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The Rush to Innovate.

**Authors:**

Breeding, Marshall

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**Abstract:**

The article focuses on innovations in the library automation industry (LAI) in 2012. It comments on increasing revenues in LAI including a shift in the industry to software as a service and other hosting arrangements which lets libraries shift capital costs to fixed annual subscription payments. It talks about mergers and acquisitions in the LAI and mentions the LAI companies Ex Libris and Innovative Interfaces.

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## The Rush to Innovate

### Features

#### [Library automation industry saw notable transitions in 2012](#)

In this time of transition of the library automation industry, stakes are high for the vendors that are creating innovative -- or even transformative -- products and competing to bring these products first to the market. Establishing momentum early is essential in the library arena, which is attentive to the successes of a vendor's peers and risk averse.

In the library services platform arena, OCLC's WorldShare Management Services, Innovative's Sierra, and Ex Libris's Alma hit the streets first and have already begun aggressive sales cycles, seeing positive results. Serials Solutions finds itself in the position of urging its customers to wait for Intota, in stark contrast to its early entry into the web-scale discovery arena with Summon. The Quali OLE project continues to make great strides but has extended its time line for delivery by a year.

Developers of integrated library systems (ILSes) have executed ambitious development agendas to extend and integrate new services into their products to challenge the notion that innovation can be accomplished only in the newly minted systems. Seamless ebook integration, web-based interfaces for staff and patrons, and built-in social networking capabilities will soon be standard fare for many ILS products.

Recent investment activity also seems to be centered on strengthening product development. The new investors in Innovative Interfaces and Ex Libris show early signs of expanding capacity for creating new technologies with the potential for long-term gains and not slashing costs for short-term gains. Especially among the large companies, the number of personnel allocated to development is on the rise.

## [The state of the industry](#)

The library automation industry continues to expand modestly both in the United States and internationally. Although library automation is by no means a high-growth market, a variety of factors contribute to steadily increasing revenues, including an industrywide shift to software as a service (SaaS) and other hosting arrangements. Hosting allows libraries to shift capital costs from the purchase of local technical infrastructure and ongoing related personnel and data center costs to fixed annual subscription payments. Vendors providing these services gain that revenue and incur significantly lower costs as they rely on infrastructure-as-a-service providers, or their own large-scale data centers that deliver the computing resources needed per installation at much lower costs.

Many companies have been able to grow by penetrating new international markets. They often displace systems active in local markets unable to keep pace with the changing cycles of technology or the demands of libraries as they become increasingly involved with electronic and digital collections in addition to traditional print materials.

Especially in the academic sector, libraries find themselves needing to make additional investments in discovery products above and beyond their existing budgets for library automation. Massive investments in subscriptions to an increasingly complex array of electronic content products requires at least some additional overhead expense to provide simpler means of access and to ensure adequate levels of use.

For the 2012 calendar year, we calculate the library technology economy, including the total domestic and international revenues of all the companies with a significant presence in the United States or Canada, at \$770 million, an increase of just under three percent relative to last year's estimate of \$750 million. A narrower view limited to only U.S. revenues of these companies would total around \$475 million. When looking at the global library automation market, we estimate aggregate revenues of around \$1.8 billion, which would also include radio-frequency identification (RFID) and other self-service products in addition to the technologies related to library management and resource discovery.

## [Investments & acquisitions](#)

Following a period of relative calm on the mergers and acquisitions front, 2012 saw ownership transitions in two of the largest companies in the industry. Ex Libris was handed off from one private equity investor to another in what has been a long-term relay race as the company continues to increase in value. A business transition with the potential for a strategic turn in direction transpired with Innovative Interfaces as the company that distinguished itself as outside the fray of external investors dove in headlong.

As such, 2012 was a year of dramatic change for Innovative Interfaces, making a transition to private equity ownership following a long corporate history of asserting its founder ownership as a distinguishing virtue. Unlike Ex Libris, which has changed hands multiple times with its executive management team intact, new ownership has resulted in a major reconstitution of Innovative's executive management team.

From its founding in 1978, Innovative had been owned by its founders, initially jointly by Jerry Kline and Steve Silberstein for over two decades. Following a tumultuous separation battle, Kline ultimately gained full ownership of the company in 2001. Beginning in August 2010, Kline tempered his involvement in the day-to-day management of the company, naming Neil Block as president. Kline's period of exclusive ownership concluded in March 2012 with the sale

of the majority interest in the company to a pair of private equity firms, Gay Global Capital and JMI Equity.

The new ownership brought a new board of directors, with Kline as chairman. Executive management changes followed, filled primarily by individuals with experience in high-tech industries but outside the library arena. Kim Massana was appointed CEO in August 2012. Block initially took the role as chief sales officer but exited in December 2012 and has since joined Polaris. The partnership between Kline and the new investment group was short-lived. Kline stepped down from the board and sold his remaining stake in the company to Huntsman Gay and JMI in February 2013.

The new management team has already effected noticeable change. Thirty new positions were added to the company by year-end. Those that worry new investors mean dramatic cost-cutting should be reassured. Rather, the company seems set on expanding its capacity to develop and market products. An even more telling event took place on March 4, 2013, when Innovative withdrew the lawsuit against OCLC filed under the previous ownership, with its sister company SkyRiver as lead plaintiff (see NewsDesk, p. 15). Under Kline, relations with OCLC were tense at best. The new management team comes in absent this predisposition and with an eye on OCLC as a potential collaborative partner, as reflected in statements issued by Massana and OCLC CEO Jay Jordan following the announcement.

Innovative restructured SkyRiver. It will no longer operate as a separate company; its bibliographic services will continue within Innovative. Though legally a separate company, in practice SkyRiver was closely allied, leasing office in Innovative's Emeryville headquarters, contracting for software development and for technology infrastructure. Going forward, SkyRiver will operate within Innovative as part of its resource-sharing division, which also includes the INN-Reach technology. Leslie Straus, who came out of retirement as a former Innovative exec to serve as president of SkyRiver, has left the company. Bringing SkyRiver into Innovative's corporate structure, if anything, reflects its value to the new management team. As library technologies become increasingly intertwined with knowledgebases, having a bibliographic database in-house may prove to be a valuable asset.

The changes afoot at Innovative seem at this early stage to reflect a new tone and are lacking any dramatic turns in product strategies that would have a negative impact on its customers. Product lines, development strategies, and support resources remain intact.

### [Musical equity chairs](#)

Ex Libris changed ownership in October 2012 as Golden Gate Capital, a major private equity firm managing funds over \$12 billion, acquired the company from Leeds Equity Partners. Leeds gained ownership in August 2008 from Francisco Partners, which had acquired Ex Libris in June 2006. Through each of these transitions, Ex Libris has maintained its top executive team, headed by Matti Shem Tov who has served as president and CEO since May 2003.

Ex Libris has turned over its ownership more than any other company in the industry. This dynamic should be seen as a positive sign, reflecting that the company has been an attractive investment, with significant increases in valuation through each transition. All three private equity owners have apparently supported the company's business strategy, which includes a major component of research and product development, leading to products that can be monetized in the long term.

Interestingly, Golden Gate already has a library automation company in its investment portfolio. Infor Library and Information Systems came into the fold in November 2005 through the acquisition of Geac Computer Corporation. Geac was one of the pioneers of the library automation industry, having created its own proprietary automation systems in the 1970s, offered the PLUS and Advance ILS products in the 1980s, and acquired Vubis from ODIS in 1995. By the time of its acquisition by Golden Gate, the library division represented a very small portion of Geac's overall business, which had expanded primarily into the enterprise resource planning (ERP) sector. The PLUS and Advance products eventually faded away, with Vubis Smart and most recently V-smart becoming the company's flagship library automation products.

Under Golden Gate's ownership, Geac was initially folded into a portfolio company named extensity, which was soon merged into Infor, a very large IT services company with current annual revenues at \$2.8 billion. Infor Library and Information Systems represents a very small business unit within Infor. By contrast to Ex Libris's focus on research and academic libraries, Infor Library and Information Systems sells primarily to public libraries. It is yet to be seen, however, if any relationship will emerge between these two corporate cousins within the Golden Gate portfolio.

That SirsiDynix has remained with Vista Equity Partners since 2006 is almost as interesting a story as the transitions that have happened. While the term of a private equity investment can vary tremendously, it is noticeable that Ex Libris has transitioned through three deals while Vista held on to SirsiDynix. When considering that both companies have approximately the same number of customers and SirsiDynix operates with around 30 percent fewer employees, it is apparent that the company remains a very profitable asset. In contradiction to perceptions that the company is losing market share, this year SirsiDynix outsold all its competitors. With new sales increasingly outside the United States, the SirsiDynix customer base will be increasingly international.

Although the two ownership transitions stand as important events, neither -- at least not yet -- has brought any additional consolidation of the industry. Though SkyRiver was folded into Innovative, it's more of a technical reorganization than a merger since it already shared common ownership with Innovative. We should anticipate additional business transactions in the industry within the next year or so. The shape of the library automation industry remains an ongoing story.

Very large companies continue to dominate. This year Ex Libris steps to the front, just ahead of SirsiDynix, as largest by all measures: number of customer installations, personnel employed, and estimated revenue. The number of libraries contracting for Aleph, Voyager, and Alma now total 3,729; many additional libraries run products such as Primo, SFX, or Rosetta outside of that group. This number now tops the 3,616 sites running Symphony and Horizon, with a dwindling number remaining on Dynix.

Innovative and Follett Software Company tie for third largest in terms of personnel. The number of libraries served is not really comparable between the school sector and that of the public and academics.

### [Library services platforms take shape](#)

The emergence of a new genre of library services platforms that comprehensively manage library resources across all formats, based on service-oriented architecture with web-based interfaces designed for deployment through SaaS, stands to reshape the industry over the next decade. This

transition, however, remains in its early phase, with development complete only on some of the new products. Yet the sales cycle has begun, and early successes in the short term can amplify long-term prospects.

OCLC was first out in this category with its WorldShare platform developed as the basis of its strategic library management applications such as WorldShare Management Services, replacing the functionality of a traditional ILS, WorldCat License Manager for the management of electronic resources, and WorldShare Metadata Services. Initially announced in 2009, WorldShare Management Services entered general release in December 2011. By year-end 2012, a total of 163 libraries had signed contracts for WorldShare Management Services, with 73 in production.

OCLC has expanded the data centers supporting the WorldShare platform. In addition to the original two data centers in Ohio, new facilities were activated in London in 2011; data centers in Sydney, Australia, and Toronto went online in 2012.

Innovative Interfaces was also out early with its library services platform Sierra, which has been on the fast track from announcement, development, deployment, and now in the sales cycle full-force. Sierra packaged the functionality of Millennium and electronic resource management into a new technology platform built out of a services-oriented architecture and APIs, with a new set of unified clients. Only a year after Sierra's initial announcement in April 2011 Hillsdale College, MI, became the first to place it into production. Libraries have responded quite positively to Sierra, with 206 contracts made in 2011 and another 117 in 2012. The vast majority represent migrations from Millennium, though 14 this year were from new name customers.

Since 2009, Ex Libris has been working on creating the Alma library services platform with broad functionality that would provide a forward migration path for many of its long-standing ILS and related products as well as attract new libraries into its customer base. Ex Libris built Alma anew without recycling major components from its legacy products. This approach afforded the ability to take advantage of current technology architectures and a fresh view of workflows and functionality for academic and research libraries. In 2012, we saw the completion of the initial release of Alma and its first production use at Boston College in July. The 17 contracts made for Alma last year bring the total number of libraries selecting Alma to 126. By early 2013, nine institutions were using Alma in production.

One of the key activities for Serials Solutions in 2012 involved the ongoing development of Intota. Serials Solutions employs a strategy of using knowledgebases as the foundation of its technology products. KnowledgeWorks, the company's strategic knowledgebase for e-content holdings, forms the structure for its products related to the management and access of electronic resources such as 360 Core, 360 Link, and 360 Resource Manager. Intota will follow a similar approach but across a broader range of resource types. To support Intota, Serials Solutions is building a new knowledgebase comprised of KnowledgeWorks, MARC records from a variety of sources, holdings data supplied by vendors that supply resources to libraries, Ulrich's, and others. The initial module, Intota Assessment, planned for release in 2013, will provide a set of collection analysis tools including both books and serials designed to help libraries in collection development.

In 2012, VTLS focused much of its development efforts on the creation of Open Skies, its new library services platform. Encompassing the traditional library automation functionality of Virtua and the digital asset management features of VITAL, Open Skies embraces the key characteristic

of providing a unified platform for libraries to manage the forms of content that comprise their collections. Open Skies will be based on a new architecture and will carry forward the functionality of its earlier products, including the Virtua ILS and the VITAL digital asset management platform. The design of Open Skies was established in early 2012, with development proceeding since that time toward the goal of releasing functional modules beginning in 2013. VTLS began the rollout of Open Skies with MozGo, a mobile app based on the new architecture and technical platform. As the development of Open Skies comes to completion, it will supersede its legacy Virtua and VITAL products, which will be able to migrate to the new platform without significant disruption.

In addition to these commercial efforts to create library services platforms, the Kuali OLE project continues to work toward an open source alternative for academic and research libraries. In 2012, Kuali OLE and JISC in the UK collaborated to launch a related project, the Global Open Knowledge Base, to develop an open access knowledgebase of e-resource holdings delivered through an open source platform. It builds on the KnowledgeBase+ under way in the UK to develop a shared knowledgebase that covers the content specific to the common subscriptions of UK institutions. GoKB also received funding from the Andrew W. Mellon Foundation, with North Carolina State University serving as the lead institution. This project provides the supporting infrastructure needed by Kuali OLE for the management of electronic resources.

The two-year build phase of the Kuali OLE initiated in 2010 has been extended to a third year, thanks to a \$750,000 Mellon grant. The initial 1.0 release of Kuali OLE is now expected at the end of 2013, with at least two of the partner libraries, Lehigh University, PA, and the University of Chicago, on track for early implementation.

### [The future of the ILS](#)

Despite the attention gained by the new library services platforms, it seems clear that the ILS will persist, though in ever evolving forms, as a parallel thread in the industry. The library services platforms appeal especially to those libraries, such as academic and research libraries, that have increasingly complex collections of print, electronic, and digital components that demand a unified platform for management and access. Other libraries are drawn to massive collaboration and find products such as WorldShare Management Services compelling.

There remains a large number of libraries that continue to find the basic model of the ILS well suited to their needs. Public libraries, for example, continue to be vigorously involved with the circulation of their print collections. The ILS designed to manage print collections efficiently continues to be well used in these libraries. The rub comes with the near explosive impact of ebook lending on public libraries.

For at least some public libraries with increasing involvement of ebooks and other new services, the most promising development seems to be in the direction of extending an existing ILS rather than shifting to an entirely new genre of software. A new phase of evolution can be seen in the initiatives to integrated ebook discovery and lending into the online catalogs of ILS or discovery services.

Polaris partnered with 3M Library Systems to integrate the 3M Cloud Library ebook lending service directly into its PowerPAC online catalog interface. The Baltimore County Public Library became the first to implement this integrated ebook lending service in December 2012.

Polaris also completed a Community Profiles module, which allows community organizations to manage their own profile, including calendars and events. Through a tool called Feature It, related content items from Community Profiles can appear among search results in PowerPAC. A ContentXChange utility allows community organizations to display a carousel of selected book images on their own website, which then link back to the library's site when selected. Polaris also introduced its Social PAC in early 2013 that integrates social features from ChiliFresh into the Polaris PowerPAC, available to libraries using Polaris that also subscribe to the ChiliFresh Connections service.

### [Transformation under way](#)

SirsiDynix launched another set of initiatives to transform its ILS products, including work to create web-based staff interfaces and layering in a new platform for managing e-content. The SirsiDynix BLUE Cloud Client Suite will provide web-based interfaces for staff functions, compatible with either Symphony or Horizon. Cataloging functionality will be delivered as the first BLUE Cloud Client, with circulation, acquisitions, and serials to follow. Specific release dates were not provided. eResource Central, planned for release in the first quarter of 2013, will provide a platform for the staff management and patron access of ebooks and other e-resources. The company has made agreements with multiple partners to integrate content into eResource Central, including ebook providers such as OverDrive, 3M Cloud Library, Recorded Books, Baker & Taylor Axis 360, Oxford University Press, and with EBSCO Publishing for integration of ebooks and electronic databases through the EBSCO Discovery Service. SirsiDynix reports over 80 libraries contracting for eResource Central prior to its release.

The Library Corporation (TLC) is working to transform its ILS products, replacing its Windows-based client software with browser-based interfaces. The new web-based interfaces offer new features and can be used on tablet computers. Staff members can use the new "List & Actions" feature to view lists of materials on a tablet that need to be retrieved from the stacks, avoiding wasteful printing. More than 60 of its libraries have already migrated to these new web interfaces.

Auto-Graphics also completed a major development project to transition VERSO and its other products from interfaces based on Adobe Flex to HTML5. This new platform eliminates the need to support Adobe Flash, which has become increasingly problematic owing to its lack of support on mobile devices manufactured by Apple.

Developments such as those executed by Polaris, TLC and SirsiDynix demonstrate that the ILS can be evolved and extended to meet the needs of public libraries, even when challenged by new dynamics such as demand for ebook lending and social interactions. Each of these projects includes a transition to web-based interfaces and integration of external services through application programming interfaces (APIs), key characteristics of the library services platforms. While library services platforms and ILSes may travel as separate threads in the industry, it also seems that there will be many aspects of commonality, and the result of these two product development strategies may end up remarkably similar in the long-term.

### [Discovery and portals](#)

Discovery services continue to represent a major component of the industry. Web-scale, or index-based, discovery services now are must-have products for libraries with large collections of electronic resources. Summon, EBSCO Discovery Service, Primo Central, and WorldCat Local each take a distinctive tack in how they populate their index, order result sets, and in how

they link to or display full-text content. Participation by content providers in these discovery services continues to grow but remains uneven. Those interested in improving the ecosystem among discovery service creators, content providers, and libraries might tap into the work of the Open Discovery Initiative (disclaimer: Marshall Breeding is cochair).

### [Sales leaders](#)

OCLC topped the sales chart in 2012 with 163 contracts made for WorldShare Management Services. No statistics were provided for possible new sales of its acquired ILS products. With very large numbers of libraries already using OCLC's services in other areas, it has a pipeline in place for marketing its WorldShare Platform.

Innovative Interfaces continues its very strong sales push for Sierra with 117 new contracts, 14 of which were new name sales, and another 30 for Millennium, all of which were new customers. While not a record-breaking performance as was the case last year, these numbers demonstrate the readiness of the company's existing customer base to move to its new system, as well as interest beyond its existing customer base. Some libraries, however, are following a cautious approach of engaging with Innovative initially with Millennium, with later plans to adopt Sierra.

SirsiDynix had a very strong year in sales, signing 104 contracts for Symphony, 89 of which were to new clients. Seventeen contracts went to libraries in the United States, including libraries joining existing projects such as the Montana Shared Catalog, the Southeastern Ohio Regional Library, and the Louisiana Library Network as well as new consortia such as the Houston Area Library Automated Network, which will be migrating from a Millennium ILS. The majority of the new sales came from outside the United States, including 35 libraries moving to Symphony as part of the South Australia Library Network and three joining the Kotui network in New Zealand. Three new sales came from South America and four from Saudi Arabia. Other countries represented in Symphony sales include United Arab Emirates, Iraq, Turkey, Jordan, Morocco, Libya, Oman, South Africa, and Kenya. Arabian Advanced Systems represents SirsiDynix in the Middle East region.

SirsiDynix's sales in 2012 help reinforce the impact of the trend toward larger, even statewide or nationwide, ILS implementations. Companies able to capture these large contracts will reap high rewards, at the expense of their competitors. These winner-takes-all projects have the potential for a large number of turnovers, even from very well-regarded systems.

In 2012, Polaris signed 30 contracts representing 701 new libraries. Even though the number of contracts is down from the previous year, the number of libraries represented is higher. One of the contracts delivered in 2012 was to the Illinois Heartland Library System, the largest consortium in the United States, which selected Polaris to automate over 450 of its member libraries with combined collections of more than ten million items. This consortium was created through the amalgamation of four regional library systems, each operating its own shared ILS.

### [The open source scene](#)

Open source ILS products, including Evergreen and Koha, continue to represent a significant portion of industry activity. Of the 794 contracts reported in the public and academic arena, 113, or 14 percent, were for support services for these open source systems. A growing number of projects involve regional or statewide projects based on an open source ILS. These include NCCardinal in North Carolina, the SPARK catalog in Pennsylvania, three regional libraries in Massachusetts, and SCLENDS in South Carolina. Evergreen has proven itself to be an effective

platform for large numbers of small libraries to pool their efforts and resources, often with savings relative to high-end proprietary systems.

This was also a year where some libraries moved away from open source ILS products to proprietary versions. In the small library arena, Biblionix migrated several libraries running Koha to its hosted Apollo ILS. The Geauga County Public Library, OH, contracted with Innovative to move from a Koha ILS to Sierra. Book Systems reported that among its new customers are libraries using open source ILS but did not list the specific institutions.

As libraries move in and out of open source systems, the effectiveness of the software and the quality of support are paramount. The idea of open source resonates with most libraries, but practical concerns trump philosophical preference. With open source now considered a routine option, these systems will prosper only to the extent that they are well supported and deliver on efficiency and innovation.

### [Company Profiles](#)

Auto-Graphics, Inc

Ontario, CA; 800-776-6939

[www.auto-graphics.com](http://www.auto-graphics.com)

Auto-Graphics specializes in library automation and resource-sharing products, primarily for public libraries in the United States and Canada. The company operates as a business unit of Agent Information Software (AIS), a small publicly traded company that also owns Agent Legal.

COMPANY NEWS This year the company simplified the branding of its product suite: SHAREit for its interlibrary loan (ILL) platform, SEARCHit federated search tool, and VERSO integrated library system (ILS).

Likewise, Auto-Graphics found new clients for both its large-scale resource-sharing platform and for the VERSO ILS. The Massachusetts Virtual Catalog selected SHAREit for its statewide ILL platform, replacing one of the last remaining SirsiDynix URSA implementations. New Jersey renewed its contract with Auto-Graphics to provide the infrastructure for the JerseyCat ILL service. The VERSO ILS, which in previous years saw adoption primarily at small public libraries, was selected by several consortia, including the Library Management Network in Alabama, replacing a Millennium ILS, and by the Central Utah Collaborative ILS Project. These deals reflect progress in positioning VERSO as a system capable of serving larger automation scenarios.

The company reports revenues in the \$5 million -- \$10 million range, with 88 percent from libraries in the United States.

BiblioCommons

Toronto, Ont; 647-436-6381

[www.bibliocommons.com/](http://www.bibliocommons.com/)

BiblioCommons offers the BiblioCore socially oriented patron discovery and portal interface for public libraries. The service is deployed through multitenant software-as-a-service (SaaS), so participating libraries are able to share a common interface, with accommodation for local configuration options. The design of the system allows patrons across all participating libraries to

interact, sharing reading lists and other social activities surrounding their interests in reading and literature.

BiblioCore operates with most of the major ILS products, including Millennium, Sierra, Horizon, Symphony, and Evergreen; connectors for Polaris and VTLS were completed in 2012. Support for TLC Carl.X is under way.

COMPANY NEWS Some of the largest and most prestigious libraries in the United States, Canada, and New Zealand subscribe to BiblioCommons. Libraries adopting BiblioCommons in 2012 include the public library systems in Brooklyn, Chicago, Omaha, Salt Lake City, and Tulsa and Austin, TX, Santa Monica, CA, Multnomah County, OR, and the Central Rappahannock Regional Library, VA.

BiblioCommons channeled much of its development efforts in 2012 toward integration of ebook discovery and lending. New York Public Library (NYPL), Boston Public Library, and Seattle Public Library teamed with BiblioCommons and OverDrive to integrate fully ebook discovery, checkout, and downloading within BiblioCommons, allowing patrons to bypass the ebook supplier's interface. A subsequent project at NYPL provided similar integration for the 3M Cloud Library, allowing the library to provide titles from multiple vendors.

The BiblioSchools project unites the catalogs of the public and school library systems of New York City, enabling access to a vast body of material to students. The project involves the separate Millennium installations of Brooklyn PL and NYPL, the Virtua ILS used in the Queens Library, and the Destiny ILS used by the New York Public School System.

Through a partnership with the Chicago Public Library Foundation, BiblioCommons will extend the BiblioCore technology beyond discovery and related patron interactions into all aspects of the library's website. Content management capabilities were available previously and have been used by some smaller libraries to manage their website. This project will extend that basic capability into the much more sophisticated and complex realm of the virtual presence of a large municipal library.

A new program, Summer Sites, which supports summer reading programs, advanced into production from a test phase initiated last year. The company reported that it made many improvements to the infrastructure and functionality of BiblioCore in 2012, including a redesign of the presentation of facets in the search interface, saved searches, and advanced treatment of queries involving numbers.

Other enhancements involved support for previously problematic patron services, such as handling expired or canceled holds for libraries using Symphony, and new features related to the administrative console for library staff.

Biblionix

Austin, TX; 877-800-5625

[www.biblionix.com](http://www.biblionix.com)

Biblionix, a small privately owned Texas-based company, developed the Apollo ILS specifically for small to medium-sized public libraries. A strategic focus on this market segment, avoiding the more complex features and requirements of larger city or county library systems, has resulted in a steadily growing client base, with no defections to competing products. Biblionix has drawn

its clients from libraries using a wide variety of incumbent proprietary and open source ILS products.

Apollo has been deployed through multitenant SaaS, with all staff and public interfaces fully web based. This architecture avoids local installation of any software components, which has proven to be highly desirable in the small library arena and enables a very small company to support a large number of customers with very high levels of satisfaction.

COMPANY NEWS Enhancements to Apollo fulfilled in 2012 include a mobile catalog with the feel of an app, though delivered as a mobile website.

This Apollo-To-Go mobile catalog was made available without additional costs. Other developments include discovery of OverDrive ebook titles in the catalog, support for the new SIP version 3 protocol in addition to existing SIP2, and ILL integration.

The 80 new Apollo subscriptions made in 2012 bring the total number of installations to 352.

ByWater Solutions

West Haven, CT; 888-900-8944

[bywatersolutions.com](http://bywatersolutions.com)

ByWater Solutions provides services surrounding the open source Koha ILS. The company assists libraries in migrating from their incumbent system to Koha and in providing ongoing support and optionally hosting the installation. ByWater participates in the global Koha support and development community that collaborates via the [koha-community.org](http://koha-community.org) domain.

COMPANY NEWS In September 2012, ByWater began offering a hosting platform in Canada in addition to those in the United States. The company employs 13 FTE, steady since last year, but more than three times the size of the company in 2009. During that same interval, the number of Koha installations supported has grown from seven to 554.

Capita

Birmingham, West Midlands, UK

+44 (0)870 400 5000

[www.capita-libraries.co.uk](http://www.capita-libraries.co.uk)

Based in the UK, Capita is a large software and outsourcing firm offering a variety of technology services to local government services and academic institutions throughout the country. In 2010, Capita acquired the library automation business of Talis, including the Alto ILS and the Prism discovery service. Capita reports that around 75 percent of the local government authorities in the UK rely on its software products and that it has a substantial presence in UK higher and further education institutions. The company does not do business in the United States.

COMPANY NEWS Capita notes that by 2012, 97 percent of its library sites had implemented its Prism discovery environment offered as a hosted service, based on the Talis Platform. The original arrangement involved Talis continuing to provide the infrastructure hosting for Prism, at least for an interim period. In 2012, Talis withdrew from its Semantic Web activities. In early 2013, Capita will move Prism to its own hosting infrastructure. Capita indicates that the growth in personnel allocated to its library-related activities to 49 from 43 reported last year reflects the additional resources now involved with this transition. Capita has extended the types of content discoverable through Prism to include institutional repositories, archival records, or image

collections. A partnership was formed with EBSCO Publishing to integrate EBSCO Discovery Service through Prism for mutually subscribing libraries.

Other product developments completed include e-commerce support in Prism for accepting payments for fines and fees, a recommendation service to suggest related content items, and a mobile interface. The company began offering the Alto ILS functionality as a hosted service branded as Chorus. For libraries wanting to house its ILS servers locally, the new Assist Managed Service provides comprehensive operational support and maintenance. Capita also plans to strengthen its shared services offering where multiple library organizations implement its ILS in a consortial model.

In 2012, the number of Alto installations fell from 110 reported last year to 99 and down considerably from the 203 reported by Talis in 2006. Capita reported no new sales of Alto this year.

Civica Pty Limited

Melbourne, Victoria, Australia

+61 3 8676 4400

[www.civica.com.au](http://www.civica.com.au)

Civica Library and Learning is a division of a global IT services company with a small presence among libraries in the United States but is a major competitor for libraries in the UK, Australia, and Asia. In addition to its ILS and other software products, the company offers outsourcing services for libraries, including the school libraries under the Ministry of Education in Singapore. The personnel involved in these outsourcing services make the 425 FTE reported by Civica not necessarily comparable to other companies. Though local installations continue to be offered, an increasing number of Civica's clients opt for Spydus as a hosted service, now accounting for 59 percent of its library installations.

COMPANY NEWS Civica continues to expand its presence in the UK public library arena with ten new sales this year. A new consortium, Shared Partnership in the East, was established using Spydus, including the library services of Cambridgeshire and Suffolk and the Association of Greater Manchester Authorities, with initial participation by the library services in Oldham, Rochdale, Salford, Stockport, and Trafford. In the Asia Pacific area, new contracts were made in Australia, Singapore, and Brunei.

Sorcer, the patron interface portal introduced in 2009, saw three new sales, including the Ministry of Education in Singapore for its 354 schools. The company made two sales of its Blis electronic resource management (ERM) system, now in 15 libraries.

EBSCO Publishing

Ipswich, MA; 800-653-2726

[www.ebscohost.com](http://www.ebscohost.com)

EBSCO Publishing, a subsidiary of EBSCO Industries, operates strategically as a provider of research databases and other content products to libraries. The company also offers technology products, including the EBSCO Discovery Service (EDS) and ERM Essentials and other ERM utilities offered through EBSCO Information Services. Building on the EBSCOhost platform, EDS indexes a vast amount of content from over 20,000 journal publishers and 70,000 book

publishers. The company reports that EDS has been selected by over 2,100 libraries since its introduction in 2009 but did not report specific sales statistics for 2012.

COMPANY NEWS Unlike archival ProQuest, which opted to build its own resource management system, Intota, EBSCO stayed out of the library automation arena and instead is pursuing a strategy of partnerships with ILS and discovery service providers. Partnerships formed to date include those with SirsiDynix for integration of EDS into eResource Central, Innovative Interfaces for Encore, OCLC to allow EDS to operate as a front-end interface for WorldShare Management Services, Capita for integration into Prism, Softlink for Oliver and Liberty, and several other companies in other international regions. A set of application programming interfaces (APIs) released in June 2012 provide the technical basis for integrating EDS into other online catalogs or discovery services.

Within the same broader corporate family, EBSCO Publishing operates EBSCOhost as a platform for publishing content products and for EDS, and EBSCO Information maintains EBSCONET for its subscription management services. This year saw EBSCO A-to-Z and the LinkSource knowledgebase migrate from EBSCONET to the EBSCOhost platform. ERM Essentials remains on EBSCONET.

Equinox Software

Duluth, GA; 877-673-6457

esilibrary.com

Equinox Software specializes in services surrounding open source library automation products. The vast majority (417) of its support contracts surround the Evergreen ILS, with 20 related to Koha. In the open source arena, many different firms can offer services related to any given software product. Equinox has become established as the dominant provider of services for Evergreen. The company traces its roots to the original team that built the software for the PINES service of the Georgia Public Library System.

COMPANY NEWS In 2012, Equinox completed the development for the initial version of an open source resource sharing environment called FulFILLment. In conjunction with a broader development community, Equinox was involved in the ongoing enhancement of Evergreen, with version 2.3 published in 2012. The company offers software development services for organizations that wish to contract for the creation of specific features or modifications to the software. The company is also involved in ongoing development of the software beyond contracted development projects.

Equinox reports revenue in the \$2.4 million -- \$5 million range, all of which is derived from contracted services since the open source arena in which it operates does not charge for the software itself as is the case with those involved in proprietary products. The 20 FTE personnel employed this year are down one position from that reported last year. Manager of implementation Galen Charlton was chosen as an LJ 2013 Mover & Shaker for his work with open source code. Equinox Library Services Canada was established as a subsidiary to support Canadian clients, including a data center in Toronto for hosting services.

Ex Libris Group

Jerusalem, Israel; 972-2-6499100;

Des Plaines, IL 60018; 847-296-2200

[www.exlibrisgroup.com](http://www.exlibrisgroup.com)

The global company Ex Libris Group, based in Israel and with offices and distributors in many regions, provides a wide range of technology products designed primarily for academic and research libraries. The company does business in 82 countries, with over 5,300 institutions worldwide using at least one of its products. This year its customer base expanded by 110 libraries. With a product line that range from relatively low-cost utilities such as SFX to strategic library management platforms, Ex Libris has a variety of products and services to reach into its target market.

COMPANY NEWS Ex Libris ranks as the largest company in the industry as measured by the number of personnel employed, estimated revenue, and number of libraries served. The company has grown steadily from the 206 FTE reported in 2002 to 522 for 2012; ten were added since last year. The company also devotes a high portion of its personnel to development, with 189 FTE, or 36 percent of its workforce. Its development team continues to stand as the largest in the industry.

Ex Libris changed ownership as Golden Gate Equity acquired the company from Leeds Equity Partners as detailed above.

Despite the resources devoted to Alma, Ex Libris continues to develop and support its two ILSes. Six new libraries selected Voyager and 26 opted for Aleph, including the national libraries of Russia and Tajikistan. Both Voyager and Aleph each support a very substantial customer base including some of the largest and most prestigious libraries in the world and continue to represent more than sufficient revenues to support their ongoing development and support. Many of these libraries have very long planning cycles and often need to wait for fully mature products when they change. Any wavering in commitment to its legacy ILS products could subvert many libraries' longer term interest in Alma.

Throughout most of its corporate history, Ex Libris has demonstrated a business strategy based on a very active R&D program to create new products and even new genres of software. Earlier examples include the SFX linking technology it commercialized in 2000, which launched the category of OpenURL link resolvers. Despite new competition, especially from Serials Solutions 360 Link, Ex Libris continues to maintain a lead in this arena. More recent innovations include the bX recommender technology that mines data from link resolver logs to determine associations among scholarly resources and the Rosetta digital asset management and preservation platform. New services offered based on the bX technology include a Journal Popularity Report and a Most Popular Articles List and the bX Hot Articles service, all of which make researchers aware of important research within their area of interest. With the four new libraries selecting Rosetta this year, the total installations now stands at 17.

Ex Libris launched its Primo discovery interface in 2006 and Primo Central in 2009. In 2012 the company released version 4.0 of Primo, including enhancements such as ScholarRank, which calculates relevancy of search results using a variety of factors to order results according to the scholarly importance and the disciplines of interest of the patron issuing the query. This year 101 new libraries selected Primo, bringing the total installations to 1,151. Ex Libris continues to expand the content indexed in Primo Central, focusing recently on content from international publishers. Primo Central has expanded access to institutional repositories as well as indexing open access content from commercial publishers so that they are discoverable by nonsubscribing libraries.

Follett Software Company

McHenry, IL; 815-344-8700

[www.follettsoftware.com](http://www.follettsoftware.com)

Follett Software Company (FSC) is part of the Follett School and Library Group (FSLG), a division of Follett Corporation. FSLG provides a variety of products and services for K-12 schools that support many aspects of a school district and that further student learning and achievement. FSC offers the Destiny family of software products to support the print and digital collections of libraries, manage textbook inventories, and related activities. Versions of the software are offered for individual school libraries as well as for centrally managed districts.

Although developed specifically for K-12 schools, Follett's library automation products, including its legacy products as well as Destiny, find use in small public libraries. In some cases the installation is shared in a partnership between the schools and public library in a city or county. In other cases these small public libraries purchase Follett's products because they are less expensive than some of those designed for larger public libraries.

COMPANY NEWS Among its many business activities, Follett Corporation operates as a major distributor of books to the K-12 schools market, including ebooks. As an example of the increasing synergies among the company's content and technology products, recent enhancements to Destiny include full integration of Follett ebooks.

The company produced two releases of Destiny in 2012. Version 10.1 included integration with TitleWave, a collection development tool developed by sister company Follett Library Resources. This release also integrates with Aspen, the student information system offered by FSC. Destiny 10.5 released in September 2012 delivered new capabilities related to ebooks, including the FollettShelf, a cloud-based virtual shelf for storing the ebooks available to the student, and the Follett Digital Reader, an ereader for personal computers and mobile devices.

FSC continues to expand the breadth of the Aspen student information system it acquired in 2010, adding functionality to provide a complete learning platform, to support special education, curriculum management, and instructional resources. Aspen has been adopted in 122 districts encompassing over 1,500 schools.

FSC ranks as one of the largest companies in the industry, with 341 personnel reported in 2012, down somewhat from the 365 reported last year.

There were 992 sales reported for Destiny Library Manager for Schools, bringing the total installations to 4,830; the new 5,428 sales of Destiny Library Manager for Districts bring the installed total to 48,438. FSC also reports that its Destiny Textbook Manager has been implemented in 1,300 districts representing 17,000 schools and Destiny Asset Manager is used in 330 districts including 3,100 schools.

Legacy product installations remain significant: 4,078 for Circulation Plus, 1,128 for Winnebago Spectrum, 1,065 for Athena, and 1,069 for InfoCentre. Given that these products have not been developed for more than ten years, we can expect the numbers to continue to dwindle. That they remain at all at this point reflects the reality that many small libraries have very minimal resources and that these products, even though outdated, continue to function adequately.

Infor Library & Information Solutions

Framingham, MA; 800-825-2574

[www.vubis-smart.com](http://www.vubis-smart.com)

Infor Library & Information Systems operates as a business unit of the Infor software and services company. Its key library automation products include the web-based ILS V-smart; Iguana, a comprehensive discovery and library portal interface; and V-insight, a tool for generating and analyzing statistics related to library collections and use patterns. Infor continues to support Vubis Smart, the predecessor of V-smart built into the client/server architecture.

COMPANY NEWS Though a major competitor in the public library market of Benelux, with a growing number of customers in Canada, the company does not have a strong presence in the United States. Even though Infor traces its corporate roots through Geac, which was once one of the major vendors of library automation in the United States, the company's current products have not taken root.

A mid-sized company, Infor employs a workforce of 71, unchanged from last year. Infor reported 23 contracts for V-Smart in 2012 for a total of 167 installations; 124 libraries continue using Vubis Smart.

Innovative Interfaces, Inc.

Emeryville, CA; 510-655-6200

iii.com

Although led by a new executive team, management at the VP level remained largely intact and in the rank and file of the company, preserving the domain knowledge and experience. Although it's somewhat early to discern the new strategies, early signs seem positive with a net increase of personnel to 341 FTE, up 30 from the 311 reported for 2011.

COMPANY NEWS The new ownership of Innovative comes at the point when Sierra, the company's new generation flagship product, has been completed and entered a very successful early sales cycle. We noted the record-breaking 206 sales of Sierra in last year's Automation Marketplace report. In 2012, Innovative signed an additional 117 contracts for Sierra, 14 of which were to new name customer libraries. Innovative continues to win new contracts for Millennium, with 30 of these signed in 2012, all to new name clients. The installed base of Millennium peaked in 2011 at 1,424; 2012 saw the beginning of the decline of Millennium, decreasing to 1,330. Most of the libraries moving away from Millennium have gone to Sierra, though there has been some erosion to competing products, including the open source Evergreen ILS.

LibLime

(a division of PTFS, Inc.)

North Bethesda, MD; 301-654-8088

[www.liblime.com](http://www.liblime.com)

LibLime provides services surrounding LibLime Koha and LibLime Academic Koha, both variants of the open source Koha ILS. The company generally does not collaborate closely with the global community associated with koha-community.org but rather provides its communication through the koha.org domain as well as its own liblime.com website.

COMPANY NEWS The company delivered multiple software releases in 2012. LibLime has extended its versions of the Perl-based Koha to operate in the Plack environment. Perl, as an

interpreted language intended more for utility functions and web programming than for transactional business applications, launches a new instance of itself with each page request, adding considerable system overhead when under a high transaction load. Plack maintains a single instance of Perl, which can significantly improve performance. LibLime has also added support for SOLR search technology, which offers faster performance and more sophisticated features than the Zebra search engine, which was integrated into Koha since about 2006. BibLibre, a French company associated with koha-community.org, has also integrated Plack and SOLR into Koha for the last two years.

In addition to these architectural changes, LibLime has added a variety of functional enhancements to the software. It has added new authority control capabilities, including the dynamic creation of authority records, as well as support for RDA (resource description and access) and many other individual feature enhancements.

LibLime reported five service contracts for LibLime Academic Koha in 2012, bringing the total number of libraries using that version to 130; 37 new libraries contracted for LibLime Koha, bringing the total libraries to 550. LibLime also reported that four libraries contracted for Koha with PTFS Europe, which is partially owned by PTFS, operates primarily in the UK, and supports Koha as developed through the koha-community.org group rather than LibLime's versions.

Since there is no substantial coordination between LibLime and the Koha-community.org developers, substantial overlap and duplication of efforts occur among the development of the Koha variants involved.

PTFS reports that 155 are employed by the company overall but around 40 are associated with LibLime and the development and support of LibLime Koha.

The Library Corporation

Inwood, WV; 304-229-0100

[www.TLCdelivers.com](http://www.TLCdelivers.com)

The Library Corporation (TLC) focuses on library automation products primarily for public and K-12 school libraries. Its strategic products include the Library.Solution ILS and Carl.X for large municipal libraries and consortia. Founded in 1974, the company remains under the private ownership of its cofounder.

COMPANY NEWS The company reported 199 FTE personnel, steady since last year. TLC opened a new office in New York City centered on user experience design for its patron and staff interfaces with regard to all its products and other development tasks.

The company launched a new service, called eBiblioFile, to provide libraries with customized MARC records as they order ebook titles from OverDrive or 3M Cloud Library with a quick turnaround of 48 hours. This record delivery service, which has already attracted 173 subscribers, is available to any library regardless of the ILS or discovery service used. eBiblioFile builds on the bibliographic services that TLC has offered for many years. TLC has also enhanced its patron interfaces to integrate ebook availability status and other features for libraries that subscribe to OverDrive.

In 2012, TLC saw a drop in new sales of Library.Solution from the 48 reported last year to 13, though it reported signing 182 multiyear agreements with continuing customers that are not

reflected in the sales statistics. The installed base for Library.Solution stands at 768, with 15 sites on Carl.X and five remaining on the legacy Carl.Solution ILS.

Mandarin Library Automation, Inc.

Boca Raton, FL; 800-426-7477, x751

[www.mlasolutions.com](http://www.mlasolutions.com)

Mandarin Library Automation through its many years in operation has offered a series of library automation products, including the original Mandarin, then Mandarin M3, and Mandarin Oasis. Both Mandarin M3 and Oasis are currently supported, and Oasis is also available as a hosted service. The company's products are used mostly in school libraries and other types of small to medium-sized libraries.

COMPANY NEWS The company has recently introduced Mandarin CMS, a new fully hosted service that functions not only as a library automation system but also as the library's complete website. In addition to traditional ILS functionality, Mandarin CMS offers the ability to manage and present lists of most popular titles, suggested reading lists for classes, school or library events, current news, art galleries, and other components that would typically appear on a school or small library website. Migration from existing Mandarin products to Mandarin CMS is available without cost, though a small hosting fee will be charged in addition to the standard annual maintenance.

In 2012, the company also completed Version 2.7 of Oasis and the M3/WebOPAC, with new features including the ability to search by reading level.

The company reported 176 new sales of Oasis and 47 for Mandarin M3 in 2012.

OCLC

Dublin, OH; 614-764-6000

[www.oclc.org](http://www.oclc.org)

OCLC, a large nonprofit membership organization, is involved with a very wide range of activities related to libraries worldwide, including an increasing involvement in the realm of library automation. Aspects of OCLC of specific interest would include the products and services that overlap with the companies in the library automation industry. These would include traditional ILS products acquired through business acquisitions, WorldCat Local and other patron-facing discovery and portal products, resource-sharing technology products, the CONTENTdm digital asset management system, EZProxy, its digital preservation services, and the WorldShare Platform. Many of the initiatives that come out of OCLC Research relate to the library automation industry, especially its recent work concerning Linked Data.

COMPANY NEWS OCLC reports that 5,035 libraries, primarily outside the United States, use one of its ILS products, including Amlib, SunRise, Bibliotheca, OLIB, LBS, CBS, and TouchPoint.

The \$203.5 million in revenues generated by OCLC in 2012 is more than double that of the largest companies in the library automation industry. We estimate \$57 million is derived from products and services within scope.

Polaris Library Systems

Syracuse, NY; 800-272-3414

[www.polarislibrary.com](http://www.polarislibrary.com)

Polaris Library Systems focuses primarily on providing library automation to public libraries, though in recent years it has also begun to attract customers in academic libraries. The company has built momentum in recent years, capturing a major portion of the municipal libraries and other major public library systems that come to market. Though still a relatively small company, Polaris has become a major force in the public library arena.

COMPANY NEWS In order to maintain high levels of satisfaction, Polaris works to ensure that its customer libraries are using the latest versions of the software. Polaris 4.1 was delivered in May 2012. By the end of 2012, the company reported that 95 percent of its customer sites were on version 4.0 or higher.

Polaris grew its workforce from 86 reported last year to 93 FTE reported this year, stating its need to keep up with its growing customer base and product innovations.

Serials Solutions

Seattle, WA; 206-336-7691

[www.serialsolutions.com](http://www.serialsolutions.com)

Serials Solutions, a subsidiary of ProQuest, offers a variety of products that support the discovery and management of library resources. For most of its corporate history, Serials Solutions has specialized in technologies related to electronic resources but more recently has begun development on Intota, a library services platform for the management of the components of library collections.

COMPANY NEWS The company continues to make advances with its Summon web-scale discovery service, both in terms of product development and customer sales. In 2012, 158 new libraries subscribed to Summon, bringing the total number of subscription to 504. New capabilities added to Summon this year include Discipline Scoped Search, which allows libraries to plant search widgets on academic course pages, subject guides, or other resources that retrieve results appropriate for the context, and Summon Suggestions, which highlights appropriate resources that a patron might want to consult based on trigger words in a search query. Full-text searching of ebrary ebook titles was added to Summon as well.

Serials Solutions has responsibility for the AquaBrowser discovery interface, used especially by public libraries, initially developed by MediaLab Solutions based in Amsterdam and acquired by ProQuest through its Bowker subsidiary. This year the Dutch National Library signed a \$2.5 million contract to continue to use AquaBrowser in the public libraries in Denmark through 2015.

Serials Solutions expanded the number of libraries using 360 Link by 148, for a total of 1,113.

Executive management changes made in 2012 include the appointment of Kevin Stehr as VP Global Sales, and Pam Cory as VP Marketing and Global Market Development.

Serials Solutions expanded its workforce by 19 positions from the 237 reported last year to 256 at the end of 2012. The growth in personnel allocated to development was even more dramatic, increasing from 80 to 131, reflecting the resources devoted to the development of Intota in addition to its established products.

SirsiDynix

Lehi, UT; 800-288-8020

[www.sirsidynix.com](http://www.sirsidynix.com)

SirsiDynix ranks as one of the largest companies in the industry, about third in size by number employed and second in terms of libraries served. The company has been under the ownership of private equity firm Vista Equity Partners since December 2006, a six-year involvement, considerably longer than other investment relationships in the industry.

The company offers two flagship ILS products, Symphony and Horizon, as well as a variety of other products and services. Despite statements made in previous years that it would phase out support for Horizon, SirsiDynix now maintains a firm commitment to this product. Through a web services add-on available for both Symphony and Horizon, the company is able to develop new patron interface and staff management products that work with either ILS.

COMPANY NEWS In recent years, the company has worked to shift its customer libraries away from local installations to hosted services and has offered incentives for long-term maintenance contracts. The Mississauga Library System in Canada, for example inked a ten-year deal as it migrated from Dynix to Symphony; extended maintenance contracts of five to seven years with reduced annual increases are more common. Over 750 libraries currently rely on software hosted by SirsiDynix.

VTLS Inc.

Blacksburg, VA; 540-557-1200

[www.vtls.com](http://www.vtls.com)

VTLS provides a wide array of products and services to libraries, including the Virtua ILS and the VITAL digital asset management system based on Fedora. The company is privately owned by founder and CEO Vinod Chachra. Though based in the United States, VTLS reports that 81 percent of its revenues come from its customers outside the country.

COMPANY NEWS VTLS saw a decrease of personnel from the 110 FTE reported last year to 86. Although the number decreased overall, personnel dedicated to development rose from 24 to 29, consistent with major initiatives to create the new Open Skies platform.

This year VTLS reported enhancements made to Virtua to enable floating collections with dynamic load balancing of materials among branches. The company continues to specialize in interface development based on the open source Drupal content management system, offering support and development services under the brand Vorpal Solutions. VTLS has begun development work to bring linked data support into VITAL and its other products.

The company made 14 sales of Virtua, bringing the total number of installations to 1,837.

#### TABLE 1: LIBRARY SERVICE PLATFORMS 2012 ACTIVITY

Legend for Chart:

A - COMPANY  
B - SYSTEM NAME  
C - TOTAL CONTRACTS  
D - TOTAL LIBRARIES

A B  
C D

Ex Libris Group	Alma
17	71
Innovative Interfaces, Inc.	Sierra Services Platform
117	303
OCLC	WorldShare Management Services
163	--
Serials Solutions	Intota
(under development)	--

SOURCE: LJ AUTOMATION MARKETPLACE SURVEY 2013

**TABLE 2: THREE-YEAR SALES TRENDS AND SUMMARY[\*]**

Legend for Chart:

- A - COMPANY
- B - SYSTEM NAME
- C - NEW CUSTOMERS 2010
- D - NEW CUSTOMERS 2011
- E - NEW CUSTOMERS 2012
- F - TOTAL SALES 2010
- G - TOTAL SALES 2011
- H - TOTAL SALES 2012
- I - 2012 U.S. SALES
- J - 2012 NON-U.S. SALES
- K - TOTAL INSTALLED

A	B	C	D	E	F	G	H
	I	J	K				
INTEGRATED LIBRARY SYSTEMS FOR PUBLIC, ACADEMIC, AND CONSORTIA							
	--	--	--	--	--	--	--
	--	--	--				
Auto-Graphics							
Agent VERSO		13	12	16	13	16	19
394		463	517				
Biblionix							
Apollo		87	79	79	87	79	80
192		272	352				
ByWater Solutions							
Koha		44	48	34	44	54	34
167		446	554				
Capita							
Capita Alto		0	1	0	0	1	0
112		110	99				
Civica							
Spydus 8 / MS		11	15	17	32	46	26
271		279	292				
EOS International							
EOS.Web		97	91	58	97	91	58
1097		1130	1078				
Equinox Software							
Evergreen		15	20	11	15	21	37
354		450	417				
Ex Libris							
Aleph		30	18	20	39	25	26
2291		2316	2342				
Ex Libris							

Voyager	1	1	6	5	1	6
1251	1255	1261				
Infor						
V-Smart	12	--	--	21	--	23
73	141	167				
Infor						
Vubis Smart	1	--	--	1	--	0
350	213	124				
InfoVision Software						
Evolve	5	9	11	73	19	11
81	100	111				
Innovative Interfaces						
Millennium	37	32	30	39	32	30
1412	1425	1330				
Keystone Systems						
KLAS	0	0	0	0	0	0
108	106	109				
LibLime (division of PTFS)						
LibLime Academic Koha	--	7	--	--	7	5
--	123	130				
LibLime (division of PTFS)						
LibLime Koha	44	27	--	44	27	37
147	503	550				
The Library Corporation						
Carl.X / Carl.Solution	0	0	0	3	2	1
12	20	5				
The Library Corporation						
Library.Solution	43	48	13	43	48	13
749	773	768				
OCLC						
Amlib	--	--	--	12	--	--
462	460	--				
Polaris Library Systems						
Polaris ILS	23	53	27	23	53	30
1707	1798	2539				
SirsiDynix						
Horizon	0	2	1	20	2	1
1406	1311	1183				
SirsiDynix						
Symphony	47	41	89	126	122	104
2255	2377	2433				
VTLS						
Virtua	21	12	14	22	13	14
--	400	1837				

\*Numbers represented here are as reported by the vendors; blank spaces indicate that no data was provided, or companies gave only aggregate figures. Special libraries not included.

SOURCE: LJ AUTOMATION MARKETPLACE SURVEY 2013

### TABLE 3: PERSONNEL ANALYSIS\*

Legend for Chart:

- A - COMPANY
- B - DEVELOPMENT
- C - SUPPORT
- D - SALES
- E - ADMIN

F - OTHER  
 G - 2012 TOTAL  
 H - 2011 TOTAL  
 I - 2010 TOTAL

A	B	C	D	E	F	G
H	I					
Auto-Graphics	11	7	6	4	7	35
34	32					
Axiell	55	53	30	29	31	198
226	223					
Baratz	19	16	19	12	21	87
--	--					
Book Systems	15	22	16	4	2	59
60	60					
ByWater Solutions	3	12	2	4	1	13
13	6					
Capita (formerly Talis)	--	--	--	--	--	49
43	86					
Civica	19	382	14	10	--	425
410	400					
EOS International	13	12	17	4	3	50
52	52					
Equinox Software	4	6	3	5	2	20
21	22					
Ex Libris	189	222	53	46	12	522
512	504					
Follett Software Co.	78	151	81	--	31	341
365	408					
Infor Library Solutions	16	36	13	6	--	71
71	71					
InfoVision Technology	5	3	2	0	--	10
13	10					
Innovative Interfaces	89	161	53	31	7	341
311	307					
Keystone Systems	5	5	3	2	1	16
17	17					
L4U Library Software	5	5	4	3	2	19
19	20					
LibLime (div. of PTFS)	5	16	3	8	8	155
155	155					
The Library Corporation	39	91	28	13	28	199
199	199					
OCLC	--	--	--	--	--	1250
1211	1200					
Polaris Library Systems	27	46	18	2	--	93
86	78					
Serials Solutions	131	51	51	3	20	256
237	208					
SirsiDynix	86	168	52	22	41	369
380	385					
VTLS	29	37	9	7	4	86
110	96					

\*Numbers represented here are as reported by the vendors;  
 blank spaces indicate that no data was provided.

SOURCE: LJ AUTOMATION MARKETPLACE SURVEY 2013

TABLE 4: SALES OF PRODUCTS BY CATEGORY[\*]

Legend for Chart:

- A - COMPANY
- B - SYSTEM NAME
- C - NEW NAME CUSTOMERS
- D - TOTAL CONTRACTS
- E - INSTALLED

A	C	D	E
B			
ALTERNATIVE SEARCH OR DISCOVERY PRODUCT			
--	--	--	--
Axiell Group			
Axiell Arena	--	104	247
Capita			
Prism	0	00	95
Civica Pty Limited			
Sorcer	1	3	42
EBSCO Publishing			
EBSCO Discovery Service	--	--	--
Ex Libris			
Primo	32	101	1151
Innovative Interfaces			
Encore	--	--	365
The Library Corporation			
LS2 Kids	--	78	162
The Library Corporation			
LS2 Mobile	--	119	151
The Library Corporation			
LS2 PAC	--	73	305
Mandarin Library Automation			
Library Usage Module	--	226	--
Mandarin Library Automation			
M3 Web OPAC	--	38	--
Mandarin Library			
Mandarin CMS Content	--	82	--
Automation			
Management System	--	--	--
OCLC			
WorldCat Local	--	--	1683
Serials Solutions			
AquaBrowser Unified Discovery Interface	58	--	--
Serials Solutions			
Summon Web-Scale Discovery Interface	158	--	504
SirsiDynix			
SirsiDynix Enterprise	16	102	328
SirsiDynix			
SirsiDynix Social Library	16	81	116
VTLS			
Chamo	12	23	86
VTLS			
Chamo Discovery	1	3	6
VTLS			
MozGo Mobile App	--	3	3

VTLS			
Vorpal (Drupal-based solutions)	--	4	7
RESOURCE-SHARING SYSTEMS			
--	--	--	--
Auto-Graphics			
Agent Resource Sharing -- SHAREit	--	--	3212
OCLC			
ILLiad	--	--	1227
OCLC			
WorldCat Resource Sharing	--	--	9929
Serials Solutions			
Ulrichsweb Serials Intelligence Service	43	--	--
VTLS			
FASTRAC (RFID)	2	2	28
ELECTRONIC RESOURCE MANAGEMENT MODULE			
--	--	--	--
Civica Pty Limited			
Blis	2	2	15
Ex Libris			
Verde	0	1	230
Innovative Interfaces			
Electronic Resource Management	--	--	345
OCLC			
WorldShare License Manager	--	--	691
Polaris Library Systems			
EBook Integration with 3M Cloud Library	--	20	1
Serials Solutions			
360 Core	36	--	--
Serials Solutions			
360 Counter	68	--	311
Serials Solutions			
360 Resource Manager	39	--	--
DIGITAL LIBRARY MANAGEMENT SYSTEM			
--	--	--	--
Auto-Graphics			
Agent Digital Collections	--	--	2
Ex Libris			
DigiTool	3	5	198
Ex Libris			
Ex Libris Rosetta	0	4	17
LibLime (a division of PTFS)			
ArchivalWare	15	15	6
The Library Corporation			
LS2 Staff	--	60	60
OCLC			
CONTENTdm	--	--	999
Serials Solutions			
Ulrich's Serials Analysis	13	--	--
--			
System	--	--	--
SirsiDynix			
eResource Central	1	87	1
Softlink International			
InfoNet	--	--	--
Soutron Global			
Soutron	29	29	29
VTLS			

VITAL Media	--	--	1
OPENURL LINKING APPLICATION			
--	--	--	--
EBSCO Publishing			
LinkSource	--	--	--
Ex Libris			
SFX	58	90	2457
Innovative Interfaces			
WebBridge LR	--	--	401
Serials Solutions			
360 Link	148	--	1133

\*Numbers represented here are as reported by the vendors; blank spaces indicate that no data was supplied, or companies gave only aggregate figures. U.S. companies only.

SOURCE: LJ AUTOMATION MARKETPLACE SURVEY 2013

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By Marshall Breeding

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RUSH: No, no, no. My point here is it should be easy to defeat the left the because we know whatâ€™s coming. They canâ€™t innovate. Theyâ€™re using things 30 years old. Theyâ€™re just adapting issues but theyâ€™re not adapting techniques. Hereâ€™s an example. Itâ€™s not the best, but itâ€™s an example. They brought back Will & Grace on NBC. Theyâ€™re going back to the glory days of Thursday nights. If they could bring back Seinfeld, they would. They went back to Will & Grace.