

Conclusions and Observations

The new developments in the open source ILS arena show a group of products offering respectable functionality for libraries. While not suitable for all types and sizes of libraries, there are viable alternatives to specific sectors of the library automation market. It's not a panacea—open source ILS products and the companies that support them include both strengths and weaknesses that warrant objective consideration.

We're past the pioneering days of open source library automation. The realm of open source ILS products no longer belongs only to libraries with advanced technology resources. There are only a small minority of libraries that take on open source ILS implementations completely on their own. The majority of libraries selecting an open source ILS opt to work with a company that provides a complete set of implementation and support services. Though early in the market adoption cycle, open source ILSs are well within the mainstream of the library automation industry.

The emergence of open source ILS products and the companies that create them or provide support has altered the dynamics of the library automation industry. We can expect an increasing number of libraries to move to open source ILS support models. Some of the vendors offering proprietary systems have not necessarily delivered products and service that meet basic expectations or have failed to maintain the trust and confidence of

their library customers; they stand vulnerable to the rising open source ILS movement. However, it is still too soon to see how much this movement will encroach on the dominance of the companies that develop and support proprietary ILS products. Many of these products and companies have delivered highly capable systems, offer high-caliber support, and have earned the loyalty of their library customers.

This report provides basic information that libraries need as they consider their ILS options. A library performing a thorough consideration of a new ILS should examine both open source and proprietary options. This report has focused only on the open source ILS. A thorough process of evaluating an ILS today would not be complete without also weighing the open source ILS products against their proprietary counterparts.

This report provides a snapshot in time of the open source ILS products and companies. The world of ILS is evolving rapidly, even more so than previous trends in library technology. It is possible that new open source ILS products may emerge and new companies will enter the scene. The current products will evolve. The products and companies offering proprietary ILS products will respond to the challenges offered by the open source movement. At the same time, the basic concept of the ILS is changing, fueling new rounds of competition between open source and proprietary products.