



Smart LibrariesTM

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Smarter Libraries through Technology:

The Challenge to Cooperate and Compete

By Marshall Breeding

In my view, the library automation industry, though extremely competitive, maintains a flavor of collegiality. I'm not close enough to other competitive sectors to really know, but I suspect many are considerably more ruthlessness. The organizations that create technology products for libraries must take the sensibilities and values of their customers into account if they want to be successful in the long term. While each organization naturally presents its products favorably and isn't reluctant to mention weak points of its competitors, I rarely come across discourse that I view as intentionally untrue or malicious. In today's tech environment,

libraries are involved with multiple vendors, which have to interoperate and cooperate with each other.

One of the interesting aspects of the library automation industry involves the multiple and overlapping roles among the organizations involved. While some focus on a single product or a single sector of the market, many have much more complex involvement. Examples of organizations with multi-faceted roles abound. We see some companies—ProQuest and EBSCO come to mind—with strategic business in content products as well as the library technology sphere. OCLC acts well beyond its original roles related to bibliographic and resource-sharing services through a wide range of activities within the scope of library automation. Innovative Interfaces, primarily a technology company, entered the bibliographic services arena through its SkyRiver spin-off. Ex Libris, expanding from the libraries that use its strategic automation products, has been able to place its linking and discovery products in libraries that are also customers of its competitors. The Library Corporation, with primary products in library automation and discovery, also offers bibliographic services, including eBiblioFile, which offers rapid delivery of MARC records for e-book collections and is used by many libraries that are not its ILS customers.

This complex array of overlapping products and services results in many

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scenarios where any given library finds itself involved with organizations that compete with each other, but that need to cooperate in some areas, in order to meet the needs of their shared customers. It's increasingly less tenable for companies to build solid walls against their competitors. Rather, they often need more permeable boundaries, to be open to collaboration in one product front even if that means yielding some ground in another. The challenge often lies in finding the areas of mutual advantage in broad strategies rather than within each narrow product category.

We can see many examples of cooperation among competitors. Though, as a nonprofit, OCLC does not view itself as a commercial competitor, it has extensive relationships with libraries all over the world through its varied products and services that increasingly overlap with those of for-profit providers. How OCLC may or may not cooperate with commercial companies can be an important issue, especially in regard to WorldCat. We see a number of partnerships with OCLC, such as that formed recently with Ex Libris, providing access to the WorldCat Search API through Primo, even though WorldCat Local competes with Primo in the discovery services market. EBSCO partners with several providers of discovery interfaces to provide access the EBSCO Discovery Service index, including SirsiDynix, Innovative, VTLS, and others. It's beneficial for libraries to be able to use a competing discovery interface and to subscribe to the index that they prefer. The Library Corporation supplies libraries with MARC records through its eBiblioFile service, even if they use a competing ILS.

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As APIs (application programming interfaces) become more widely offered, libraries will increasingly want to exercise them in ways that interconnect diverse systems and services among multiple providers, including those that compete with each other. In the growing ecosystem of APIs, I think that it will become increasingly common for companies to enable access by third-party commercial organizations, including those that offer competing products.

It is through this dynamic of simultaneous cooperation and competition that I see the withdrawal of the lawsuit between Innovative Interfaces and OCLC. Sierra competes with WorldShare Management Services. SkyRiver competes with OCLC's bibliographic services and Encore with WorldCat Local. Yet, a large number of Innovative's customers are also members of OCLC. As long as the lawsuit continued to languish in the court system with no resolution in sight, it held a cloud over two very key companies in the industry. While the lawsuit itself did not legally preclude cooperation between the companies, it reflected a tone of hostility that made any practical cooperation between the two organizations unlikely. While no specific plans or projects were announced, the withdrawal of the lawsuit should clear the air at least somewhat and open the possibility for more cooperation between these two competitive organizations.

Innovative Interfaces Absorbs SkyRiver and Withdraws Lawsuit Against OCLC

In a major shift in strategy reflecting a more collaborative style of its new ownership and management, Innovative Interfaces has withdrawn the lawsuit it filed against OCLC in July 2010. SkyRiver Technologies, the sister company and lead plaintiff of the suit, has been absorbed into Innovative Interfaces, which will integrate the SkyRiver cataloging service into its product offerings.

SkyRiver Technology Solutions was established by Jerry Kline, then owner of Innovative Interfaces, in September 2009 to provide cataloging services to compete with OCLC at lower costs. Complications arose when libraries using SkyRiver's cataloging service, including Michigan State University, claimed that they were charged higher fees than expected when they

wanted to load the SkyRiver records into the OCLC WorldCat database to support interlibrary loan. The complaint filed by SkyRiver and Innovative mentions this claim and other issues as the basis of the lawsuit.

On July 28, 2010, SkyRiver Technology Solutions and Innovative Interfaces, Inc. filed a lawsuit in the United States District Court Northern District of California against OCLC asserting that OCLC was operating as a monopoly in multiple sectors, including that of bibliographic metadata, interlibrary loan, and library automation, and was engaging in anticompetitive business practices. While the complaint mentioned OCLC's non-profit status, this issue was not its primary focus.

The case was active in the courts with many filings made through October 2010, when the case was transferred to the United States District Court for the Southern District of Ohio. Another set of filings were made through April 14, 2011, when OCLC's attorneys issued a motion to dismiss the charges. This motion has been awaiting a ruling of the court since that date.

See the list of the filings related to the SkyRiver vs. OCLC case on Library Technology Guides at <http://www.librarytechnology.org/web/breeding/skyriver-vs-oclc/>.

Like Innovative, SkyRiver was owned by Jerry Kline, and it was part of JMI Equity and Huntsman Gay's acquisition of Innovative Interfaces. Though organizationally independent, the company operated from space leased in Innova-

tive's Emeryville headquarters and contracted with Innovate for technology infrastructure and other services. As a result of a recent company reorganization, SkyRiver is now folded into Innovative Interfaces and will no longer exist as a separate company. Leslie Straus, president of SkyRiver since its establishment, has left the company.

The vision of offering a competitive cataloging alternative to OCLC remains intact. SkyRiver's cataloging services will continue as an offering of Innovative Interfaces. Tom Jacobson, Director of Resource Sharing, whose portfolio also includes INN-Reach, will oversee the SkyRiver cataloging services within Innovative.

Since the filing of the lawsuit, Innovative Interfaces has undergone change of ownership and executive management. Jerry Kline, believed to be the

primary force behind the lawsuit, is no longer directly associated with Innovative or SkyRiver. The new leadership at Innovative mentions an opportunity to establish a positive relationship with OCLC as a major reason behind dropping the suit.

Within the library industry, companies can have complex relationships where they compete on some fronts and cooperate on others. The lawsuit meant a cloud of uncertainty for OCLC and a hostile business environment between it and Innovative. The withdrawal of the lawsuit opens up more of a possibility for Innovative and OCLC to find areas of collaboration, while still competing in the area of cataloging services. The statements issued by both OCLC's Jay Jordan and Kim Massana, Innovative Interfaces CEO, reflect a more conciliatory and cooperative approach.

Axiell Group Acquires Adlib Information Systems

In a move that consolidates two companies that produce systems for managing museum, archive, and library collections, Axiell Group has acquired Adlib Information Systems. Axiell offers a variety of library automation systems used in Scandinavia and the United Kingdom as well as Axiell CALM, for the management of archive and museum collections. Adlib's products find use primarily in museums, archives, and special libraries. The acquisition of Adlib, a company with particular strengths in the museum and archive automation sector, significantly expands Axiell's reach, especially into the museum sector and also into many new geographic areas. While it has not yet ventured into the North American library automation market, Axiell, with its growing arsenal of products, warrants attention as a major, global contender with the potential to expand into new geographic regions.

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Although the financial transaction closed on March 1, 2013, the operational merger of Adlib into Axiell will not take place until 2014. Adlib was privately owned by Bert Degenhart Drenth, who served as its Chief Executive Officer and Marijke van der Kwartel, its Chief Financial Officer. Both will join Axiell and continue with their leadership of Adlib.

This acquisition is the latest in a series of business acquisitions that has built Axiell into the largest company involved in library and archives automation in Europe, and one of the largest in the world. In an earlier phase, between 2001 and 2007, the company's acquisitions

brought together all the major competitors for public library automation systems in Denmark, Finland, and Sweden. In 2008, it acquired DS, the company that developed the OpenGalaxy system used in many public libraries in the UK.

Axiell Group Corporate Background

Axiell, though not well known in the United States, is a major supplier of automation systems to libraries, museums, and archives in Scandinavia and the United Kingdom. Prior to the acquisition of Adlib, Axiell employed just under 200

personnel, which ranks it as eighth largest globally, behind Ex Libris, Civica, SirsiDynix, Follett Software Company, Innovative Interfaces, Serials Solutions, and The Library Corporation. In 2011 the total revenue for the company was €37.7 million Euros or just over \$49 million, which would place Axiell Group behind Ex Libris, Innovative Interfaces, SirsiDynix, and Follett Software Company. The acquisition of Adlib will expand annual revenue by about €3.5 million or \$4.5 million.

Axiell Group includes four subsidiary companies, comprising four groups addressing specific countries in which the company operates:

- Axiell Sweden
Axiell Sverige AB, responsible for LIBRA.SE, BOOK-IT and SkolArena.
- Axiell Denmark
Axiell Denmark A/S, responsible for DDElibra
- Axiell Finland
Axiell Finland Oy, Responsible for Axiell Aurora and LIBRA.FI
- Axiell UK + Ireland
Responsible for OpenGalaxy (Former DS company), currently used in about 70 library systems in the United Kingdom.

and another division responsible for its archives and museum product:

- Axiell CALM
Axiell Calm for Archives and Museums

Customers include more than 700 public libraries in Nordic Countries, 70 library services in the United Kingdom, and more than 3,000 schools using Axiell's School Library systems.

Through its succession business acquisitions, Axiell has responsibility for a number of integrated library systems, which include:

- **Origo**, developed by Akateeminen Tietopalvelu ATP Oy, acquired by Axiell Group in December 2007.
- **PallasPro**, an ILS developed by TietoEnator Libraries Oy, acquired by Axiell in February 2007, and used exclusively in Finland.
- **BOOK-IT**, the successor system of the BTJ-2000 system, developed by BTJ Systems, which was acquired by Axiell in 2001.
- **DDElibra**, ILS developed by Axiell for public and school libraries in Denmark.
- **LIBRA.FI**, ILS developed by Axiell for libraries in Finland.
- **LIBRA.SE**, ILS developed by Axiell for libraries in Sweden.

- **FreeLib**, a library system for schools and school libraries in all sizes.
- **OpenGalaxy PLUS**, originally developed by a company based in the United Kingdom, called DS, acquired by Axiell Group in April 2008. OpenGalaxy continues to be used by 68 library services in the UK, including the London Libraries Consortium. This system has not been adopted outside of the UK.
- **Aurora**, a relatively new product created by Axiell as a successor to its ILS products offered in Finland, which include Libra.FI, Origo, and PallasPro; it is available to the libraries operating these products as a standard upgrade without additional licensing costs.

Axiell has followed a rather soft product integration strategy as it has brought new companies and their respective products into the fold. In most cases, it has continued to develop and maintain the products of the acquired companies. This strategy causes less disruption, respecting the often country-specific practices and standards embodied in these established automation systems. An example of Axiell's product integration is seen in Finland, where a new product Aurora, as noted above, has been developed to supersede the three existing products serving that market.

Axiell's product integration strategy has focused on customer-facing interfaces, positioning **Axiell Arena** to be coupled with any of its management products, including those for library and archival collections. Arena not only serves as a discovery or search interface, but offers a wide range of features to provide information about and access to the organization's services so that it can function as its complete Web presence. For libraries that have both archives and traditional collections, Arena provides unified access to both types of materials. Axiell CultureNet, recently launched at the Roskilde Libraries in Denmark, exemplifies Arena's capacity to provide access to a blend of library and archival collections. Arena was initially created collaboratively by DS and Axiell prior to their merger.

Axiell Calm is used in about 400 archives and museums, primarily in the United Kingdom. The product was originally developed with DS beginning around 1995 and has become a strategic product of Axiell following the merger. In July 2011, the company launched a new subsidiary with responsibility for CALM and the archives and museum market. Malcolm Howitt serves as Managing Director of the Axiell CALM.

The concept "MerÖppet", Open Library or "24/7 Library" allows access to library facilities even after staff have gone home. Worldwide, about 80 Open libraries are in operation, and results have been positive.

ADLIB Information Services Corporate Background

Adlib is based in Utrecht, The Netherlands with offices in Berlin, Germany, and Swindon, United Kingdom, employing around 35 personnel. The company products are used in 1,600 organizations spanning 30 countries. Prior to its acquisition by Axiell, Adlib was privately owned by Bert Degenhart Drenth, company CEO, and Marijke van der Kwartel, its CFO.

ADLIB Information Systems has 1,600 clients in 30 countries. It offers automation systems, based on the same underlying technology, tailored for museums, libraries, and archives, packaged as Adlib Library, Adlib Museum, and Adlib Archive. Each can be used individually, or for organizations with multiple types of collections, one or both of the other products can be integrated together. The optional Adlib Internet Server provides Web access to the organization's collections.

As one of the veteran companies of the industry, Adlib has been involved with providing automation software to libraries, museums, and archives through many generations of technologies.

ADLIB had originally created its products based on its proprietary database management system, which transformed from its original development on Primos minicomputers, to Unix and DOS, and to client-server technologies based on Microsoft Windows in the mid-1990s. The days of proprietary databases have passed, with both open source and commercially licensed database technologies readily available. In October 2012, Adlib announced that it would discontinue use of its own CBF proprietary database in favor of databases from Microsoft or Oracle. For small installations, Microsoft SQL Server Express is included without cost; larger installations would need to license the support-

Corporate Chronology

1978: ADLIB (Adaptive Library Management and Information System) library automation system was developed to operate on Prime minicomputers under the Primos operating system by the Lipman Library Management Resources Limited of Maidenhead, England, later known as LMR Computer Services.

1985: Lipman Library Management Resources merges with Databasix.

1986: Databasix Computer Systems subsidiary launched in the Benelux, headed by Bert Degenhart Drenth.

Carlton Communications acquires Databasix.

1991: Bert Degenhart Drenth led a management buy-out of the company from Carlton Communications, which was named Databasix Information Systems after the transaction.

August 1998: ADLIB Information Systems acquires SAILS (Swets Automated Independent Library System) from Swets & Zeitlinger. Swets, a major serials subscription service for libraries, had created a serials control module that it planned to offer as a full integrated library system in the mid-1980s. (See *Library Systems Newsletter* Vol. 4 No. 7, July 1984). SAILS was never completed as an integrated library system, but was used by many libraries as a stand-alone serials control system. ADLIB subsequently integrated the functionality of SAILS into the ADLIB serials module.

January 1999: Databasix Information Systems renamed to ADLIB Information Systems, taking the name of its flagship product as its primary brand.

July 1999: ADLIB Information Systems acquires ROTA and Ocelot automation system from Reekx, which were used in about 100 libraries.

March 1, 2013: Axiell Group acquires ADLIB Information Systems.

2014: Consolidation of ADLIB into Axiell Group planned

ing database technology that matches their requirements. Adlib is not alone in phasing out proprietary database. Innovative Interfaces, for example, had created its own proprietary database for its INNOPAC and Millennium ILS products, which has been replaced by PostgreSQL in Sierra.

Databasix originally focused on library automation with its ADLIB ILS. In 1996, the company launched ADMUSE, a version of the software for the manage-

ment of museum collections. Over time the company has become well known in the museum and archives management arena, but it continues to have a strong presence in special libraries, which represents more than half of its revenue.

Axiell Expands a Strategic Market

Axiell Group continues to grow through the acquisition of companies, each of

which expands not only its overall size, but also its reach into new geographic areas and product markets. With the acquisition of Adlib, Axiell enters markets in a more diverse set of countries. Adlib currently has customers in the United Kingdom, Australia, Asia, the Middle East, and the United States. It also amplifies its penetration into museum and archives.

Given Axiell Group's historic gentle pace in regard to the integration of its companies and product lines, we can expect little immediate disruption for the existing Adlib customers. As part of Axiell, Adlib gains access to the resources

of a larger company and opportunities to expand its customer base beyond what it might be able to accomplish as a small company. In the longer term, with the combined resources of Axiell CALM and Adlib Information Systems, Axiell is positioned to become more of a dominating force in the realm of archives management. A vast number of libraries also have responsibility for archives, cultural collections, or other types of special collection. Axiell's expertise and products in both of these areas has the potential to open up new business opportunities.

Library Technology News

OCLC and ProQuest collaborate to enhance library discovery

Ann Arbor, MI, and Dublin, OH, February 28, 2013—ProQuest and OCLC are launching a far-reaching data exchange program that will enhance the library discovery experience for users of OCLC's WorldCat Local service, ProQuest's Summon service, the full-text of ProQuest Central and ebrary e-books. The program shares metadata across widely used library resources, enriching the discoverability and comprehensiveness of all the services.

Once the data exchange is completed, libraries that subscribe to both WorldCat Local and ProQuest Central or that own any ebrary content will be able to discover ProQuest records and access associated content through the WorldCat Local interface. Further, the exchange will enhance the discoverability of catalog records in the Summon service, creating the potential for libraries to view other institutions' WorldCat holdings information within the Summon experience.

More than 100 A&I databases now indexed in the Serials Solutions Summon service

Seattle, WA, March 7, 2013—Serials Solutions, a ProQuest business, announced today the Summon discovery service now includes content from more than 100 abstract and indexing (A&I) databases – including nearly 90 ProQuest databases. A&I content in the Summon service is leveraged through a unique match and merge technology that combines different types of data and information from multiple sources creating a single record optimized for discovery. For mutual subscrib-

ers, this approach exposes A&I resources to more users, directs researchers to full text when available, and maximizes the value and usage of A&I content for libraries.

Match and merge technology combines, normalizes and corrects from multiple sources full text and metadata, such as abstracts, subject terms, thesauri and controlled vocabularies, citation counts and enrichment data. Bringing together this information enhances relevancy and increases discoverability of content, whether a user searches with natural language queries or database-specific controlled vocabularies.

The Summon service supports discovery of A&I databases regardless of where the library purchased the database or which provider hosts it. This approach ensures that relevant results are not biased toward any particular provider or vendor. A&I content indexed in the Summon service spans diverse disciplines and includes databases such as the MLA International Bibliography, Thomson Reuters Web of Science(SM), HAPI (Hispanic American Periodicals Index), SveMed+ and L'Annee philologique.

Cengage Learning launches partnership with the Smithsonian Institution to bring Smithsonian treasures into the library and academic space

Farmington Hills, MI and Washington, D.C., Feb. 28, 2013—Gale, part of Cengage Learning and a leading publisher of research and reference resources for libraries, schools and businesses, and the Smithsonian Institution today announced a licensing agreement to distribute Smithsonian assets into the library and academic space.

The Smithsonian Institution is the world's largest museum and research complex, with 19 museums, 9 research centers and more than 140 affiliate museums around the world. The complex houses nearly 137 million objects, works of art and specimens and its facilities see nearly 30 million visitors per year. Under the agreement, Cengage Learning will have access to the complete archives of Smithsonian Magazine and Air and Space magazine, as well as collections covering American history, science, world cultures and more.

As part of this partnership, Cengage Learning will have rights to develop Smithsonian branded products created for the library and academic markets utilizing Smithsonian assets. Immediate plans in the library

space include the creation of a digital archive of the complete back files of both Air and Space magazine and Smithsonian Magazine, and will incorporate new issues on an ongoing basis. The product will take advantage of Gale's market-leading application for digital primary sources, with tools to support new forms of discovery and use of Smithsonian content.

UCLA Library launches transformative broadcast news platform

Los Angeles, CA. March 4, 2013--Comprising digital recordings of hundreds of thousands of American and international TV news programs from 2005 to the pres-

ent and featuring capture, search and playback capabilities that go beyond those of other public news archives, the UCLA Library's newly launched Broadcast NewsScape opens up transformative possibilities for teaching, research and publication.

The technology developed for the platform captures closed-captioning streams, on-screen text and detected visual shapes, along with video feeds, which can be searched or browsed. Now in its initial launch phase, Broadcast NewsScape is accessible at <http://newsscape.library.ucla.edu> to users on the UCLA campus or those connecting from off-campus via the campus network. Project managers hope to launch the platform to the entire University of California scholarly community in the future.



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