

Migrations take off
while the pressures to innovate mount
By Marshall Breeding

GRADUAL EVOLUTION

The integrated library system (ILS) is changing—not dramatically but steadily. Forces at work include an improving economy, pressures to innovate, new products that manage electronic content (see “Trojan Horse,” p. 46), and, most of all, mandatory migrations.

Overall industry revenues, estimated at \$525 million, grew by almost 5% relative to 2003. This figure represents total revenues of all companies that participate in the North American automation market. Most companies grew their gross earnings, and, in many cases, non-ILS products and sales to non-U.S. clients generated more income than ever before (see Table 3, p. 45).

It was an especially fertile year for migration (see Table 4, p. 46ff.). In 2003 many libraries deferred moving from obsolete systems, creating a pent-up demand that began to break loose in 2004, when migrations increased by 12%. This is an important trend to follow, since to succeed, companies must both attract new accounts and retain current customers. Just signing legacy sites to your flagship product does not increase market share.

Total contracts were down by 2%, though we estimate that far more libraries were represented this year than last, consistent with the trend toward increased numbers of libraries per system implementation. New-name contracts were down by

12%, indicating that more libraries stay with their current vendor as they migrate.

Dynix led in total sales with 193 contracts signed, a record unsurpassed in the last four years by any others—especially impressive since these contracts cover 1640 libraries. In the competition for new clients and market share gains, Innovative Interfaces tied for second with contracts to 76 new-name clients (568 libraries). Sirsi delivered strong sales performance, coming in second in total contracts and tying for second in new-name accounts. For individual libraries, Innovative brought into its fold more than twice that of Sirsi. Dynix leads by far in installed sites, with 3,599 running either Dynix Classic or Horizon.

As the domestic ILS market becomes more highly saturated, companies increasingly rely on international sales, with about 8% more non-U.S. sales in 2004 compared with 2003. International contracts, however, typically represent smaller projects.

Who's up, who's down

Defections from the current flagship system impact market share and reputation. While few libraries switch to competing systems, at least ten this year moved from Sirsi's flagship, Unicorn, to other systems. **The demise of the Detroit Area Library Network was painful to Dynix, with both an Association of Research Libraries (ARL) member and a major**

Marshall Breeding is Library Technology Officer, Jean & Alexander Heard Library, Vanderbilt University, Nashville

TABLE 1 FOUR-YEAR SALES TRENDS BY CATEGORY*

COMPANY	SYSTEM NAME	TOTAL SALES				NEW CUSTOMERS				TOTAL INSTALLED
		2001	2002	2003	2004	2001	2002	2003	2004	
FULL-FUNCTION MULTIUSER SYSTEMS: PUBLIC, ACADEMIC, CONSORTIA										
Sirsi Corporation	Unicorn Library Management System	117	207	124	134	110	72	46	76	1,719
Dynix	Horizon	126	114	168	193	60	43	77	63	1,481
Endeavor Information Systems	Voyager	50	44	35	22	50	44	35	22	1,304
Innovative Interfaces, Inc.	Millennium	157	136	144	119	66	71	96	76	1,160
Ex Libris	ALEPH 500	80	58	51	53	70	48	42	53	923
The Library Corporation	Library.Solution	79	70	73	58	74	61	64	55	607
InfoVision Software	Amlib Library Management System	36	139	58	39	5	139	58	39	493
VTLS Inc.	Virtua	37	60	67	35	21	26	34	28	199
Civica	Spydus	50		21	16	9		21	5	199
Geac	V Smart	13	34	54	56	8	9	17	19	164
Fretwell-Downing, Inc.	OLIB7			46	55			12	8	160
ISACSOFT	PortFolio	30	40	14	18	26	15	14	6	156
Auto-Graphics, Inc.	Impact/VERSO (local or ASP)	14	19	6	23	10	18	4	20	106
GIS Information Systems	Polaris Integrated Library System	12	21	20	37	2	6	9	6	92
Keystone Systems, Inc.	KLAS	4	13	6	3	4	10	4	3	58
ISACSOFT	Concerto	22	20	5	12	12	5	5	4	45
The Library Corporation	Carl.X				1				0	0
AUTOMATION SYSTEMS: CENTRALIZED SCHOOL DISTRICTS										
Follett Software Company	Destiny Library Manager for Districts			25	143			10	71	169
Sagebrush Corporation	Sagebrush Accent	9	22	5	55	53	20	5	32	135
Softlink America Inc.	Softlink Oliver			20	68			20	46	68
Book Systems, Inc.	Atrium				30				13	30
AUTOMATION SYSTEMS: INDIVIDUAL SCHOOLS										
Follett Software Company	Follett Circulation Plus and Catalog Plus	6,275	4,088	3,040	1,618	3,279	2,414	1,354	990	35,396
Sagebrush Corporation	Sagebrush Spectrum	2,461	2,388	2,150	1,399	1,424	1,403	1,290	496	19,930
Sagebrush Corporation	Sagebrush Athena	2,091	1,986	1,787	575	1,208	1,208	1,072	522	13,576
COMPAnion Corp.	Alexandria		1,530	1,538	1,085		646	682	432	9,469
Softlink America Inc.	Softlink Alice	1,006	650	398	417	1,006	500	398	385	8,500
New Generation Technologies Inc.	LIBRARYSOFT	337		796	710	281		580	564	3,600
Book Systems, Inc.	Concourse	1,912	1,361	954	627	1,402	1,009	713	497	8,484
Mandarin Library Automation, Inc.	Mandarin M3	132	225	231	104	87	225	231	104	2,893
CASPR Library Systems, Inc.	LibraryWorld	330		203	89	330		72		2,251
CASPR Library Systems, Inc.	LibraryCom	243		167	195	243		167	195	541
Follett Software Company	Destiny Library Manager for Schools				44				40	50
CASPR Library Systems, Inc.	LibraryNet	32		30	5	32		28	5	
Corporate Networks	Insignia Library System	191		197		191		197		
AUTOMATION SYSTEMS: SPECIAL LIBRARIES										
Softlink America Inc.	Softlink Liberty3		22	129	122		21	103	104	213
EOS International	EOS.Web			18	157			15	42	175
Softlink America Inc.	Softlink Liberty3 ASP			6	15			6	13	17
Inmagic, Inc.	DB/Text for Libraries	1,840	1,421	1,712		402	387	254		
EOS International	GLAS	166		209		68		82		
EOS International	Q Series	31		54		15		32		
CyberTools, Inc.	CyberTools for Libraries	15	26	27		15	26	27		
Softlink America Inc.	Softlink Library Corporate	33	45	132	127	20	15	132	127	
ENTERPRISEWIDE AUTOMATION SYSTEMS: SPECIAL LIBRARIES										
SydneyPLUS	SydneyPLUS				26				6	368
Open Text, Inc., BASIS Division	Livelink for Libraries	20	14	15	20	10	6	4	2	213

SOURCE: LJ AUTOMATED SYSTEM MARKETPLACE 2005 *Where there are blank spaces, no data were available

metropolitan facility abandoning Horizon. These lateral moves continue to be anomalies but might be early indicators of dissatisfaction. When the current cycle of legacy migrations plays out, the next level of competition will be vulnerable accounts running flagship systems. Early battles may have already begun.



It takes multiple measures to assess the gains and losses among vendors. Counting contracts alone doesn't suffice, given variations in the numbers of libraries, differences in collection sizes, and complexity of automation needs. This year, we look deeper


than the raw contract counts, factoring in the weight of each according to the number of libraries represented. Share can be understood by the formula: New-Name Sales minus Legacy Losses (plus Flagship Defections) equals Net Gain/Loss.

With the largest market share gain in 2004, Innovative Interfaces worked this formula to its advantage. Only six sites with INNOPAC selected competing systems, and two Millennium sites defected (single libraries in consortia moving to independent implementations). The 76 new accounts minus eight losses means a net gain of 68 accounts (534 libraries.) In-

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<p>From: "Sheble, Mary A" <MASHEBLE@OAKLANDCC.EDU> Sender: DALNET Board <DALNETB@LISTS.WAYNE.EDU> Subject: DALNET: Library Journal Article Date: Wed, 13 Apr 2005 14:40:31 -0400 To: DALNETB@LISTS.WAYNE.EDU</p>	
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Earlier today, Debbie Adams sent a message to the Board listserv, citing an article by Marshall Breeding in the April, 2005 issue of Library Journal (Gradual Evolution: Migrations Take Off While the Pressures to Innovate Mount, Vol 130, Issue 6: pp 42-47). As Debbie noted, in the second section (Who's up; who's down), the article reads: "The demise of the Detroit Area Library Network was painful to Dynix, with both an Association of Research Libraries (ARL) member and a major metropolitan facility abandoning Horizon." (I'm looking at an e-copy of the article, which I assume is comparable to the print copy.)

Several Board members indicated they would like to see a short rejoinder sent to Marshall, stating that DALNET is alive and well despite a reorganization – possibly asking him to send a short statement to Library Journal for a future issue. Another Board member suggested writing a short note to Library Journal to let them know DALNET is very much alive and moving forward.

As I reviewed the article, I thought of several possible interpretations of the DALNET statement – and there may be others. My first thought – losing two major ILS customers was painful to Dynix – regardless of previous/current affiliation of the members. I think some people are also reading the statement as indicating DALNET is in decline.

If you have ideas to contribute to the discussion or an opinion on issuing a response, please post your ideas or send them directly to me.

Thanks, Debbie, for bringing our attention to the article.

Mary Ann Sheble

Director, Library Systems

Oakland Community College

248.232.4476 (voice)



[feedback]

"I stole my first and last book from a high school library back in the Seventies. It's still on my shelf... to remind me that nothing human is alien to me"

Delinquency = expression

Thanks to David Isaacson for his exercise in public spirit ("Let Them Steal Books," BackTalk, *LJ* 4/1/05, p. 68). I stole my first and last book from a high school library back in the Seventies. It's still on my shelf, not just because I still occasionally read William Blake these days but to remind me that nothing human is alien to me. (I paid for *Steal This Book*.) Those of us who serve the public should remember that delinquency is an expression, maybe temporary, of social diversity, too.

—Lawrence Clayton, Libn.,
Lake Villa P.L. Dist., IL

"LastGen" for NextGen

I have a scattering of *LJs* on my desk, using the slower summer service period to get caught up on reading, buying, and learning. The NextGen articles have been my favorite lately. I'll be celebrating my 25th reunion from library school next year (has it really been that long?!), so call me the LastGen or, gasp!, OldGen? Post-Boom? To see the NextGeners write passionately about the work I've been doing since I was 16 years old leads me to believe that librarianship, information management, library values, and all that other important "stuff" is still moving in a good direction....

Gabriel Morley's "Five Things Right, Five Wrong" (*LJ* 4/15/05, p. 60) should be required reading for all managers, even in that mandatory management course in library schools everywhere. When I speak at library schools, I usually tell students that it is not the best

idea to start out by taking a job as the sole librarian. There are no mentors to work with or to learn from, no one to teach the craft and practice of "real-world librarianship." Trial by fire by starting at the top really isn't the best way to go to learn one's profession. Morley, however, does good work and is smart enough to figure out the essentials and humble enough to listen when those around him offer advice. I predict a large city library for him one day.

Rachel Singer Gordon's "Revenge of the NextGen People" (*LJ* 5/15/05, p. 78) on what the American Library Association can do to attract NextGen librarians is something I will be dealing with this year as president of the Ottawa Chapter of the Canadian Association of Special Libraries and Information Services, a division of the Canadian Library Association. I see NextGen librarians out there, but many of them have not come into the fold. I need them, I want them, and our associations have to let them in and let them take the leadership roles. We'll end up with an entirely new dimension and ideas on our programming, policy, and service issues.

Finally, another new director, Christine Schutz in "Making the Big Decisions" (*LJ* 7/05, p. 50), talked about finding your style and your own voice as a manager and a leader. To this I would add learn to trust your gut. Go with what your instinct is telling you to do, and you'll more than likely end up in the right place. That gut stuff usually comes with experience but Schutz has learned if you trust your sense of style and voice, you'll instinctively do what is best for your clients, your service, and your organization.

Those of us in the LastGen can learn a thing or two from our NextGen colleagues. Let's not spurn their talent, their passion, or their enthusiasm for our profession by believing we are the

ones who "should" be doing the teaching and mentoring.

Keep 'em coming *LJ!*

—Terri Tomchyshyn, Libn., Dept. of
National Defence, Ottawa, Ont.

DALNET is alive & well

We members of the Detroit Area Library Network (DALNET) are concerned that readers may have an incorrect impression of our consortium after reading Marshall Breeding's *Gradual Evolution* (Automated System Marketplace 2005, *LJ* 4/1/05, p. 42ff.). Breeding notes, "The demise of the Detroit Area Library Network was painful to Dynix, with both an Association of Research Libraries (ARL) member and a major metropolitan facility abandoning Horizon...."

We want the library community to know that DALNET is alive, well, and thriving. We are a multitype and multi-county library consortium in Southeast Michigan, with 21 museum, medical, academic, and public library members, including the two institutions that contract with vendors other than Dynix. DALNET runs the Dynix Horizon system for 19 members, but, like other consortia, we are much more than an integrated library system.

Our resources include a web-based calendar of regional health events and services, an extensive array of unique digital resources made possible through a DALNET-wide grant, cooperative resource sharing agreements, and a base from which our members participate in broader regional and state initiatives....

Working together, DALNET libraries continue to capitalize on their unique strengths to deliver information to meet the...needs of their users.

—Mary Ann Sheble, Chair, DALNET
Board of Directors and Dir., Library
Systems, Oakland Community Coll.,
Bloomfield Hills, MI

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