

Company strikes new
partnerships with library
automation vendors

EBSCO FOCUSES ON DISCOVERY

By Michael Kelley

In recent months, EBSCO Publishing has been deepening and extending partnerships with major vendors of library management systems worldwide so that it can remain focused on what it considers a core competency—discovery.

To that end, the company is planning in 2013 to implement ILS integrations (first announced in June 2012) with OCLC, SirsiDynix, and Innovative Interfaces (III), even though those ILS companies also offer competing discovery products. In addition, EBSCO has subsequently struck deals with 12 international companies (as of early January) and is in negotiations with about two dozen more, according to company officials.

EBSCO's rationale, according to top EBSCO executives, is that no resource management system has ever been the clear global leader and this is unlikely to change. So, for a discovery service to flourish, it has to work seamlessly in as many library environments as possible, regardless of which ILS or next-generation library services platform (LSP) a customer has chosen.

Tim Collins, EBSCO's president, says the partnerships mean that all the customers of these ILS vendors will be able to continue with their preferred library management system and still subscribe to EBSCO Discovery Service (EDS).

"We feel we've made the right decision here," Collins says. "We take these partnerships very seriously and are committed to making them work."

Merging with EDS

EBSCO's partners, all of whom have collaborated previously with EBSCO, say attempting to merge seamlessly with EDS is worth the effort, although at first blush it might appear to undercut their own discovery product, since partnering allows the companies to provide expanded services and content to customers and gives libraries more choices.

For example, III and SirsiDynix do not have their own comprehensive index like those that underpin web-scale discovery systems. Now they will have access to the EDS index.

"EBSCO was the first and only vendor to be willing to offer its preindex in our interface via an API [application programming interface], collaboratively, based on a mutual interest in delivering the best and most complete solution that would work for users," says John McCullough, III's vice president of product management, referring to the EDS unified central index. "We have not had discussions of this nature with other vendors as of yet as we've been focused on this effort."

III offers its own discovery platform (Encore), an LSP (Sierra),

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and an ILS (Millennium). According to III, more than 320 library systems (over 1,000 libraries) have committed to Sierra.

McCullough says having access to EDS's unified index will expand the quality and amount of content available to Encore users and that Encore users will be able to search EBSCOhost databases via the Encore interface, creating what he describes as "a uniquely powerful article search experience."

It will likely result in a scaling back of the use of Encore Synergy, III's article discovery component, but Encore is still in place, and libraries can continue to choose Synergy to complement EDS, according to McCullough.

In the case of SirsiDynix, the integration revolves around the company's eResource Central next-generation electronic resource management system (ERMS), which has been in development for two years and is slated for general release in early 2013. The EBSCO deal was the first of several that SirsiDynix has been striking (ow.ly/gPFr2).

"Together with EBSCO, when we think about integration, we think in terms of centralized sign on and authentication, integrated search results that seamlessly display both physical and electronic content, one-click to access e-content, a consistent interface and other key usability features," says Eric Keith, the vice president for global marketing, communications, and strategic alliances for SirsiDynix. "We're building an integrated approach to make the user experience simple and powerful."

As a whole, various officials say that if the partnerships create a better user experience, it will also make a more compelling case for discovery in the library—a growing necessity as questions increasingly are raised (from people like Lorcan Dempsey of OCLC or Simone Kortekaas at the University of Utrecht, the Netherlands) about whether libraries are losing their role in the discovery of information and whether in a networked world there is even a need for proprietary discovery interfaces.

"We, libraries and library vendors, are competing with free websites for the attention of end users," says Collins. "As an industry, we need to recognize this and work together to provide solutions that compel our users to continue to use them. This is why we are looking for partnerships with additional library vendors."

In addition to OCLC, SirsiDynix, and III, EBSCO has, so far, struck deals with aStec (Germany), CALYX (Australia), Bibliothekservice-Zentrum Baden-Württemberg (Germany), Futurenuri (South Korea), L.A. Information Technology, Capita Talis (England), Civica (Australia), PRIMA Informatica (Brazil), Logica Czech Republic, Mirtech Inc. (South Korea), Hyweb Technology (Taiwan), Bookhouse Culture & Sci Tech Co. (Taiwan).

A different approach

EBSCO is the only discovery/content provider that does not offer an automation project of its own, but Collins says the company had extensive discussions (including with 19 librarian advisory boards) and decided against it.

"We realized that there are already many ILS vendors, and the addition of yet another would further segment the market," Collins says. "Further, we see 'discovery' as more critical to our mission than ILS, and we felt that the development of our own ILS would make partnerships with existing ILS vendors close to impossible."

Instead, EBSCO officials say they are focused on making EDS as interoperable as possible. Presently, 73 libraries (60 systems) are live with OCLC's WorldShare Management Services (WMS), and, in terms of academic and public library installa-

tions, SirsiDynix is the leader in ILSes, closely followed by Ex Libris and then III.

"We think it is better for EBSCO, and for libraries, that we partner with ILS companies rather than compete with them," says Michael Gorrel, EBSCO's executive vice president and chief information officer. "We think we can bring better products to market by focusing on what we do best—discovery."

Once these partnerships are implemented through the EDS API, the search engine and content of EDS is provided through the interface of the ILS (as is the case with SirsiDynix), including integration with the catalog (placing of holds, etc.). A library can also choose to use EBSCO's interface as the front end.

EBSCO's strategy differs from the emerging LSP approach being pursued by some of its main competitors, which promises a one-stop shopping solution: an internally integrated suite from a single vendor based on a single knowledgebase that serves both discovery and management. A powerful feature is shared data and analytics that can drive services and library administration decisions.

The major LSP products either on the market or in development are Alma from Ex Libris, Intota from Serials Solutions, WMS from OCLC, with whom EBSCO has partnered, and Sierra from III.

"As more libraries adopt next-generation solutions, we've seen a clear trend of pairing discovery and resource management solutions from the same vendor," says Gilad Gal, the director of product management for Ex Libris.

Gal says this was the result of several factors, including "the benefit that many libraries find in choosing a full solution over trying to piece together a range of different solutions. This indeed has been our experience with most all of our new Alma customers—over 100 to date."

Serials Solutions, a unit of ProQuest, offers the Summon discovery service and has also opted to develop Intota, its next-generation library services platform. John Law, the vice president of discovery services, says EBSCO has to strike these partnerships to stay competitive should LSPs be broadly adopted.

"If they are not there, what would happen to their business?" he says. "They are going to be left out of a pretty good part of the market, and it leaves them vulnerable."

In a review of Intota, Carl Grant, a consultant with CARE Affiliates, LLC, writes that "Overall, Intota is a total reconceptualization of library management systems providing functionality focused on selection, acquisitions, description (cataloging), fulfillment, a knowledgebase, and discovery."

EBSCO's Collins says libraries should choose which vendors they want to use for all these various library functions. Collins added that EBSCO offers resource management tools such as A-to-Z with LinkSource and ERM-Essentials and that the company is integrating A-to-Z with LinkSource (with its knowledgebase) into EDS.

"So, our discovery customers can use the EBSCO knowledgebase as their repository for managing their holdings information, but we don't require that they do this," he says. "If customers want to continue to manage their holdings in another vendor's system, we facilitate integration of these holdings into EDS."

Collins says that if customers want to purchase an LSP, "We think they should have the ability to integrate the EDS discovery tool into their solution."

According to Grant, the partnerships EBSCO has been striking make sense but were a short-term "marriage of products that have holes that can be quickly filled by these pairings."

“It’s OK for now, recognizing that the new library services platforms don’t have the same full range of functionality as the old systems, but the new ones are going to bring the integrated backroom workflows that enable libraries to devote more staff to user-facing services that are critical to the future,” Grant says.

Grant is a past president of Ex Libris North America, a past president and chief operating officer of VTLS (which is developing the Open Skies library services platform), and a past vice president at III.

EBSCO’s partnerships include WMS, a next-gen platform, which includes WorldCat Local as the discovery layer. OCLC officials say they expect most libraries will want to use this configuration—as all do today. But under this arrangement with EBSCO, the library has the option to use EDS as the discovery layer for WMS.

“We offer the WorldCat Local discovery service for libraries that wish to use it, but we are also happy to work with other discovery service providers,” says Chip Nilges, OCLC vice president, business development.

Nilges says the EBSCO and OCLC engineering teams are working together closely on the integration with WMS, which is a first for WMS.

“The integration is designed to ensure that the patrons using EBSCO Discovery Service in combination with WorldShare Management Services have a high-quality user experience with respect to key functionality, including access to full text, patron accounts, and circulation interoperability,” he says.

A knowledgebase challenge

One challenge is that if a library chooses a discovery service from one vendor and a management system from another, then the library would have to maintain two knowledgebases (list of holdings).

“While it will be technically possible to mix and match discovery services from one vendor with library services platforms from another, the work involved to integrate them and synchronize knowledgebases will be worthwhile only in special circumstances,” wrote Marshall Breeding, the founder of Library Technology Guides, in the December issue of *Computers in Libraries*.

However, as Collins says, EBSCO does not require that EDS users work with the EBSCO knowledgebase, and the company has gotten around this redundancy problem by developing tools to synchronize automatically information from knowledgebases provided by other vendors.

“Many of our discovery customers keep their electronic holdings information in Ex Libris’s SFX [knowledgebase] and use SFX as their link resolver. While we have our own products in these areas, we realize the need to be interoperable, and we want to give our discovery customers choices,” Gorrell says.

Gorrell says EBSCO can’t expect EDS customers to cancel SFX, but EBSCO has developed a way to reuse the information in SFX so that it is in sync with EDS.

At the University of Chicago, for example, EBSCO has loaded the library’s holdings data into EDS and automated all updates. As

a result, the library can keep SFX and integrate it into EDS without any ongoing staff involvement, and the library’s users get an accurate representation of what content they can access directly.

“While EBSCO does have a competing product [to SFX], switching products always incurs extra overhead and would seem unnecessary on the face of it,” says Tod Olson, the systems librarian at the University of Chicago Library. “We will change that part of our infrastructure when we decide it is in our best interests.”

Olson explains that SFX has an export facility that supports the XML format used by Google Scholar for importing library holdings information.

“So rather than ask customers to switch OpenURL providers—which would also have the smell of vendor lock-in—

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EBSCO has provided a drop point where we can upload our electronic holdings in the Google Scholar format, EBSCO’s servers will notice the new data and automatically import it,” Olson says.

“Because EBSCO provides a way to upload that holdings information, as long as we can export our holdings information in a form they can import it doesn’t matter what system we maintain it in,” Olson says. “We can still make full use of the holdings-based features that they provide without having to buy in to their entire product line.”

Gal of Ex Libris says the company supports such interoperability, through the development of standards and open interfaces to its products, such as SFX.

“Moreover, we believe that the customer, not Ex Libris, owns its holdings and has the full right and tools to export them to any discovery layer,” Gal says.

He says that Ex Libris has developed numerous integration options, such as with content indexes from WorldCat and EBSCOhost, albeit not with EDS, though neither company has ruled out such an integration in the future.

Library consultant Grant writes that LSPs do pose a risk of vendor lock-in. “As a librarian I’m terribly uncomfortable with a library locking themselves into buying so much of their content, assets and tools from the same supplier,” wrote Grant. “This incurs a real risk that I think way too many librarians are simply guilty of ignoring—and at considerable peril.”

In a subsequent interview, Grant also says EBSCO’s tying catalog enhancements to its interface and not providing all enhancements through APIs (or requiring an additional API call) also “puts libraries in a very disadvantageous place in the information delivery value chain.”

Yet Gorrell of EBSCO says these partnerships were evidence that the company wanted to provide choices and work with as many vendors as possible.

“I believe our partners have come to the same conclusion that we have,” Gorrell says. “They realize that partnering offers their customers more choices, and that is good for customers,” he says, adding that EBSCO has also developed code for the open source VuFind community. ■