Library Automation Systems and Services - Global Strategic Business Report


Please note: Reports are sold as single-site single-user licenses. The delivery time for hard copies is between 3-5 business days, as each hard copy is custom printed for the organization ordering it. Electronic versions require 24-48 hours as each copy is customized to the client with digital controls and custom watermarks.

For information on site licence pricing please click on Enquire before buying

Contents:

I. INTRODUCTION, METHODOLOGY & PRODUCT DEFINITIONS
   Study Reliability and Reporting Limitations I-1
   Disclaimers I-2
   Data Interpretation & Reporting Level I-2
   Quantitative Techniques & Analytics I-3
   Product Definitions and Scope of Study I-3
   Integrated Library Systems I-3
   Non-Integrated Library Systems I-3
   System Maintenance Services I-3

II. A NORTH AMERICAN MARKET REPORT
   1. Industry Overview II-1
      A Changing Landscape II-1
      The Fragmented Nature of Library Automation and Services
      Industry II-1
      Many Facets of Industry Consolidation II-2
      Pros and Cons of M&A Activity in Library Automation Marketplace II-2
      Competitive Scenario II-2
      A Glance at Competition in 2005 II-3


Sales Performance of Select Companies by Major Library Type II-6
Academic, Public, and Consortia Libraries II-6


Centralized School District Libraries II-8


Individual School Libraries II-9


Special Libraries II-11

Softlink America, CyberTools, and EOS International (includes corresponding Graph/Chart) II-11


Leading Vendors Rely on Diversification Strategy to Stay Competitive II-12
Smaller Companies Create their Own Space II-12
Big Guys Penetrate Small Library Market through ASP Model II-13
Companies Innovate to Stay Competitive in Academic Library Marketplace II-13
Companies from Related Sectors Seek Opportunities in Library Automation Market II-13
Key Market Trends & Issues II-13
Library Automation Systems Market - Changing Technological Needs Drive Innovation II-13
Service Oriented Architecture Brings Innovation in Library Automation Market II-14
Latest Integrated Library Systems Offer Advance Reporting Capabilities II-14
Increasing Shift Towards Non-ILS Products II-14
Electronic Resource Management Takes Center Stage II-14
Metasearch Technology Drawing Big Bucks II-15
Growing Transition Towards User-Friendly Interfaces II-15
Wave of Legacy Migrations to Subside in Few Years II-16
Legacy Migrations and Beyond II-16
Libraries Forming Consortia to Draw Maximum Mileage II-16
Key Factors Driving Libraries to Join a Consortium II-17
Cost Minimization II-17
Resource Sharing II-17
Access to Cutting-edge Features II-17
Professional Management of Automation Resources II-17
Increased Purchasing Leverage II-17
Consortium Framework Allows Hybrid Systems II-18
Library Automation Companies Offering Shared ILS Systems to Dominate II-18
K-12 Libraries Move Towards Shared Systems II-18
Open Source Systems - Still a Long Way to Go II-18
Major Issues and Challenges Facing the Library Automation Marketplace II-18
Integrating with Broader Information Scene II-19
Requirement for Seamless Integration II-19
Decision on Type of Service Model II-20
E-commerce Adoption Issues II-20
Use of Institutional Repository Technology II-20
Issues Relating to Open Source Software Adoption II-20
Lengthy Procurement Processes for Library Systems II-20
Low-Level of Standardization in Library Internal Workflow/ Processes II-21
Need to Participate in High-Level Forums II-21
Competitive Issues II-21
Avoiding Data Redundancy and Duplication - A Key Challenge for Libraries II-22
Issues Related to Shared ILS II-22
Library’s Identity and Control II-22
Aligning with Like-Minded Partners II-22
Integrating Library Automation with Large Business Systems - The Positives and Negatives II-22
Reinventing the Integrated Library System II-22
Lack of Sufficient Integration II-23
Major Hurdles in Integration II-23
Nature of Library Procurement Procedure II-23
Business Considerations II-24
Integration of Non-ILS Products with Core ILS - The Future
Direction II-24
Major Challenges Faced by ILS II-24
Pricing an Integrated Library System II-25
Digital Library - A Perspective II-25
Introduction II-25
Key Functions of Digital Libraries II-25
Major Elements in a Digital Library System II-26
Technology Platform for Developing a Digital Library II-26
Evolution and Development of Digital Libraries II-26
Digital Library and Conventional Library - A Comparison II-27
Digital Library - The Changing Face of Modern Library II-27
Integration of Digital Library in Current Library Environment II-28
Digital Libraries Boost Shift Towards Virtual Learning Environment II-28

2. Product Overview II-29
Library Automation System - A Primer II-29
Library Automation Software/System Categories II-29
Distributed Site-Based Systems II-30
Centralized Systems II-30
"Union" Systems II-30
Approaches to Design and Develop a Library Automation System II-31
Evolution II-31
Revolution II-31
Off-the-Shelf System Approach II-31
Customized System Approach II-31
Integrated Library Systems II-31
Advantages of ILS II-32
The Changing Face of ILS II-32
Non-Integrated Library Systems II-32
Metasearch Products II-32
Reference Linking II-33
OpenURL Link Resolvers II-33
Electronic Resource Management (ERM) Products II-33
Digital Library Products II-33
System Maintenance Services II-33
Open Source Library Automation Systems II-33
Application Service Provider (ASP) - A Low Cost Model for Library Automation II-34
RFID System - A Supporting Technology in Library Automation II-34
RFID System Implementation II-35
Library Automation - A Historical Perspective II-35
Choosing a Library Automation System - Key Dynamics II-37
Development and Implementation of a Library Automation System II-38
System Development II-38
Building the Library Database II-38
Authority Control in Databases II-38
Classification System II-39
Incorporating Key Item Identification Technologies in New System II-39
Barcodes II-39
RFID - An Innovative Reading Technology II-39
Migration of Bibliographic Data to New System II-39
Migration of Circulation Data to New System II-40
Integration of Circulation Rules in New System II-40
System Implementation II-40
Installation II-40
Key Considerations During Installation Process II-41
Type of Communication Model II-41
Physical Access to Server II-41
TCP-IP Based Network II-41
Network Security II-42
Network Safety II-42
Selection of System Software II-42
Selection and Installation of Database Management System II-42
Training II-42
Developing an Electronic Resources Management System II-43
Requirements for Developing an Electronic Resource Management System II-43
Name of the Database II-43
Identification of Manufacturer and Related Participants II-43
Database Content II-43
License Duration and Renewal Alert II-44
Effective Packaging II-44
Electronic Record of Contract II-44
Details of Pricing and Payment Schedules II-44
Details of Vendor Contacts II-44
Record of Database Usage II-44
Determining Subscription Cost Per Use II-44
Access Procedures and Restrictions II-44

3. Regulatory Environment II-46
Library Services and Technology Act II-46
Reauthorization of Museum and Library Services Act II-46
Regulatory Requirements for LSTA Grantees Under CIPA II-46

4. Standards in Library Automation Industry II-48
The Z39.50 Family II-48
Z39.88 - The OpenURL Framework Standard II-48
Interlibrary Loan (ILL): ISO 10160/10161-1 Standard II-49
Z39.89 - The U.S. National Z39.50 Profile Standard II-49
Machine-Readable Cataloguing (MARC) II-49
Open Archives Initiative II-50
Dublin Core II-50
Metadata Encoding and Transmission Standard (METS) II-50
Encoded Archival Description II-50

5. Product Introductions/Innovations II-51
Auto-Graphics Introduces AGent Telephone Attendant™ II-51
Auto-Graphics Unveils Enhancements for AGent Search™ II-51
SydneyPLUS Introduces Medical Library Management System II-51
VTLS Unveils Visualizer Version 1.0 II-51
Ex Libris Group Introduces Aleph Version 19 II-52
SirsiDynix Introduces Symphony 3.2 II-52
SirsiDynix Unveils SirsiDynix Docutek ERes 5.3.04 II-52
SirsiDynix Releases SirsiDynix Enterprise Portal Solution 2.2.1 II-52
SirsiDynix Unleashes SirsiDynix Horizon 7.4.1 and HIP II-52
EOS International Introduces Knowledge Services Templates II-53
SirsiDynix Introduces SirsiDynix StaffWeb II-53
Auto-Graphics and LAT Introduce Self-Checkout Solution II-53
Auto-Graphics Offers Interoperability Between AGent Digital Collections™ and OAI II-53
Auto-Graphics Provides Access to LexisNexis® Content II-53
Eloquent Releases WebGENCAT 3.6.1 II-54
Follet Introduces InfoCentre™ 3.0 II-54
Follet Unveils InfoCentre™ Version 2.3 II-54
Inmagic Plans to Release DB/TextWorks v11 and WebPublisher PRO v11 II-54
Polaris Library Systems Introduces SimplyReports II-54
SydneyPLUS Includes Shopping Cart for .NET Web OPAC II-54
Ex Libris Releases Primo II-55
Ex Libris Introduces PerX and TechXtra to MetaLib II-55
EOS International Introduces Additional Features for EOS.Web® II-55
SirsiDynix Introduces SirsiDynix Enterprise Portal Solution™ Version 2.2 II-55
SirsiDynix Unleashes SirsiDynix Symphony II-55
VITAL Port Introduced in Sun StorageTek™ 5800 System II-56
VTLS Releases Virtua Version 47 II-56
VTLS Releases VERIFY 2.0 II-56
Open Text Unveils Integrated Platform for Enterprise Content Management II-56
Endeavor Introduces Voyager 6.1 II-57
Sagebrush Launches InfoCentre 2.1 II-57
Inmagic Introduces Genie 2.1 II-57
Auto-Graphics Introduces Verso 6.0 II-57
Follett Launches Destiny Asset Manager Software for K-12 Schools II-58
Surpass Launches Self-Check Solution for Libraries II-58
Sno-Isle Expands AquaBrowser Library® Search Capacity II-58
Surpass Launches Surpass CL Automation System for Church Libraries II-58
Sagebrush Introduces Novel Data Management Tools for Library Automation II-58
Polaris Introduces Polaris Inventory Manager II-59
SirsiDynix, Launches Directors Station’ New Module II-59
Auto-Graphics Announces Availability of “Book-Buying Functionality” Technology II-59
The Library Corporation Releases Library.Solution® 3.3 II-59
Library Concepts Releases PC Card Catalog 3.14 II-60
Open Text Introduces Livelink II-60
Sagebrush Upgrades IRIS Application Services II-60
Sagebrush Releases InfoCentre™ 2005 II-60
Sagebrush Releases Accent Express Version 1.3 II-60
Auto-Graphics Launches Novel AGent Web Service Interface II-61
SirsiDynix Introduces LiveNetwork™ Network Management Solution II-61
Auto-Graphics Introduces AGent Digital Collections™ II-61
Auto-Graphics Unveils AGent LibraryCard™ II-61
FKI Logistex Expands FKI Logistex Library Product Range II-62
CyberTools Introduces Web Training Service Program for Libraries II-62
EOS International Introduces Updated Version of EOS.Web® II-62
Innovative to Introduce WebPAC Pro II-63
Innovative Introduces Second Major Update of ERM Product II-63
Surpass Debuts Generation 5 Library Automation System II-63
VTLS Releases VIRTUA Version 46 II-63
Sirsi Introduces Normative Data Project II-64
SydneyPLUS Creates SydneyPLUS Information Pathways II-64
VTLS Unveils Second Updated Edition of VITAL II-64
Geac Unveils Vubis Smart 2.4.1 II-64
Keystone Systems Releases KLAS v7 II-64
Mandarin Unveils Mandarin Oasis II-64
New Generation Develops AutoCataloguing Functional Module II-65
Polaris Debuts ASP Variant of Polaris Library Automation System II-65
Surpass Develops Auto-Feed ID Card Printer II-65
Follett Introduces Destiny Library Manager II-65
Innovative Launches Millennium Silver Platform II-65
CIVIC Designs Library/DECISION II-65
EOS International Launches .NET-Based Automation Technology for Libraries II-66
Sagebrush Launches Updated Version of In-Hand v 3.1 II-66
Innovative Releases Via Library Management System II-66

6. Recent Industry Activity II-67
K-12 Schools in Iowa and Kansas Choose AGent VERSO™ ILS II-67
Innovative Interfaces Commences Development of Encore 2.0 II-67
Akron-Summit County Public Library Selects Solutions from
Innovative Interfaces II-67
Indiana and Kansas Consortia Ink Contract with LibLime II-67
Integrated Technology Group Partners with Polaris Library Systems II-67
VCOM Partners with VTLS II-68
VTLS Inc. Enters into Partnership with WebFeat II-68
New York University Equips Library with Solutions from Ex Libris II-68
Dallas Public Library to Use Polaris ILS II-68
West Virginia Library Commission Installs Ex Libris Voyager II-68
Anderson Kill & Olick, P.C. Deploys EOS.Web Enterprise II-68
Francisco Partners Acquires Ex Libris II-69
Golden Gate Purchases Geac II-69
Follett Purchases Library Automation Operations of Sagebrush II-69
Endeavor Expands Partnership with TDNet II-69
SirsiDynix Partners with FAST II-69
Sagebrush to Join Hands with cmERDC II-70
Auto-Graphics Allies with iTeam II-70
SirsiDynix and EnvisionWare Join Forces II-70
Extensity Library Solutions Signs Agreement with Medialab II-70
Auto-Graphics Signs Contract with Guthrie Public Library II-71
Auto-Graphics Inks Contract with Hackettstown Free Public Library II-71
The Library Corporation Signs New Partnership Agreement with Medialab II-71
The Library Corporation Signs Contracts with New Libraries to Offer Library.Solution® II-71
Innovative Interfaces Offers INN-Reach System to Search Ohio Consortium II-72
SirsiDynix Offers Unicorn Library System to Prairie Area Library System II-72
SirsiDynix Offers Horizon 8.0 Library System to Toronto Public Library II-72
SirsiDynix Offers Horizon Library Management System to City of Unley II-72
EOS International Implements EOS.Web in Denver Botanic Gardens Special Library II-72
Fortinet Offers Multi-Function Security Appliances to Calgary Public Library and Alberta Library Systems II-73
EOS Implements EOS.Web Searching Tool in Moss Landing Laboratory II-73
EOS International Expands Law Library Client Base II-73
Endeavor Rebrands Product Range II-73
SirsiDynix Joins Hands with INFOhio II-74
Sirsi Merges with Dynix II-74
Sirsi Takes Over Docutek II-74
Softlink Acquires Limes II-74
The Library Corporation Purchases Tech Logic II-74
The Library Corporation Joins Hands with Cognos II-75
Softlink America Enters into Partnership with Cassidy Cataloguing II-75
Auto-Graphics Signs Partnership Agreement with Polaris II-75
VTLS Signs Contract with the National Library of Wales II-75
VTLS Inks Contract with Oxford University Library Services II-75
VTLS Inks Agreement with Tri-College Library Consortium II-76
The Library Corporation Inks Pact with Colorado Alliance of Research Libraries II-76
The Library Corporation Wins Order from Chicago Public Library II-76
Auto-Graphics Enters into Contract with Hunterdon County Library II-76
Auto-Graphics Inks Contract with Thunder Bay Public Library II-76
GIS Information Systems Changes Name to Polaris Library Systems II-76
The Library Corporation Implements Library.Solution® System
in Michigan School II-77
Innovative Interfaces Offers Millennium Automation System to Five City Councils in New Zealand II-77
Endeavor Offers Voyager Library System to The College of Law of England and Wales II-77
Endeavor Offers Meridian ERM System to the State and University Library of Denmark II-77
EOS International Offers EOS.Web® and EOS e-Library Service® to Alzheimer’s Association II-78
EOS International Offers EOS.Web Express to American Numismatic Association II-78
ISACSOFT Acquires BiblioMondo II-78
The Library Corporation Joins Forces with Endeca II-78
Monroe County Library Renews Contract with The Library Corporation II-79
Checkpoint Systems Signs Contracts with 10 Libraries II-79
Geac Signs Contract with Harnett County Public Library for Vubis Smart II-79
Geac Wins Contract from BT Consulting & Systems Integration II-79
Innovative Interfaces Offers Millennium Library System to ESADE Business School II-79
Corporate Networks Purchases Insignia Software II-80
Mandarin Partners with MuseGlobal II-80
MuseGlobal Joins Forces with Alexandria II-80
Dynix Allies with Sun Microsystems II-80
Mandarin Inks Agreement with Southern Ontario Library Service II-80
Brodart Exits Integrated Library System Business II-81
Innovative Interfaces Offers INN-Reach System to University Consortium in UAE II-81
Sirsi Acquires DRA II-81
Auto-Graphics Purchases Maxcess’ Software Assets II-81
Auto-Graphics Acquires WINGS from Pigasus Software II-81
DRA Inks Pact with netLibrary II-82
TLC/CARL Offers Library*Solution to Louisiana Libraries II-82
The Library Corporation Purchases CARL II-82
CASPR Inks Pact with Onward Education II-82

7. Focus on Select Players II-83
Auto-Graphics, Inc. (USA) II-83
Book Systems, Inc. (USA) II-83
Brodart Co Automation Div (USA) II-84
CASPR Library Systems, Inc. (USA) II-85
COMPanion Corporation (USA) II-85
CyberTools, Inc. (USA) II-86
Eloquent Systems, Inc. (Canada) II-86
Ex Libris Group (USA) II-86
Electronic Online Systems (EOS) International, Inc. (USA) II-87
Follett Software Company (USA) II-87
Infor Library and Information Solutions (USA) II-87
Inmagic, Inc. (USA) II-88
Innovative Interfaces, Inc. (USA) II-88
Insignia Software (Canada) II-88
ISACSOFT, Inc. (Canada) II-88
Keystone Systems, Inc. (USA) II-89
LibLime (USA) II-89
Mandarin Library Automation, Inc. (USA) II-89
New Generation Technologies, Inc. (USA) II-90
Open Text Corporation (Canada) II-90
Open Text, Inc. (USA) II-90
Polaris Library Systems (USA) II-91
SirsiDynix (USA) II-91
Softlink America, Inc. (USA) II-92
Surpass Software (USA) II-92
SydneyPLUS International Library Systems Corporation (Canada) II-92
The Library Corporation (USA) II-93
Visionary Technology In Library Solutions Inc. (USA) II-93

8. Market Analytics II-94


Table 13: North American 10-Year Perspective for Library Automation Systems and Services by Product Segment - Percentage Breakdown of Dollar Sales for Integrated Library Systems, Non-Integrated Library Systems, System Maintenance Services, and Others for Years 2003, 2008 & 2012 (includes corresponding Graph/Chart) II-95

III. COMPETITIVE LANDSCAPE

Ordering: Order Online - http://www.researchandmarkets.com/reports/450620/

Order by Fax - using the form below

Order by Post - print the order form below and send to

Research and Markets,
Guinness Centre,
Taylors Lane,
Dublin 8,
Ireland.
Fax Order Form
To place an order via fax simply print this form, fill in the information below and fax the completed form to 646-607-1907 (from USA) or +353-1-481-1716 (from Rest of World). If you have any questions please visit http://www.researchandmarkets.com/contact/

Order Information
Please verify that the product information is correct and select the format(s) you require.

Product Name: Library Automation Systems and Services - Global Strategic Business Report
Web Address: http://www.researchandmarkets.com/reports/450620/
Office Code: SCLOPGWF

Product Formats
Please select the product formats and quantity you require:

<table>
<thead>
<tr>
<th>Format</th>
<th>Quantity</th>
<th>Price</th>
</tr>
</thead>
<tbody>
<tr>
<td>Electronic (PDF) - Single User:</td>
<td></td>
<td>USD 3950</td>
</tr>
<tr>
<td>Hard Copy:</td>
<td></td>
<td>USD 3950 + USD 56 Shipping/Handling</td>
</tr>
<tr>
<td>Electronic (PDF) - 1 - 10 Users:</td>
<td></td>
<td>USD 7505</td>
</tr>
<tr>
<td>Electronic (PDF) - 1 - 15 Users:</td>
<td></td>
<td>USD 9480</td>
</tr>
<tr>
<td>Electronic (PDF) - 1 - 5 Users:</td>
<td></td>
<td>USD 5530</td>
</tr>
</tbody>
</table>

* Shipping/Handling is only charged once per order.

Contact Information
Please enter all the information below in BLOCK CAPITALS

Title:  
Mr [ ]  Mrs [ ]  Dr [ ]  Miss [ ]  Ms [ ]  Prof [ ]
First Name:                                      Last Name:  
Email Address: *  
Job Title:  
Organisation:  
Address:  
City:  
Postal / Zip Code:  
Country:  
Phone Number:  
Fax Number:  

* Please refrain from using free email accounts when ordering (e.g. Yahoo, Hotmail, AOL)
Payment Information

Please indicate the payment method you would like to use by selecting the appropriate box.

☐ Pay by credit card: You will receive an email with a link to a secure webpage to enter your credit card details.

☐ Pay by check: Please post the check, accompanied by this form, to:
Research and Markets,
Guinness Center,
Taylors Lane,
Dublin 8,
Ireland.

☐ Pay by wire transfer: Please transfer funds to:
Account number 833 130 83
Sort code 98-53-30
Swift code ULSBIE2D
IBAN number IE78ULSB98533083313083
Bank Address Ulster Bank,
27-35 Main Street,
Blackrock,
Co. Dublin,
Ireland.

If you have a Marketing Code please enter it below:

Marketing Code: ____________________________

Please note that by ordering from Research and Markets you are agreeing to our Terms and Conditions at http://www.researchandmarkets.com/info/terms.asp

Please fax this form to:
(646) 607-1907 or (646) 964-6609 - From USA
+353-1-481-1716 or +353-1-653-1571 - From Rest of World