# Annual vendor survey reveals competitive, changing market

Each year Information Systems Consultants Inc. (ISCI) surveys the library automation industry to produce an overview of the market and to facilitate comparison among vendors. This issue is devoted to summarizing the responses of vendors that offer integrated, multiuser, multifunction systems—those running on mainframes, minis, and supermicros using a multiuser operating system, whether UNIX, NT server, OS/400, or the proprietary operating system of another hardware manufacturer. The summary of survey results for PC and Mac-based systems will appear in the April 2001 issue of Library Systems Newsletter.

A review of the vendor responses leads the author to the following observations about the industry:

- **The number of new-name sales was off significantly in 2000.** The most striking finding of this year's survey is the significant decline in new-name sales, from 1,550 in 1999 to 895 in 2000. While there likely will be a rebound in 2001 and/or 2002, it is unlikely that there will be growth in the industry each and every year.

- **The industry was the most competitive it has ever been in 2000.** No single vendor dominated the market in 2000. Sirsi, the leader in new-name sales, had a 19 percent market share, but only six percent of the industry's revenues. To put the market in perspective: the former Ameritech Library Services, now epixtech, had 41 percent market share and 18 percent of the industry's revenues in 1995, the least competitive year in the past decade.

- **The transition to client/server architecture is almost complete.** All but one of the vendors that responded now offer client/server products, systems that control the presentation at the desktop. The Gateway product, the only exception, is hierarchical and controls the presentation on the host computer in the computer room. Although other vendors continue to support their older generation hierarchical products, most development efforts, and most sales are focused on client/server products. The primary advantage of client/server architecture is that it allows a server to support a variety of clients, and a client to access a variety of servers. The clients must be PCs, rather than dumb desktop terminals. With client/server systems, the new architecture costs more for a library to implement at the outset.

## There's more on the Web

The emphasis of this issue is on summarizing the industry as a whole. Detailed vendor-by-vendor reports will be posted online at ALA TechSource, www.techsource.ala.org. Not including individual vendor reports in this issue allows more space for analysis of the data.

**Coming Next Month:**

Who's leading the market in PC and Mac-based systems? Dick Boss presents the next round of results in the second part of the annual survey of auotmated library system vendors.

■ **Vendors are seeking to reduce the number of products they sell.** Although several vendors provide ongoing support for more than one product, only six are currently selling more than one product: BiblioMondo sells Concerto and Portfolio; DRA sells TAOS and MultiLis; epixtech sells Dynix and Horizon; Gaylord sells Galaxy and Polaris; Geac sells Advance and VUBIS; and TLC sells Library.Solution and CARL. Of these vendors, only epixtech and Gaylord developed both of their products. The others acquired the second product by purchasing another company. A development effort is underway at most of these vendors to consolidate offerings into a single product.

■ **Platform independence is now commonplace.** At one time, vendors sought to limit the number of supported hardware platforms in order to simplify diagnostics and increase margins through volume buying. Vendors now emphasize platform independence, meaning that a library has a choice. The options are usually Compaq Digital Alpha, HP, IBM, and Sun; and more recently, Intel-based platforms. This is made possible by the use of UNIX or NT, rather than a proprietary operating system. The only proprietary operating systems used are IBM's OS/400, the operating system used by Gateway, and Compaq Digital's Open VMS, one of the operating systems offered by Open Text.

■ **Most vendors now offer a choice of operating system.** UNIX remains the operating system of choice for large systems. 15 of the 21 vendors participating in the survey offer either UNIX or Windows NT server for smaller systems. ELiAS, Innovative, and TALIS offer only UNIX. Three vendors–EOS, Gaylord, and TLC–offer only Windows NT server. Berujo, Ex Libris and VTLS offer Linux as an option. Berujo also offers a Windows NT server option, but Ex Libris and VTLS do not.

■ **Oracle has become the most widely supported database management system.** Although most libraries do not require a specific database management system, those that do specify Oracle more often than any other. Community colleges and liberal arts colleges often have site licenses for Oracle, and require that all systems purchased use it. Oracle is the only product that is very well supported throughout the world, an important consideration for vendors as marketing efforts are increasingly international. Half of the vendors who responded now support Oracle. More significantly, more than two-thirds of new-name sales involve Oracle.

The vendors that do not offer Oracle are DRA, which uses ObjectStore; epixtech, which uses Sybase and UniVerse; Gateway, which uses DB2UDB; Gaylord, which uses Microsoft SQL server; Geac, which uses UniVerse and Informix; Inmagic and Keystone, which use Progress; Berujo and Lib-It, which use Cache'; Open Text, which uses BASIS; Sydney Plus, which uses a proprietary DBMS; and TALIS, which uses Sybase. ■

There was a significant decline in the number of new-name systems in 2000. Figure 1 summarizes the new-name sales back to 1984 for the industry as a whole, the first year of the annual survey. Only in 1996 and 1997 were there similarly sharp declines in new-name sales. The significance of sales data is that declining new-name sales affect a vendor's ability to fund aggressive product development. At a particular disadvantage are vendors that have recorded fewer than 25 new-name sales in the last year.

Several vendors attributed the decline to the large number of sales in 1999 to libraries facing potential Y2K problems with their existing systems, therefore causing them to move sooner than they otherwise might have. But that might not be true. 1999 sales were only 25 more than in 1998. The downturn is likely more sub-



| Year | Sales |
|------|-------|
| 2000 | 895 |
| 1998 | 991 |
| 1996 | |
| 1994 | |
| 1992 | 1,121 |
| | 674 |
| 1990 | 566 |
| | 435 |
| 1988 | 376 |
| | 350 |
| 1986 | 210 |
| | 196 |
| 1984 | 232 |

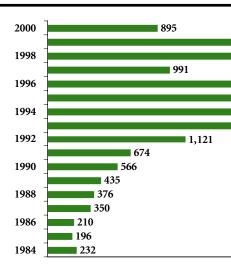**FIGURE 1. INDUSTRY-WIDE NEW-NAME SYSTEM SALES BY**
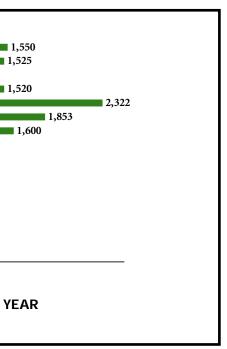(including estimates for non-respondants)

# INDUSTRY SALES

stantial than that for most of the vendors in the industry. Table 1 shows the number of new-name sales by vendor in rank order by year 2000 sales. The figures for the two prior years are also given where available.

The other vendors did not supply new-name sales figures. The Endeavor figure for 1999 and DRA figure for 2000 require explanations: Endeavor apparently counted databases, rather than number of contracts; DRA sold many small systems to school libraries under a statewide master contract.

The only vendor to have a significantly better year in 2000 than in 1998 and 1999 was

**What is the vendor's market share?**

Sirsi, now the leading vendor in the industry in new-name sales, but not in revenues as many of its systems are small ones and its installed customer base is still modest compared with those of epixtech and DRA.

Many factors likely led to the decline in sales that are more important than last year's Y2K concerns:

An increasing numbers of libraries are choosing to upgrade with their present vendors by adding memory, disk space and other components, and even replacing the entire central site. In 2000 the 16 respondents that provided upgrade information replaced the central sites of 239 systems, a figure substantially greater than in any previous year.

Many libraries with hierarchical systems, systems in which the host computer controls the presentation on desktop dumb terminals are postponing new procurements until they able to acquire enough PCs and upgrade their networks. If that is correct, likely expect a marked increase in sales in the next year or two.

The number of libraries automating for the first time also appears to be going down. After all, nearly 17,000 multifunction, multiuser automated library systems are now installed serving an estimated 28,000 libraries.

Vendors of PC-based systems are capturing more of the market now that they have gone to client/server architecture using Windows 2000. Follett and Sagebrush, the two largest vendors in that segment of the industry, signed up more than 8,000 customers in 2000.

**TABLE 1. NUMBER OF NEW-NAME SALES**

| Ranking | Vendor | Total Sales | | |
| --- | --- | --- | --- | --- |
| | | 2000 | 1999 | 1998 |
| 1. | Sirsi | 172 | 166 | 132 |
| 2. | Endeavor | 83 | 183 | 98 |
| 3. | TLC | 76 | 67 | 92 |
| 4. | epixtech | 65 | 150 | 127 |
| 5. | Innovative Interfaces | 56 | 104 | 83 |
| 6. | Ex Libris | 43 | 98 | 95 |
| 7. | DRA | 24 | 5 | 141 |
| 8. | VTLS | 23 | 21 | 18 |
| 9. | Geac | 22 | 57 | 41 |
| 9. | EOS International | 22 | 24 | 45 |
| 11. | Lib-It | 20 | na | na |
| 12. | BiblioMondo | 13 | na | na |
| 12. | Inmagic | 13 | na | na |
| 14. | Keystone | 7 | 10 | 6 |
| 15. | Open Text | 6 | 10 | 15 |
| 16. | Gaylord | 5 | 7 | 19 |
| 17. | Gateway | 3 | na | na |

1,550
1,525
1,520
2,322
1,853
1,600

YEAR

**What size library does the vendor handle?**

# INSTALLED BASE

A small number of vendors account for a large percentage of the installed base of nearly 17,000 multiuser, multitasking systems. Keep in mind that a number of the vendors not active in today's market still have hundreds of customers. The significance of a large customer base is not that it results in vigorous product development, but because it strengthens the financial viability of a company. It is rare for a company with a customer base of 100 or more customers to be unprofitable, even if it records very few new-name sales.

The existing customer base pays an average of 12 percent per year of the undiscounted purchase price of the system for maintenance, but existing customers also regularly make purchases of additional hardware and software. Even if the owners of a company with a large customer base decide to get out of library automation, there will be willing buyers.

Sydney Plus and Berujo, vendors that did participate in the survey, declined to provide information about the number of installed systems. Berujo had five installations when it reported in 1998 and added no sites in 1999.

### TABLE 2. TOTAL NUMBER OF INSTALLED AND ACCEPTED SYSTEMS

| Ranking | Vendor | Total No. Systems | Ranking | Vendor | Total No. Systems |
|---------|--------|------------------:|---------|--------|------------------:|
| 1. | epixtech | 3,260 | 11. | Gaylord | 283 |
| 2. | BiblioMondo | 1,400 | 12. | Open Text | 252 |
| 3. | DRA | 1,371 | 13. | Lib-It | 210 |
| 4. | Sirsi | 989 | 14. | Gateway | 166 |
| 5. | Innovative Interfaces | 949 | 15. | EOS International | 138 |
| 6. | Geac | 791 | 16. | TALIS | 109 |
| 7. | Endeavor | 713 | 17. | Inmagic | 45 |
| 8. | Ex Libris | 489 | 18. | Keystone | 39 |
| 9. | TLC | 381 | 19. | Elias | 10 |
| 10. | VTLS | 334 | | | |

# Revenues

Vendors realize revenues not only from new-name sales, but also from upgrades and maintenance. The larger the customer base, the larger the upgrade sales and maintenance income. The average size of system sold is also an important factor.

Revenues of under $5 million a year are an indicator of vulnerability. A library should be certain that the risk in purchasing from a small vendor is justified by the unique functionality or service that it offers. An example of unique functionality is Keystone's KLAS, a system that not only supports general libraries, but libraries for the blind. Sixty-seven percent of the company's customer base comes from libraries for the blind. No larger vendor offers a comparable product.

Some figures in Table 3 are estimates.

After adding estimates for the vendors that did not respond, the total revenues of vendors offering integrated multiuser, multifunction automated library systems were about $500 million in 2000—up from about $490 million in 1999, $480 million in 1998, and $435 million in 1997.

### TABLE 3. REVENUES FROM ALL SOURCES

| Ranking | Vendor | Dollar Amount (in millions) |
|---|---|---|
| 1. | epixtech | $70+ |
| 1. | Innovative | $70+ |
| 3. | Geac | $40–50* |
| 4. | DRA | $25–30 |
| 4. | Endeavor | $25–30 |
| 4. | Sirsi | $25–30* |
| 4. | TLC | $25–30* |
| 8. | BiblioMondo | $10–15 |
| 8. | Ex Libris | $10–15 |
| 8. | Gaylord | $10–15 |
| 8. | Open Text | $10–15 * |
| 12. | EOS Int'l | $5–10* |
| 12. | VTLS | $5–10 |
| 14. | ELiAS | $2.5–5 |
| 14. | Inmagic | $2.5–5 |
| 16. | Gateway | $1–2.5 |
| 16. | Keystone | $1–2.5 |
| 16. | Lib-It | $1–2.5 |
| 16. | TALIS | $1–2.5* |
| 18. | Berujo | $1 |

*Estimate.

**How healthy is the vendor?**

## who participated?

Twenty-one of the 38 vendors contacted that provide integrated, multi-user, multifunction automated library systems for supermicro, mini, or mainframe computers responded to the survey. They are believed to have 90% of sales in North America and more than 60% of sales in the rest of the world. Almost all the non-respondents are small companies or companies that sell their systems in only one or two countries, primarily in Europe or Australia. The major vendor that did not respond is BiblioMondo of Canada, a company with most of its sales in Canada and Europe.

Five vendors that have participated in past years are no longer in business: ALS, BiblioTech, CARL, COBIT, and NSC. ALS of France, the Netherlands, and United Kingdom was purchased by Best Seller of Canada and the entire company was renamed BiblioMondo. No response was received from the new company. BiblioTech was purchased by Inmagic; CARL was purchased by TLC; COBIT's board voted to dissolve the company; and NSC disconnected its telephones and closed its Web site. Advanced Computer Concepts changed its name to Berujo, Inc. ■

**Who handles systems in my market segment?**

# small and large system
# VENDORS

## TABLE 4. SYSTEMS SUPPORTING MORE THAN 200 CONCURRENT USERS

| Ranking | Vendor | No. Systems | Ranking | Vendor | No. Systems |
|---|---|---|---|---|---|
| 1. | DRA | 406 | 9. | Ex Libris | 40 |
| 2. | epixtech | 335* | 10. | Geac | 34 |
| 3. | Innovative Interfaces | 160 | 11. | Gateway | 28 |
| 4. | VTLS | 100 | 12. | TLC | 26 |
| 6. | Endeavor | 60 | 13. | Gaylord | 6 |
| 7. | Sirsi | 50* | 14. | Lib-It | 3 |
| 8. | Open Text | 42 | *Estimate. | | |

## TABLE 5. SYSTEMS SUPPORTING FEWER THAN 16 CONCURRENT USERS

| Ranking | Vendor | No. Systems | Ranking | Vendor | No. Systems |
|---|---|---|---|---|---|
| 1. | epixtech | 1,060* | 9. | Lib-It | 90 |
| 2. | DRA | 570 | 10. | Open Text | 76 |
| 3. | Geac | 366 | 11. | Gaylord | 59 |
| 4. | Endeavor | 286 | 12. | BiblioMondo** | 40 |
| 5. | Sirsi | 260* | 13. | Inmagic | 38 |
| 6. | TLC | 241 | 14. | Keystone | 30 |
| 7. | Ex Libris | 166 | 15. | BiblioMondo | 10 |
| 8. | Innovative | 100 | 16. | Gateway | 9 |
| *Estimate. | | | **North America only. | | |

## Experience, size are key for large systems

A minority of vendors has sold a significant number of large systems, those supporting more than 200 concurrent users. Libraries that require large systems usually prefer to deal with a vendor that has considerable experience not only with large hardware platforms but also with the complexity of libraries that require large systems. Table 4 lists vendors with at least 30 systems supporting 200 or more concurrent users.

The other vendors did not report statistics on system sizes. Berujo had two sites supporting more than 200 concurrent users in 1998.

## Small systems command notice

It is important that vendors pay attention to the small library market. To encourage the development of a desired product or feature, several dozen small libraries banding together to press for a specific feature to be developed have a much greater impact than a single library.

The rest of the companies did not report statistics on system sizes.

# MARKETS

## Market distribution reveals no worldwide leader

Although the industry is becoming increasingly international, most companies are strong in only a few areas of the world. Generally, a vendor has a better understanding of needs and provides better support where it has a significant presence.

## Vendors market segments

Some companies target all of the library market segments: academic, public, school, and special, but some only focus their attention on specific segments. A library should seek to purchase a system from a vendor with a significant number of clients—preferably a minimum of 25 percent—in your library's segment, because product development will examine the needs of libraries constituting the vital market segment(s) for a vendor.

When a company has more than one product, the one most actively being marketed is the one for which the data is given.

### TABLE 6. GEOGRAPHIC DISTRIBUTION OF INSTALLATIONS

| Vendor | North America | Europe | South America | Asia | Rest |
|---|---|---|---|---|---|
| Berujo | 4 | 0 | 0 | 1 | 0 |
| BiblioMondo | 350 | 1,050 | 0 | 0 | 0 |
| DRA | 1,277 | 36 | 2 | 59 | 0 |
| EOS Intntl. | 105 | 24 | 0 | 7 | 2 |
| ELiAS | 0 | 7 | 0 | 2 | 1 |
| Endeavor | 590 | 51 | 1 | 70 | 1 |
| epixtech | 2,308 | 284 | 28 | 598 | 42 |
| Ex Libris | 12 | 353 | 59 | 1 | 64 |
| Gateway | 166 | 0 | 0 | 0 | 0 |
| Gaylord | 283 | 0 | 0 | 0 | 0 |
| Geac | 191 | 586 | 0 | 83 | 1 |
| Inmagic | 40 | 5 | 0 | 0 | 0 |
| Innovative | 793 | 48 | 0 | 82 | 26 |
| Keystone | 39 | 0 | 0 | 0 | 0 |
| Lib-It | 0 | 110 | 0 | 110 | 0 |
| Open Text | 99 | 130 | 1 | 14 | 1 |
| Sirsi | 764 | 172 | 21 | 29 | 3 |
| TALIS | 0 | 109 | 0 | 0 | 0 |
| TLC | 366 | 1 | 1 | 15 | 1 |
| VTLS | 138 | 115 | 16 | 60 | 5 |

### TABLE 7. MARKET DISTRIBUTION BY PERCENTAGE OF INSTALLATIONS

| Vendor | Academic | Public | School | Special |
|---|---|---|---|---|
| Berujo | 100 | 0 | 0 | 0 |
| BiblioMondo | 0 | 85 | 0 | 15 |
| DRA | 39 | 29 | 28 | 4 |
| EOS Intntl. | 17 | 7 | 1 | 75 |
| ELiAS | 90 | 0 | 0 | 10 |
| Endeavor | 68 | 1 | 0 | 31 |
| epixtech | 25 | 36 | 9 | 30 |
| Ex Libris | 70 | 11 | 0 | 9 |
| Gateway | 3 | 0 | 93 | 1 |
| Gaylord | 5 | 90 | 5 | 0 |
| Geac | 36 | 38 | 0 | 26 |
| Inmagic | 0 | 0 | 0 | 100 |
| Innovative | 56 | 27 | 2 | 15 |
| Keystone | 13 | 26 | 0 | 61 |
| Lib-It | 10 | 45 | 5 | 40 |
| Open Text | 2 | 1 | 0 | 97 |
| Sirsi | 36 | 18 | 7 | 39 |
| Sydney Plus | 0 | 0 | 0 | 0 |
| TALIS | 56 | 42 | 0 | 2 |
| TLC | 30 | 49 | 9 | 12 |
| VTLS | 60 | 20 | 0 | 20 |

**Who has a presence in my part of the world?**

# DEVELOPMENT and SUPPORT

### TABLE 8. STAFF DEVOTED TO CUSTOMER SUPPORT

| Ranking | Vendor | Total Staff Support | Customer Support Ratio |
|---|---|---|---|
| 1. | epixtech | 254 | 1:13 |
| 2. | Innovative Interfaces | 130 | 1:16 |
| 3. | Sirsi | 120 | 1:8 |
| 4. | Geac | 96 | 1:8 |
| 5. | DRA | 85 | 1:16 |
| 6. | TLC | 61 | 1:6 |
| 7. | Gaylord | 55 | 1:5 |
| 8. | Endeavor | 51 | 1:14 |
| 9. | Ex Libris | 37 | 1:13 |
| 10. | BiblioMondo | 35 | 1:40 |
| 11. | VTLS | 24 | 1:14 |
| 12. | TALIS | 19 | 1:6 |
| 13. | EOS International | 18 | 1:8 |
| 14. | Open Text | 11 | 1:23 |
| 15. | Lib-It | 10 | 1:21 |
| 16. | ELiAS | 7 | 1:1 |
| 17. | Gateway | 4 | 1:41 |
| 18. | Keystone | 3 | 1:13 |
| 19. | Inmagic | 2 | 1:22 |
| 20. | Berujo | 1 | 1:5 |

## Post-sale support ratios indicate performance

The number of staff devoted to post-sale customer support and the ratio between that number and the number of installations is a significant predictor of the level and quality of support a library can expect from a vendor. After the tabulation of survey results from more than 80 libraries in October 2000, the data show a direct correlation between the general satisfaction of customers and the support ratio. The most satisfied were the customers of companies with a 1:10 or better customer support ratio. Gaylord, which significantly improved its customer support ratio in 2000, enjoyed a significant improvement in customer satisfaction. Vendors with customer support ratios greater than 1:15 generally did not have a high level of customer satisfaction. Those with ratios poorer than 1:20 had a low level of customer satisfaction. Table 8 shows both the total number of customer support staff and the ratio for each vendor.

Sydney Plus did not provide data.

**How much staff is dedicated to development and support?**

## Staff expansion enriches product development

The rate of product development and its quality depends largely on the number of staff committed to maintenance and development. Companies with fewer than 15 employees tend to have less rich functionality; however, companies that have more than 75 employees have more than one product. Table 9 shows details.

The other companies did not supply data.

### TABLE 9. STAFF DEVOTED TO SOFTWARE MAINTENANCE AND DEVELOPMENT

| Ranking | Vendor | No. Staff 2000 | 1999 | Ranking | Vendor |
|---|---|---|---|---|---|
| 1. | DRA | 142 | 105 | 10. | VTLS |
| 2. | epixtech | 126 | 110 | 11. | ELiAS |
| 3. | Innovative Interfaces | 80 | 75 | 12. | TALIS |
| 4. | BiblioMondo | 70 | na | 13. | Lib-It |
| 4. | Geac | 45 | 62 | 14. | EOS Int'l |
| 5. | Gaylord | 58 | 57 | 15. | Open Text |
| 6. | Sirsi | 51 | 41 | 16. | Keystone |
| 7. | Endeavor | 44 | 33 | 17. | Inmagic |
| 8. | TLC | 41 | na | 18. | Berujo |
| 9. | Ex Libris | 36 | 43 | 19. | Gateway |

# missing **functionality**

Most of the vendors participating in the survey have all of the modules a library is likely to specify, including acquisitions with online ordering; serials control with online claiming; cataloging with authority control and cataloging support interface; circulation with homebound; inventorying; course reserves; patron access catalog; Z39.50 client/server; media booking; information & referral; interlibrary loan; imaging; internet gateway.

If a particular module or major submodule is essential for a library, it should not purchase a system from a vendor that lacks the desired functionality, unless there is a firm general release date committed for the missing feature. Public libraries should be particularly concerned about the lack of a homebound module; academic libraries should be particularly concerned about the lack of a course reserves module.

## Which modules are available?

| No. Staff | |
|---|---|
| 2000 | 1999 |
| 32 | 33 |
| 30 | na |
| 26 | na |
| 15 | na |
| 13 | 9 |
| 7 | 7 |
| 5 | 5 |
| 3 | na |
| 3 | 3 |
| 2 | na |

### Figure 2. Modules and Submodules Not Available, by Vendor

**Berujo:** homebound, online ordering and claiming

**BiblioMondo:** online claiming, Web access management

**DRA:** homebound, imaging

**EOS:** homebound, course reserves, information and referral, media booking, interlibrary loan, Web access management

**ELiAS:** inventorying, homebound, course reserves, information & referral, imaging, interlibrary loan

**Endeavor:** homebound, inventorying

**epixtech:** none

**Ex Libris:** online ordering, materials booking, imaging, information & referral

**Gateway:** homebound, online ordering and claiming, information & referral, Web access management, imaging, Z39.50

**Gaylord:** homebound, online ordering and claiming, course reserves, information & referral, materials booking, imaging, interlibrary loan

**Geac:** online claiming, homebound, Web access management, materials booking, imaging

**Inmagic:** homebound, online ordering and claiming, inventorying, information & referral, materials booking, imaging

**Innovative:** none

**Keystone:** homebound, online ordering and claiming, information & referral, Web access management, imaging, interlibrary loan

**Lib-It:** course reserves, information & referral

**Open Text:** homebound, online ordering and claiming, inventorying, course reserves, information & referral, Web access management, materials booking

**Sirsi:** interlibrary loan

**TLC:** homebound, imaging

**VTLS:** online ordering and claiming, information & referral, Web access management

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