library automation industry, both through business acquisitions of commercial library automation companies and through its own development of new products. Traditional ILS products under OCLC's domain include OLIB, used by special libraries primarily in the UK; SISIS-Sunrise used by public libraries mostly in Germany, Austria, and the Netherlands; Amlib, one of the major public library products in Australia; and the LBS and CBS systems produced by the former PICA organization in Europe. OCLC also acquired other automation products including linking technologies and an e-journal knowledgebase from Openly Informatics, VDX resource sharing platform from Fretwell-Downing, and the EZProxy utility for remote authentication, as well as the CONTENTdm digital asset management system. OCLC continues to support and enhance most of these products. (OCLC did not provide detailed sales statistics for its products.)

**PRODUCT NEWS** This year saw the first implementations of Web-scale Management Services (WMS) by a handful of libraries in the United States. OCLC also won the tender issued by the BIBSYS consortium in Norway for about 100 academic libraries. Contracts representing 130 libraries for WMS were reported for 2010.

OCLC also competes in the arena of discovery products with WorldCat Local, which can be used in conjunction with an existing ILS to provide broad discovery of books and articles. OCLC has loaded large numbers of article data into WorldCat, creating a comprehensive index in the same vein as products such as Serials Solutions' Summon, EBSCO Discovery Service, and Ex Libris' Primo Central. The installation of WorldCat Local for a library ideally involves what OCLC terms "a reclamation process" that synchronizes the library's holdings as represented in its local ILS with WorldCat. At no additional cost, OCLC offers libraries with existing subscriptions to FirstSearch a version called WorldCat Local Quick Start, but it does not include the reclamation process. OCLC reported 752 libraries selecting WorldCat Local in 2010, increasing the total libraries to 1,419. These numbers include both those taking advantage of the WorldCat Local Quick Start program as well as those with paid subscriptions to the fully supported version of WorldCat Local. Libraries implementing WMS use WorldCat Local as its public interface.

**Polaris Library Systems**

*Syracuse, NY; 800-272-3414  
polarislibrary.com*

Polaris Library Systems, based in Syracuse, NY, focuses on library automation products for public libraries, primarily in the United States. The company does not report its range of revenue.

The company reported 23 new contracts in 2010, representing 42 libraries and 139 individual facilities. All but one sale were to U.S. libraries. Its installations now total 374. Polaris has been implemented in many large consortia, and in recent years the company has made sales to large municipal libraries, based in part on its responsiveness to library needs.

Major contracts won this year include Sno-Isle Libraries, Marysville, WA; Denver Public Library; Chattanooga-Hamilton County Bicentennial Public Library; and Darien Library, CT.

In October 2010, Polaris announced a partnership with the Syracuse University School of Information Studies (iSchool)—a rare case of direct cooperation between a vendor and a library school. A Polaris ILS was installed at the school for use in library classes. Polaris had in the past provided internships and even hired iSchool students, and its staff had previously assisted with some iSchool classes.

**PRODUCT NEWS** In 2010, the company released Polaris Version 4.0, which included a variety of new features including a new Mobile PAC, SMS notifications for circulation updates, automatic search suggestions in the online catalog, and social bookmarking capabilities.

The company reports increased customer use of the API available for programmatic access to the Polaris ILS.

**PEOPLE** In early 2010, the ownership of the company changed through an employee buyout, with significant investment from local businessman Jim Carrick, named chair in May 2010. Polaris employs 78 people, down only two positions from last year.

**PTFS—LibLime**

*Bethesda, MD; 301-654-8088  
www.liblime.com*

PTFS began 2010 with the acquisition of LibLime, the original support firm established in the United States to support the open source Koha ILS. The rocky acquisition process completed in March 2010 with PTFS combining LibLime with its already established Koha support business. PTFS Europe, a partially owned business partner, provides support for Koha in its region. In October 2010, the UK-based Halton Libraries selected Koha with support from PTFS Europe—the first public library in the UK to select an open source ILS.

One of LibLime's key offerings involves a private version of Koha hosted on the Amazon EC2 platform, with features developed with financial support from its customers. The company has a partnership with the Westchester Academic Library Directors Organization (WALDO), NY, for the development and distribution of Koha to academic libraries. In 2010, the company completed the development of 116 new features for Koha.

PTFS's vision for Koha involves integration with its own Archival Ware content management platform to produce a Digital Library System that provides automation for libraries across both print and digital resources.

The company reports that it signed 44 support agreements covering 63 libraries in 2010, resulting in 147 new libraries for which it provides Koha support services.

**Serials Solutions**

*Seattle, WA; 866-737-4257  
www.serialssolutions.com*

A division of ProQuest, Serials Solutions offers a variety of services to support libraries in the management and access of electronic content. ProQuest is part of the Cambridge Information Group (CIG). R.B. Bowker, also part of CIG, now operates under the common management of ProQuest while retaining its own brand.

While Serials Solutions does not offer an ILS, its products fall into many of the other categories covered in this report. Its products include the 360 Suite—the 360 Link OpenURL link resolver, KnowledgeWorks, a comprehensive knowledgebase of e-journal holdings, 360 Resource Manager for ERM, and 360 Search, a federated search platform.

Serials Solutions also oversees the AquaBrowser discovery product, originally created by Mediabah Solutions in the Netherlands and acquired by Bowker in June 2007. In 2009, an internal reorganization of CIG shifted responsibility of AquaBrowser to Serials Solutions.

**PRODUCT NEWS** In 2009, Serials Solutions launched Summon, which it characterizes as a web-scale discovery service that aims to provide access to both local collections and the articles represented in its subscriptions to electronic resources through a comprehensive index. Serials Solutions continues to increase the coverage of the Summon service,
which now includes content from over 6800 content providers, with over 600 million articles represented in its index. The company reported 164 libraries subscribing to Summon in 2010, bringing the total installed base to 170. In March 2010, Serials Solutions announced a database recommender feature for Summon that analyzes queries to recommend additional research tools that may not be represented directly in the index. Throughout the year, the company issued a series of announcements that chronicle new libraries adopting Summon and new partnerships to expand its coverage.

New product developments in 2010 included the launch of 360 Access Control, a hosted proxy service using a single sign-on that allows libraries to streamline access to their electronic resources to users. This product competes with the popular EZproxy service, acquired by OCLC in March 2008, with a hosted version made available in December 2010.

**SirsDynix**
Provo, UT; 800-288-8020
sirsdynix.com
SirsDynix, owned by private equity firm Vista Equity Partners since December 2006, offers a broad range of automation products to libraries throughout the world, with customers in 70 countries. It stands as the industry's largest in terms of libraries using its ILS products, with 3,661 using either Symphony or Horizon. This year the company reported 385 total personnel, considerably below the 491 reported in 2007, the last year for which data is available for comparison. SirsDynix slimmed down its workforce as it has worked through a business integration process, creating a single unified organization. SirsDynix reported that it invested $16 million in research and development this year and indicated that 60 of its personnel work in R&D.

The company saw a strong sales year, with a total of 126 contracts for Symphony, 47 of which were to new customer libraries, including 71 contracts to U.S. libraries. The company reports a total customer base of 2,255 libraries using Symphony, with 902 K-12 schools, 401 public libraries, and 451 academic libraries. SirsDynix also reported 20 new sales for Horizon. SirsDynix Enterprise faceted discovery service was selected by 75 libraries, increasing its installed base to 175.

**PRODUCT NEWS** SirsDynix completed releases on both of its ILS products, Symphony 3.4, released in December 2010, included enhancements such as improved search and edit features and batch processing that result in better efficiencies for librarians, more flexible system policies to support consortia, and new reporting tools. Horizon 7.5a was put out in May 2010 and included an expanded operating system and database options.

Product developments completed in 2010 include Web Services 3.0, an open API layer that provides interoperability for Symphony through industry-standard technologies. Web Services allows libraries a flexible approach to connect external systems with Symphony. SirsDynix’s iPhone application, BookMyne, relies on a library’s implementation of Web Services to provide mobile access to its catalog. The company reports BookMyne in use by 200 customer libraries, with over 9000 free downloads through Apple’s App Store by library users. Web Services for Horizon are being developed to provide similar capabilities. This year also saw the release of SirsDynix Portfolio, a new digital asset management platform based on BrainWare technology, sharing a similar architecture as the company’s Enterprise discovery product. The company reported 13 contracts for Portfolio in 2010.

**PEOPLE** SirsDynix closed 2010 with a change in management, with Gary Rautenstrauch shifting into a new role as executive chairman as Matt Hawkins took over worldwide company operations as CEO. Bill Davison rejoined the company as COO.

The company executed a major reorganization to centralize development and support in its Provo, UT, HQ. Offices in St. Louis and Huntsville, AL, were closed. The company now delivers primary support, domestic and international, through this new 24/7 facility, with personnel available in all the major languages relevant to geographic regions of the company’s customer base. As part of its efforts to improve service and support, SirsDynix instituted a new program of Library Relations Managers to coordinate customer support and operational issues, led by VP Berit Nelson.

**Surpass Software**
Calhoun, GA; 706-625-5399
surpasssoftware.com
Surpass Software, a small company of nine people in business for 25 years, offers a suite of integrated library systems for different types of libraries. Surpass Centrica provides a centralized approach to automation, while Surpass Select targets individual libraries. Specialized versions are available for small libraries and church libraries. The company reported 69 new sales of its ILS products in 2010 and that it expanded its hosting facilities but did not provide additional details in response to this year’s survey.

**VTLS**
Blacksburg, VA; 800-466-8857
www.vtls.com
VTLS, in business for 25 years, remains privately held and reports that it operates free of debt. The company employs 96, down from the 107 reported in 2009 but in line with previous years. It reported 22 new contracts for Virtua representing 92 libraries, up a bit from the 18 signed last year (all but two were outside the United States), 34 contracts for Chamo (390 libraries), and seven for its VITAL institutional repository platform (87 libraries).

**PRODUCT NEWS** Developments this year included continued enhancements to Chamo, the company’s discovery-layer product, such as new Drupal interfaces, customizable views, support for notifications for renewals and other alerts through SMS, and display of queues and history of items currently charged in the patron’s profile.

A major project for the company involved the preparation of Virtua for the Hong Kong Public Libraries, a contract won in 2009 for one of the largest public library systems in the world. The project included new software development, the design of which was completed in 2010 with active development ongoing in 2011, working toward implementation of the initial phase in September 2011.

In collaboration with the Queens Library, NY, and using development from both the library and VTLS, Queens has built a comprehensive technology environment to support its operations, called the daVinci Open Library Platform. It plans to market daVinci to other libraries. daVinci includes a variety of components including VTLS’s Virtua ILS, which Queens acquired in 2008, and VITAL, purchased this year, along with open source components such as Drupal, Apache SOLR, a MySQL database, Fedora Commons digital asset management, and Lucene.

Many other new features are slated for development in daVinci, including a recommendation engine that will allow patrons to save search histories, community-oriented news and information for the Queens Library’s 62 branch library sites, a mobile website, and a mobile app.

VTLS has offered support for FRBR in its systems for eight years and has recently added support for RDA (resource description and access). In 2010, the company launched a project called the RDA Sandbox, which allows catalogers, including those using other systems, to experiment with RDA through the Virtua cataloging client.

One of the major contracts won by VTLS this year was its selection by the Library of Congress to support procurement of materials through its international offices. This project, scheduled for completion in 2011, will be based on a customized version of VTLS’s Virtua acquisitions module.