

Appendix 2 - Vendor Profiles

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A2.1 UK HE Market Overview

The LMS study identified vendor market share in UK HE as follows

Market Summary	Number of customers	% share
Total number of HE institutions	183	100
Axiel	1	0.55
ExLibris (incl. Endeavor)	43	23.50
Infor (formerly Geac)	3	1.64
Innovative Interfaces	33	18.03
ISOxford	6	3.28
OCLC Pica (formerly FDI)	3	1.68
Payne Automation	1	0.55
SirsiDynix	41	23.40
Softlink	1	0.55
Talis	42	22.95
VTLS	1	0.55
Unknown	8	4.37

Therefore just four vendors enjoy a closely balanced 88% market share

Market Summary	Number of customers	% share
Total number of HE institutions	183	100
ExLibris (incl. Endeavor)	43	23.50
Innovative Interfaces	33	18.03
SirsiDynix	41	23.40
Talis	42	22.95
The four UK HE market leaders	159	87.88

Within the scope of the JISC & SCONUL LMS Study, Ken Chad engaged in dialogue with Directors and senior managers from these four vendors in autumn 2007.

We gratefully acknowledge this significant input from the vendor community, which is reported here with permission.

Note therefore that *text in italics* in this Appendix indicates content taken directly from the vendor interviews, the voice of the vendor.

A2.2 ExLibris

Interview with:



Oren Beit-Arie, Chief Strategy Officer

Mr Beit-Arie, who joined the Group in 1988, is one of the primary developers of the OpenURL standard and has been deeply involved in the design of ALEPH 500, the creation of MetaLib and SFX, and the overall research activities of the Company. Mr Beit-Arie holds a BSc in Mathematics and Computer Science from The Hebrew University of Jerusalem and an M.A. in Theoretical Linguistics from Tel-Aviv University.

Additional information:



Julie Booth, Managing Director, Ex Libris (UK) Limited

Ms Booth joined the Group in 2000 as UK Sales Manager and was subsequently promoted to the position of President of Ex Libris (UK) Limited. Ms Booth has concluded major agreements with customers in the UK, including the British Library. Prior to joining Ex Libris, Ms Booth was a senior sales consultant for Dynix.

A2.2.1 The Business

(Adapted from Breeding 07⁹³ with changes and additions)

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Company Profile

ExLibris was acquired by Francisco Partners, a private equity firm based in Menlo Park, CA, in July 2006 for \$62 million. The company went on to purchase Endeavor in December 06

ExLibris is the largest global LMS company focused almost exclusively on academic research and national library automation and the second largest overall, behind SirsiDynix. The addition of Endeavor libraries concentrates about half its customer base in the United States, and the combined company has software in 80% of Association of Research Libraries (ARL) member institutions.

⁹³ 'An Industry Redefined. Private equity moves into the ILS, and open source support emerges. Automated System Marketplace 2007'. By Marshall Breeding. Library Journal 1st April 2007.
<http://www.libraryjournal.com/article/CA6429251.html>

The scale of the operation (2006)

Global revenues in the £30m-£35m (\$60-\$70) million range

Global staff:

410

UK HE Annual revenues

3.5m (Estimated). (*'About right'* Julie Booth UK MD)

Estimated as follows: Talis has £3.3m (estimated from 2006/06 accounts from Companies House) from 23% market share of UK HE. ExLibris also has 23% market share. A reasonable revenue estimate is 3.5m as there are higher revenues from new business and MetaLib/SFX add-on sales. Annual maintenance revenues are probably a little less than Talis, which has a much more mature customer base

UK based staff

15

Presence in UK HE

The now combined ExLibris and Endeavor has the largest share (just over 23%) the UK HE market –but only just above Talis and SirsiDynix

A2.2.2 Strategy

Current trends

In principle, we look at general trends then map them to our domain (national, academic and research institutions). It's vital to look beyond library space—in terms of technology and also information access & delivery landscape. So we adopt and integrate the wider trends into the library domain

User needs

For many years we, as a library vendor, focused on the needs of the library and its staff. This changed a few years ago when we realized that users are underserved in the then-current library services offerings. This led us to put a focus also on user-centric solutions. In simple terms it's about putting the user in the centre and building solutions around their needs and expectations. As users' needs and expectations are determined and derived from their overall Internet experience, the solutions that we design should be on par with other, non-library, on-line services.

Perhaps the most important aspect of that is the fact that most users are not very likely to use and utilize systems/solutions that require them to learn query languages, thesauri or classification schemes. They are also not too interested in internal library structures and collection types – e.g. whether a particular resource is held locally or accessed remotely or whether it is available to them through paid subscription or through open-access arrangement, etc. We need to 'shield' the users from internal library decisions.

At the same time, users do need sophisticated, intelligent and accurate tools to help them achieve their goals. In most cases, in our domain, the users goal is to use (access, download, cite) a scholarly resource (we call it Get-It!). Finding it is just a means to an end. Getting it and using it is typically the goal. And in most cases, users would prefer to be able to do all this in context of their work – be it as a learner or a lecturer or a researcher – which means that users expect those services to be fully integrated with their ‘native’ environments – be it their LMS, RMS, or even their desktop suite of applications (e.g. MS office). Another important aspect of that is that users are typically indifferent to where they should search. They certainly don’t want to navigate through a dozen different indexes and/or repositories of content...

In order to best address user needs, ExLibris implemented and supports a de-coupled architecture: de-coupling user services from back-office, library management services.

Trends in how staff interact library systems

A key need is for integration with other corporate systems and a need for management information. Past focus was mostly about librarians then switched to user but it NOT either/or The next generation people are getting more and more involved in libraries so library staff need same engaging tools. They need to get more and more tasks done but not with more and more people –so it’s about streamlining.

Influence of Web 2.0

Perhaps the two most important aspects that we’ve identified are:

- 1. User contribution: users are no longer only passive consumers of content. They are also active contributors. Moreover, enticing them to do so adds significant value to the whole community of users*
- 2. Mash-up opportunities: building systems in web 2.0 “spirit” enables mash-up of services that increases the value and the ability of library services to better integrate with user spaces*

It is important to note that these come to play both in front-end, user services as well as in back-office, library management services.

Interoperability

End users-researchers educators and learners-- have their own user spaces where they spend most of their time. They may use a variety of social network tools, learning and teaching applications, research tools etc. So in terms of library services we need to get out of silos and embed services. The user’s experience doesn’t begin or end in a library space---the library is just part of the process. We won’t have total ownership of the information space. So have to work with other players including Google Scholar, MSN, Windows Live Search Academic, and social spaces like Facebook etc. To embed service in these environments and spaces is strategic for ExLibris.

We are probably at the geek phase at the moment so there so there is a need for some ‘hands-on’ technical skill —but benefits need to be to the general audience –hence the community approach. Developments are available to everyone in the ExLibris community.

The continuing value of library and its community

There are a lot of unique resources in institutions so there is still a big role in making these available—through remote access, physical copy, digital etc. Libraries are in a good position to understand their (closed) user community needs and match specific services to them. We believe that one of the most important value propositions of libraries is through offering contextualized services. Libraries can fine-tune a tool/service for their community. ExLibris will be active in helping customers integrate their library services with other services and approaches. Web 2.0, SOA and adherence to standards are some of the key components to enable the degree of openness and extensibility that is required to achieve these context specific needs.. This may involve in more consulting services.

ExLibris see themselves as having responsibility for the whole process even though they don't have all the components—it means working beyond simply the APIs to get involved in the actual mashing up of services. So we create systems that are open and provide platforms to enable mash-ups and collaboration—community collaboration. We want applications that can evolve and that can support development by the community. Among other things, this demands a high adherence to standards. We don't see a complete move to Open Source-- for the whole LMS. However an important part of the SFX source code is open – to enable easy customization and extensibility.

So we worked with Google scholar – we worked on OpenURL support, to enable users to link directly to library resources. Google is a legitimate access tool but does not cover all needs of scholars and learners. In particular, it is hard to see how it could meet the need of finding and getting the less popular, less cited, yet not less important body of scholarly and cultural content that many libraries have. We believe it would be fair to say that Google is misaligned in that task –it's not their biz, which is driven by advertising.

So Primo is part of the mix. It's about complimentary products and services (not secondary) --what I mean here is that it will be one of the access points, not the only discovery point. But it does provide a key aspect of relevance to the community it serves regardless of the format of the resource. It's about services for a specific audience. Another point –existing library systems don't deal well with non-print paradigms. There will be an increasing role of usage data in guiding collection development. Libraries should be tracking user data –so should NOT give this role up to Google (et al)—or rather they should make sure they benefit from the treasure of usage log files. From usage manifested in click streams, libraries could derive various metrics and have the basis for recommendations etc. This is valuable data for the library in terms of developing its services and collections (print and electronic)

Primo is about unification of access-- unification of library collections from a users point of view. It's a stand-alone product but clearly this also will benefit from interoperability with back end systems. SFX too was a stand-alone product but is interoperable. Another key trend is the increasing move to de-coupling of systems –esp. backend (library) systems

Primo right now tightly integrated with MetaLib but it's open to other federated search approaches. There are practical and pragmatic barriers to a genuine and totally open 'best of breed' approach.

Unification of access & Resource discovery

Primo represents a first step towards a new architecture of library information systems. Primo unifies the user services across all types of resources regardless of format and location. The next step for us in the new architecture is unification of the management of all library resources, regardless of format and location. We refer to this new architecture and framework – URM (for Unified Resources Management) framework. Our goal is to revolutionize back-office library management tools in the same way we've revolutionized end-user discovery and access tools through primo. It's about providing library management tools that breaks down the ILS/ERM/DAM silos, that moves from point solutions to a unified framework.

One of the key goals is to provide a solution for the full business process—front end and back end (library management)-and this needs to cut across all format types. Solutions that can't look across all formats are incomplete –and it's not just about electronic. Print remains important

Standards

The ExLibris view is to map the process and then fit the library system well into that overall process. So we need interoperability standards. I [Oren] see the adoption of Open URL by Google as one of ExLibris' greatest successes, but this is an exception for a library standard. There is a need to profile general standards for the library domain. There needs to be community specific profiles and the library is just one of these communities

ExLibris is closely involved in the NISO Architecture Committee (Oren is the representative). The role of W3C is important as they are integrating with the whole web community. RDF, SOAP, etc are increasingly important

SOA and web services

Newer products have web services embedded from the start. We have also developed a suite of web services based APIs (X services) for core Aleph LMS. This enables web services interoperability with, for example, student registry, finance, payment systems, and authenticate and authorisation systems. In the UK for example they can now deliver a generic web services API to SITS. At Nottingham MetaLib and Aleph services are integrated with the University Portal (uPortal)

With the latest ExLibris product offerings- e.g. Primo- web services is built in right from the start so that it can work with other user interfaces.

Open Source

Open source is reducing the costs of development and therefore the costs to consumers. Open source components are embedded in Ex Libris products. For example Primo uses the Lucene (from Apache) search engine. ExLibris products themselves however are not distributed as open source

Where is the future investment going?

Key two spaces (see above). There is of course much emphasis on Digital – creation of local outputs and repositories that store and share that output

preservation. This includes national libraries and other special collections. This is the 'third' realm. Expenditure is shifting from print to electronic and now to digital. This is a key area for change. Increasingly boundary lines will have to be redrawn - don't have to be single institutional, could be shared across institutions. So this brings libraries more into contact with non-library players.

Growth opportunities for LMS/ERM

There are still some geographic spaces to exploit, which means having systems that can truly address different cultures. This has benefits to all - e.g. Chinese literature is not just of value to the Chinese. No short terms plans on other sectors.

Differentiators in and approach to, the UK HE market

There are more central licences, some minor stuff on biz process and different vendors but really UK strategy is simply part of a global strategy. In product terms there are some minor UK specific differentiators in things like short loan and ILL but nothing major.

The UK is major world player in HE and for example has a significant proportion of the world's top universities. It is, therefore, a key strategic market for ExLibris. Its needs play a big role in how we develop our products and services. Our global positioning and presence helps our UK customers connect to the global scene and benefit from global trends and best practice. We also ensure we deliver to UK functional specifics in our products (e.g. UK ILL has some unique characteristics because of the place of the BL)

A2.2.3 Market offering

The main components/modules in the offering to the HE library market:

(Adapted from various sources including the company website)

LMS

ALEPH 500

Includes modules/add-ons:

- Web OPAC
- ADAM (enhanced cataloguing of and linking to digital objects)
- Cataloguing Acquisitions/Serials
- Circulation
- Resource Sharing
- Interlibrary Loan
- Reporting Center

In 2006 ALEPH 500 got to release 18, 67 new sales in 2006, bringing the total installed base 1,941;

Voyager 12 new in 2006

Installed base 1,175 libraries

ALEPH 500 and Voyager therefore have 3,116 combined installations.

The UK installed base is 43 (approx 1.4% of global total)

Resolver

SFX

SFX - the original OpenURL link resolver - is a tool for interconnecting library-controlled resources and services. SFX provides users with context-sensitive links to services that librarians define on the basis of their institution's e-collections and policies. Such services, which are dynamically created, can include links to the full text of an article, the OPAC (for local holdings), preferred document-delivery suppliers, related Web-based resources and services, local information repositories, and a range of other services.

'Continues to see strong sales' (Breeding 2007).

'In 2006 SFX got its 1000th customer'

The UK Installed base is 58. (Julie Booth UK MD)

Metasearch

MetaLib

MetaLib provides a consolidated search environment for remote information resources. MetaLib streamlines the discovery process by presenting users with content from multiple information providers in one user interface

'Continues to see strong sales' (Breeding 2007).

The UK installed base is 44. (Julie Booth UK MD)

ERM

Verde

The Verde system is designed to be a powerful single point of administration for all of a library's e-resources, taking into account the complex, multidimensional nature of electronic resources. Verde uses its own global knowledge base and builds on the power of the SFX® link server to provide access to hundreds of thousands of electronic products. Electronic resources present many new challenges to library administrators, in the areas of subscription management, licensing, user permissions, and ongoing post-subscription access. Verde supports the service requirements of e-resources by complementing, not replacing, the systems currently deployed by libraries. Verde uses Web Services to share its information with a range of applications, including other staff tools such as acquisitions and cataloguing systems, and end-user applications such as OPACs, A-Z lists, Metasearch tools, and link servers.

'Endeavor-developed Meridian will fall away in favour of Verde, which had significantly higher sales prior to the merger. The two products have combined installations of 103 libraries, with 80 new sales in 2006'. (Breeding 2007)

The UK installed base is 13 (in addition 2 Meridian sites will migrate to Verde in next few months) (Julie Booth UK MD)

Vertical search

Primo

Primo is a one-stop solution for the discovery and delivery of local and remote resources, such as books, journal articles, and digital objects. Primo assists libraries in exposing the richness of their collections and engaging users with an up-to-date

discovery and delivery experience. Interfacing with library applications from Ex Libris and other vendors, Primo is a stepping stone in the transformation towards a new information system architecture—unifying front-end user services and back-end management of all types of library resources, regardless of format and location.

'In 2006, Ex Libris channelled much of its energies into the development of Primo, the company's next-generation interface, a new discovery and delivery tool' (Breeding 2007).

The UK installed base is 2 (Julie Booth UK MD)

Digital Content Management

Digitool

DigiTool® is an enterprise solution for the management of digital assets in libraries and academic environments. DigiTool enables institutions to create, manage, preserve, and share locally administered digital collections. It can improve the integration of digital collections with institutional portals and e-learning systems

(In UK Digitool is being targeted as a solution for Digital Repositories)

The UK installed base is 7 (Julie Booth UK MD)

How do ExLibris products interoperate with products those from other LMS/ERM vendors?

We interoperate with our own products first (e.g. Primo and MetaLib) but all new products designed to interoperate more widely by means of standards

Does ExLibris have partnerships with other LMS/ERM vendors?

With Talis for Verde

A2.2.4 Engagement with Customers

Customers doesn't mean exclusively Aleph/Voyager LMS customers. For the UK we have territory based User Groups that focuses mostly of product detail – enhancement etc. Also have specific product based groups. There is also a strategy group for UK Library Directors (cf ARL Director Group in USA). The underlying need for Primo and Verde was identified in this strategic process. They deal with wider environment. They are deliberately not constrained to specific areas where it is felt ExLibris must play in a product sense That keeps us involved and aware of the wider HE environment.

If there is output that can be developed into appropriate products then this will go to focus groups/advisory boards—but these are deliberately not just UK based. They will start to develop a general scope and then work with system people. Ex Libris also uses specific library development partners, but again this is not on a narrow UK basis—we deliberately don't have development partners from just one geography. In addition we will pick dev partners outside our core Aleph/Voyager LMS base to ensure any new products and services can interoperate with non Ex Libris LMSs.

So the underlying need that was later expressed in product terms with Primo came out of strategy meetings. As well as development partners we set up a 'charter' group for Primo. These are the 'early' adopters—wider than dev partners. They get involved with the fine tuning—e.g. around documentation or implementation processes. In terms of UK only specifics these tend to be around services. However we did have a recent UK specific focus group on ILL because the ILL landscape in the UK is different because of the special role the BL plays.

A2.2.5 UK HE customers

New LMS accounts in UK HE since January 2005

- 2005 University of the Arts (Talis to Voyager)
- 2005 Nottingham Trent (Dynix Classic to Aleph)
- 2006 University of Gloucestershire (Unicorn to Aleph)

ExLibris LMS Customers - January 2008

Institution	LMS	OPAC
Aberdeen, University of	Aleph	WebOPAC
Anglia Ruskin University	Aleph	WebOPAC
Bristol, University of	Aleph	WebOPAC
Canterbury Christ Church University	Aleph	WebOPAC
Courtauld Institute of Art	Aleph	WebOPAC
Coventry University	Aleph	WebOPAC
Dundee, University of	Aleph	WebOPAC
East Anglia, University of	Aleph	WebOPAC
Gloucestershire, University of	Aleph	WebOPAC
Goldsmiths, University of London	Aleph	WebOPAC
King's College London	Aleph	WebOPAC
Lancaster University	Aleph	WebOPAC
Liverpool John Moores University	Aleph	WebOPAC
London, University College (UCL)	Aleph	WebOPAC
Loughborough University	Aleph	WebOPAC
Napier University	Aleph	WebOPAC
Newcastle University	Aleph	WebOPAC
Norwich School of Art & Design	Aleph	WebOPAC
Nottingham Trent University	Aleph	WebOPAC
Nottingham, University of	Aleph	WebOPAC
Royal Holloway, University of London	Aleph	WebOPAC
Westminster, University of	Aleph	WebOPAC
York, University of	Aleph	WebOPAC
Abertay, University of	Voyager	WebVoyage
Aberystwyth University	Voyager	WebVoyage
Cambridge, University of	Voyager	WebVoyage
Cardiff University	Voyager	WebVoyage
Edinburgh College of Art	Voyager	WebVoyage
Edinburgh, University of	Voyager	WebVoyage
Falmouth, University College	Voyager	WebVoyage
Heriot-Watt University	Voyager	WebVoyage
Hertfordshire, University of	Voyager	WebVoyage
Kent, University of	Voyager	WebVoyage
Lampeter, University of Wales	Voyager	WebVoyage
London School of Economics and Political Science	Voyager	WebVoyage
Open University	Voyager	WebVoyage
Plymouth, University of	Voyager	WebVoyage
Richmond - The American International University in London	Voyager	WebVoyage
Royal Welsh College of Music and Drama	Voyager	WebVoyage
Strathclyde, University of	Voyager	WebVoyage
Swansea University	Voyager	WebVoyage
University of the Arts London	Voyager	WebVoyage

A2.3 Innovative Interfaces

Interview with:



Neil Block, Vice President of Worldwide Sales

and



Gene Shimshock, Vice President Marketing

A2.3.1 The Business

(Adapted from Breeding 07⁹⁴ with some changes)

Innovative Interfaces, Inc.

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<http://www.iii.com>

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Tel 0117 910 8100

Company Profile

Innovative Interfaces, a privately held company wholly owned by cofounder, Chairman and CEO, Jerry Kline, ranks as the third largest in the industry and has retained its market standing broadly without mergers and acquisitions. The only M&A activity was in 1997 when it took over the UK based LMS provider SLS which had a significant share of the UK HE market. The company prides itself on its corporate stability and has been profitable every quarter since its founding.

Innovative operates globally and operates in the academic and research, public and schools sector. About 70% of the company's 2006 business was from U.S libraries. Millennium, the company's flagship LMS, saw 67 new sales, more than any competing

⁹⁴ 'An Industry Redefined. Private equity moves into the ILS, and open source support emerges. Automated System Marketplace 2007'. By Marshall Breeding. Library Journal 1st April 2007.
<http://www.libraryjournal.com/article/CA6429251.html>

product. Millennium is very strong in US research libraries having a first-place ranking of 38 out of the 123 ARL institutions. It has well-developed products for consortia resource sharing. In the UK its focus was for many years solely in academic libraries. It now has two UK public library customers.

The company has focused much of its current effort on a vertical search product 'Encore', which it characterises as a 'new discovery services platform for library patrons.' The company launched Research Pro, a new federated search product, which replaced its earlier offering, MetaFind.

Innovative's ERM system was the first commercial system available in this product category and continues to hold the lead in number of installations; version 3 was released in 2006 and includes support for the new SUSHI standard for automatically retrieving usage statistics from publishers. Innovative has 201 ERMS customers, up from 180 last year.

The scale of the operation (2006)

Global: Revenues \$70-\$80 million

Global: staff: 295

UK based staff

10

Presence in UK HE

Innovative is number four in terms of market share in UK HE with 18% of the market.

UK HE Annual revenues

Innovative reports its total UK revenues at £ 5,645,354 (the 2006 revenue figure from the filed company accounts for Innovative Interfaces Ltd).

There is a small number of non-UK HE customers (Irish HE, FE, public) but the UK HE is very much the large majority of the customer base. A UK HE figure is therefore probably around £4.5m which certainly makes Innovative the highest earner in UK HE despite not having the largest market share.

A2.3.2 Strategy

The company is very focussed on delivering a comprehensive suite of solutions to libraries. We take pride in our ability to take advantage of the wider trends and developments and bring them, often ahead of other vendors, into the library space—e.g. ERM, Encore. Why is this? It's because we don't have the distractions of VC, mergers and other ownership changes. So we are very focused on getting products out the door. We focus on product, customer and service. Our continuing profitability keeps us strong.

Our global and UK, strategy is all about organic growth—we don't want a bunch of customers, acquired through a merger for example, who didn't select us. We

still see strong new name account growth. Of course the market is mature, but we dispute the characterisation that all LMSs are the same. Libraries recognise there is still a clear difference. So, customers still find strong tangible reasons to switch to Millennium.

Current trends

Much more focus by libraries on the user experience. That has fed directly into product development and hence Encore –which is about streamlining that experience and making it a rich web-based experience.

Integration of e-resources – bringing them in with everything else

Why not make it all available in Google? We acknowledge that research often initially does take place in Google but the library has a role in giving authority (in an Innovative products context via Webridge and Research Pro, for example).

Resource Sharing

Increasingly we see groups of libraries sharing resources via, for example, INN-Reach –in US, Australia but not much in UK yet. INN-Reach ties together individual libraries and uses a patron-initiated (rather than a library mediated) model in circulation. Primarily this is being done by a physical (i.e. not distributed via z3950 for example) shared resource –i.e. INN-Reach is also a peer-to-peer system. Libraries are often surprised by the lack overlap in collections –finding for example 70% unique. From a circulation point of view systems can be decentralised. Sharing has now moved beyond the physical print resources to e-journal and is why Innovative developed ‘ArticleReach’. So we see resource sharing has become an important strategic initiative. It dramatically reduces costs.

Trends in how staff interact library systems

It’s about providing a more streamlined system that also interacts easily with external (e.g. Admin) systems. Our approach is to use web services to make links to outside services to improve staff productivity to deliver enhanced services to users. For example our ‘Program creation and registration’ software enables the dynamic linking of events (conferences etc) to other resources displayed in the OPAC. For example if the student searches for they will see print, e-resources etc combined with relevant events in their subject field.

Trends in wider technology - SOA/Web services

A focus on web services to share data is a key emphasis—moving past the old batch file paradigm—so opens up sharing with non-library institutions such as registry, Amazon etc. One of our Web services based approaches is Inventory Express, an acquisitions module that offers dynamic linking by ISBN from the acquisitions module to vendors for price and availability. In addition we can import records - patron registration and updates, and fines and fees. But admin

systems can be the resistance point and many in library/university admin IT are still more comfortable with batch process.

In terms of portals Innovative supports single sign to enable a user to move from portal to LMS functions without the need to re-identify/authorise.

Also we can embed library data in the portal--fines fees etc--via RSS. So this is about opening more 'channels' to enable data to be available in portals, cell phones, etc.

Open source

Innovative has great deal of experience in leveraging value in open source –so we get best of breed utilities as components of a commercial library system offering. We use OSS within the overall context of our offering to libraries. We remain sceptical about its capability, at present, to deliver large-scale library applications. As part of an overall integrated solution it works and so Innovative supports it. So our approach to OSS might be characterised as tools based rather than code-based.

Many libraries remain challenged in having the resources needed to add development value back into the product. We see this even in our own product...it's sometimes a challenge to get libraries to actually make some of the changes they need to do to provide a more current and functional product. But a small percentage is developing tools; e.g. their own OPAC over the core LMS.

Currently, libraries are considering the OSS decision based on factors other than the functionality that is available in current product offerings. Due to the relatively early stage of the OSS offerings, they don't yet offer the functionality of current commercial offerings. We know that this will change over time but, at the current time, those looking at OSS are interested in the community aspects of this software rather than specific service or functional benefits.

Social computing, tagging, community (Web 2.0/Library 2.0)

Innovative has been very aggressive in getting this into products –e.g. user generated review, ratings and tags...and that will continue. . Encore is specifically designed to address this need with tagging and user initiated reviews, etc. But we still face conservatism of librarians to e.g. tagging, which is a barrier to the take up of these features.

Where is the LMS going?

Many competitors are still in the process of renewing their legacy products. Innovative's early move into Java means we've already done that --so it has allowed continued focus on functionality rather than focus on changes to accommodate underlying platform changes for the LMS. So for example in Acquisitions a web services approach means that as soon as you type in an ISBN the system can go out and provide price information dynamically from the vendor. As you order you can link into reviews etc...so this is about integration in the staff side. The 'LMS is the electricity of a library' so that it becomes the integration point of many other services. So it's about extending the LMS to

match the extended role of library as it moves, for example, to electronic material and web services integration with other systems or institutional repositories

Where is ERM going?

Innovative was very early on into ERM to manage e-resources and this now includes integration of usage statistics -SUSHI, COUNTER and mashing up with acquisitions data so libraries get some real analysis of usage and so can start to understand better the return on investment for these expensive electronic resources. Our ERM offering has broad market acceptance, is well developed, and already on Version 3.

ERM represents another way to expand our market by selling to libraries that use a competitor's LMS. In fact Innovative started by selling products to interface with other LMS so it's nothing new. What we are always trying to be is the best in the market.

Where is the future investment going?

(From Breeding 07).

'Innovative Interfaces focused on developing Encore, a new discovery services platform based on Millennium technology' Features planned for Encore include dynamically generated "popular choices," a tag cloud based on subject headings, and faceted navigation. Innovative enlisted 14 development partners to assist in the creation of Encore, including Binghamton University, Nashville Public Library, and Yale University's Lillian Goldman Law Library, among others'

Growth opportunities for LMS/ERM

Innovative still sees healthy growth via acquiring new name accounts. Our very concerted focus on being the best of breed for libraries also means we have substantial growth opportunities to up-sell to our existing customer base. The needs of libraries are constantly changing so there is demand for new products and services. We provide a very diverse and very library focussed, product stream. If we can do it better ourselves, then we will. For example we have a great patron self-check system called Express Lane, which is also cheaper than products from other leading (self service) vendors. New geographic areas will support growth. We do see growth in the Middle East for example. And once in a new geography our product range enables us to go deeper-- across sectors for example. We can start with academic libraries and go into public.

Differentiators in, and approach to, the UK HE market

The UK is very similar to America and Australia. There are some local peculiarities e.g. short loan and some aspects of ILL, but really overall requirements are much the same. However we do see a significant difference in the limited application in the UK of in depth resource sharing across libraries resources sharing. We believe this might change as the economies of scale are proven.

A2.3.3 Market offering

The main components/modules in the offering to the HE library market:

(Adapted from various sources including the company website)

LMS

Millennium

Millennium is Innovative's library management system (LMS) solution. It includes cataloguing, circulation, acquisitions, serials, a Web-based online catalogue (WebPAC Pro) and management reporting functionality. ILL is also available. The web OPAC has optional spell checking and RSS feed functionality. There are options for value-added content such as table of content displays, book jackets, reviews, and e-books.

E-journal Management

Content Access Service (CASE)

CASE) delivers e-journal coverage data –the CASE suite includes Coverage Data Service to complement link resolvers and ERM systems, MARC Record Service and the CASE HTML A to Z List for online browse.

ERM

Electronic Resource Management

The Innovative ERM system manages content, subscription, and licensing information for e-journals, information packages, abstracting and indexing (A&I) databases, and full-text databases. License and resource details display in the WebPAC in both staff and patron modes

Metasearch

Research Pro

Research Pro is a meta-search capability across the library's defined information resources. These information resources can include licensed full-text or citation databases, Web sites, search engines, Z39.50 databases, library catalogues, and local digital collections.

Non MARC (XML-based) cataloguing

MetaData Builder

MetaData Builder allows libraries to describe and store digital collections using Qualified Dublin Core and EAD as alternatives to MARC. The XML-based records created are fully integrated with the MARC records in the database.

Open URL resolver

WebBridge LR

WebBridge LR provides OpenURL linking to full-text article content from citations in external reference databases. It facilitates linking to the appropriate and available electronic copy by matching against the library's journals and their coverage dates

Data harvesting

XML Harvester

The XML Harvester is OAI-PMH compliant. XML harvester provides an automated cataloguing tool that can create MARC records from XML metadata stored on remote servers. These MARC records are loaded into the Millennium database with URL's that offer links to the digital objects stored on the external server where appropriate.

VLE Integration

Courseware Integration – Blackboard

This links WebPAC Pro and My Millennium to course management software. It enables sites using Blackboard community system (formerly called Blackboard Portal System) version 6.x or higher to provide WebPAC Pro and, optionally, MetaFind or Research Pro functionality within Blackboard.

Digital Repository

Symposia

Symposia liberate the 'grey literature' and digital assets regardless of format: Puff's, text, images, learning objects, or executable programs, within an organization's network. It includes a submission facility and searchers have access to a Web-based interface, accessible through its own portal and/or a Research Pro-enabled WebPAC.

Consortia Resource Sharing/Borrowing

INN-Reach

INN-Reach provides for resource sharing for libraries that want to partner with a group of libraries, whether or not they're part of a formal consortium. It connects multiple library automation systems and allows patrons from one library to request and borrow materials belonging to another library. The direct borrowing model provides resource sharing that can be faster and less costly than alternatives.

Article Reach extends the INN-Reach functionality by allowing patrons to request copies of journal articles from a central INN-Reach catalogue. It includes a web form for initiating requests, a staff module for responding to requests for copies of articles held by the supplying library, and access to statistical data to track performance and use of the product.

How do Innovative products interoperate with those from other LMS/ERM vendors?

Our history is rooted in providing products that interoperated with other products. This continues with ERM for example

Does Innovative have partnerships with other LMS/ERM vendors?

No. Our aim is to provide best of breed across the whole range of library needs. Of course we don't stand in the way of libraries that wish for example to add Aquabrowser or Endeca. However we want to provide solutions that are better. To date, we haven't seen a big groundswell for these types of products...for all of the press and interest it has gotten, products like Endeca haven't made a major dent in the marketplace.

A2.3.4 Engagement with Customers

Innovative holds an annual academic worldwide directors symposium. This is very strategic and includes contributions from independent individuals. To be strategic you need to be international and this provides UK libraries with opportunity to engage with their worldwide peers.

At the product level we make extensive use of focus groups, often around major conferences like ALA. The CEO Jerry Kline plays a very active part.

There is a European Users Group with very strong representation from the UK. Key high-level Innovative executives get involved with this user group and provide strategic briefings, etc.

A key part of Innovative's engagement is with development partners. There is nothing necessarily UK-centric about this, however, Glasgow University is especially notable for its involvement as a dev partner for ERM and, more recently, Encore.

The high global profile of UK HE means it is a strategic market for Innovative

A2.3.5 UK HE customers

New name accounts since January 2005

- UHI Millennium Institute (from OCLC (Fretwell Downing) –OLIB LMS)
- Aston University (from DS -Galaxy LMS)

**Innovative Interfaces customers in UK HE –
January 2008**

Institution

LMS

Advanced Legal Studies, Institute of	Millennium
Aston University	Millennium
Bangor University	Millennium
Bedfordshire, University of	Millennium
Chester, University of	Millennium
City University, London	Millennium
Classical Studies, Institute of	Millennium
Commonwealth Studies, Institute of	Millennium
Durham University	Millennium
Edge Hill University	Millennium
Essex, University of	Millennium
Exeter, University of	Millennium
Glasgow, University of	Millennium
Heythrop College	Millennium
Hull, University of	Millennium
Institute for the Study of the Americas	Millennium
Institute of Germanic & Romance Studies	Millennium
Institute of Historical Research	Millennium
Keele University	Millennium
Leeds, University of	Millennium
Liverpool, University of	Millennium
London Metropolitan University	Millennium
London South Bank University	Millennium
London, University of (senate House Library)	Millennium
North East Wales Institute of Higher Education	Millennium
School of Oriental and African Studies	Millennium
Sheffield Hallam University	Millennium
St Andrews, University of	Millennium
St Mary's University College, Twickenham	Millennium
Stirling, University of	Millennium
UHI Millennium Institute	Millennium
Warburg Institute	Millennium
Warwick, University of	Millennium

A2.4 SirsiDynix

Interview with: (with some detailed additions from UK staff)



Stephen Abram, Vice President of Innovation

A2.4.1 The Business

(Adapted from Breeding 07⁹⁵ with changes and additions)

SirsiDynix

101 Washington Street SE, Huntsville, AL 35801-4827

Tel: +1 256 704 7000

www.sirsidynix.com

UK Office

The Chequers, Mary's Way, Chesham, Buckinghamshire HP5 1LL

Tel: 01494 777666

Company profile

By its June 2005 acquisition of Dynix by Sirsi, SirsiDynix ranked as the largest company in the industry, and employed 629 people at the end of 2006. The acquisition also acquired Sirsi Ltd (now trading as SirsiDynix), the UK company that ran Sirsi's European operations and was owned jointly by its UK Directors and Sirsi Corporation. In December 2006, SirsiDynix entered a new phase when it was acquired by Vista Equity Partners. Vista, a modest-sized private equity firm with about \$1 billion under management, purchased 100% of SirsiDynix. Prior to the transaction, SirsiDynix was owned by Seaport Capital (about 80%), a New York based venture capital firm, and HM Capital (10%), with minority ownership by the current and previous executives and directors.

SirsiDynix has customers in 70 countries and serves approximately 4,000 clients in the following library sectors: public, academic, school, special, corporate, government, consortia, and state and national. Worldwide presence: Huntsville, Alabama, Provo, Utah, and St. Louis, Missouri, in the U.S.; Montreal, Quebec, and Waterloo, Ontario, in Canada; London, United Kingdom, Paris, France, Copenhagen, Denmark, Leiden, Holland, Madrid, Spain, and Hamburg, Germany, in Europe; Shanghai, Taipei, and Singapore in Asia; Auckland, New Zealand; and Melbourne in Australia. Distributors are

⁹⁵ 'An Industry Redefined. Private equity moves into the ILS, and open source support emerges. Automated System Marketplace 2007'. By Marshall Breeding. *Library Journal* 1st April 2007.
<http://www.libraryjournal.com/article/CA6429251.html>.

located in Ireland, Greece, Portugal, the Middle East, Africa, Poland, Latin America, and Asia.

The company made 71 new sales for Unicorn in 2006 though sales have declined steadily since 2001. The total installed base for Unicorn and Horizon are remarkably similar, 1,583 and 1,597, respectively.

The scale of the operation (2006)

Global Revenues: approx £60 million (\$120 million)

Global staff:

629

UK HE annual revenues.

£2,800,000 (Estimated - not verified by SirisDynix)

Estimated as follows: Talis has £3.3m (accounts 2005/06 from Companies House) from 23% market share of HE so SirisDynix with the same market should be similar but for the fact that its customer base is more slanted towards smaller HE customers means revenues will be lower

UK based staff

56

Presence in UK HE

SirisDynix , Talis and ExLibris all have an almost identical market share of 22/23%

A2.4.2 Strategy

Current trends

Global economic trends mean library budgets will become even more constrained. The US dollar is falling and the US economy has major problems—national debt, war funding, sub-prime mortgage crisis, etc. Oil prices are way up so we might start preparing for an economic slow down. This will trickle down to publicly financed institutions, which will have problems. ILS companies will need to help them adjust. But librarians can be fiscally illiterate. They often don't see the big economic picture and the impact of global trends on library success.

All systems in HE libraries need to be systems that integrate with learning and the overall mission and to do that more successfully they need to collaborate at a much higher level---nationally maybe even globally. Unlike most competitors SD, in North America at least, has systems from cradle to grave—so you move from high school, to university you see same patterns a 'scaffold approach to learning. One of the technology implications of this is SaaS. So SD has built a huge server farm that could run all of their clients. SD has dealt with security issues—has

USA Navy and other major very security conscious clients on it. Libraries working in this way can reduce the total cost of ownership by up to 40%.

So libraries would be well advised to go to 'real' consortia and also to multi-type consortia involving public libraries, FE, schools, and NHS. Unfortunately, many HEIs have become more competitive rather than collaborative.

Trends in how staff interact library systems

Technology needs to be delivering increasing productivity. So increasingly ILSs should reduce staff and also keystrokes. (We aim for 25% reduction at each new release of our ILS.) But libraries resist this as it presents them with HR issues. They spend a lot of time discussing workflow strategies –and this takes time Technologies like PDA's, RFID, Self-check, etc. also provide strong opportunities for productivity enhancements, especially when tightly integrated into an ILS. The back end needs to reduce and front line needs to deal with Web 2.0 stuff.

User Experience and Web 2.0

There is a need to engage with end users (rather than just librarians). Librarians are often trying to make users 'text based' learners. Kids today are not the traditional 'scholars' and this is not in itself bad. HE business models are in need of extreme innovation in order to get the necessary revenues to fund education, libraries and R&D

Libraries need to integrate properly with their institution, which means integration at the lesson level - hence our Rooms and SchoolRooms product to contextualise content at this level. Rise in distance education means users experience their College at the lesson level so libraries need to be relevant there. The storage system for all this is the LMS.

SirsiDynix has had a portal solution in the market for many years. This product is now emerging as a key part of SD strategy and allows for the integration of any user experience / library 2.0 effort into a standard, tested template as well as in a portlet meeting the needs of ADA, PDA, XML, oriented future users. Our Enterprise Portal Solution is in all market sectors and has been adopted state-wide in about a half-dozen states for their SchoolRooms K-12 product initiative Search needs to be improved. Federated search is a mild diversion unless tied to the user's specific context—known item searching is not the norm. Users want immersion technology (which is trying to improve the quality of the question) and want to be given options and in context flexibility.

The problem of so-called visual browsers (AquaBrowser, Endeca etc) is being able to work real time. They work off a fixed (dumped) database –so there are problems with holds (reservations) for example and other internal integration in circulation or ILL.

We need to get librarians past their desire to see just lists –i.e. very text based. The need in HE is to read for insight still needs to be addressed in better way. It's not good to expect current students to have the same approach to text and reading as students 30 years ago. Faceted and visual displays are well accepted by many user segments.

Data mining/business intelligence

What SD has done with its Normative Data project for public libraries could be done for HE. HE is not making enough use of its rich data on activity and users across the institution – web stats, ILS stats, IR usage.

Local Context and Social networks

For example BiblioCommons⁹⁶ in Canada is a recommendation engine, Amazon on a local level. The question is: what's the best stuff for your community.

Standards

Unicode is important especially in the context of a merged federated search / OpenURL functionality. The library market is typified by middle-aged unilingual people. Users will be multilingual, have needs to be addresses beyond 'English', or will need to search multilingual stuff (e.g. Japanese patents).

OpenURL 3: Need to link universal search with universal fulfilment. This will improve ILL/document delivery - hence the importance of Open URL 3 to deal with chapters, paragraphs, podcasts, etc. Resource sharing is a next level in this ILL evolution.

JSR 168 is vital to integrate with portlets, which must be editable. SD wants to create a 'library' of portlets. This is about deep integration of portal stuff--brings identity management into LMS. So then the individual institution can make it work locally. The SD approach to APIs is quite deep and having trained library staff for decades in the use of APIs and having one of the most open ILS is a key competitive advantage. SD has a large library of APIs.

Using standards to enable the LMS to be developed and integrated with the wider environment is putting stress on users (libraries). They will need cross-functional teams to develop stuff. This emerging sector reorganization will challenge HE institutions.

SD is not a member of W3C but is an active member of NISO.

SOA/Web services

Our Web Services API supports XML input and output options for SirsiDynix's APIs. SirsiDynix provides an API to all modules of the Unicorn system.

Open Source

SD uses Open Source components to solve the real problem. We encourage Open Source in portals to build customer experiences. We support AJAX and J2EE, etc. However our view is don't use Open Source to re-invent the minor ILS—concentrate of the REAL stuff.

⁹⁶ <http://bibliocommons.com/> 'We're completely re-thinking the online library experience. We've had our heads down building and delivering groundbreaking new services, transforming online library catalogues from searchable inventory systems into engaging social discovery environments'

Distributed development (Open Source) is not ok for military or financial transactions. So would you use Open source for inventory systems that are audited? Would you use Open Source for financial transactions? Can you trust the kindness of strangers to write code and backdoors for your systems? Can you let them write code that links to other key institutional systems? Are you ready to architect for real development (not application use) and testing and approvals? Will you hold OS software to the same RFP standards as you require of commercial developers?

Where is the LMS going?

A primary corporate direction is moving systems to SaaS. SD has had to set up various server farms to get around local issues and USA Patriot Act.

Our a portal solution is now emerging as a key part of SD strategy

Where is ERM going?

ERM is just marketing hype. Libraries simply need good systems to manage their resources and the distinction, especially now between print and electronic is artificial.

Where is future investment going?

SaaS is a key area that will deliver big cost of ownership improvements for libraries. SD has become biggest and most multinational company so there is still a lot of investment in new and developing markets and further internationalisation of product and services.

Where are the growth opportunities for LMS/ERM vendors?

International is 70% of growth beyond North America - China, new geographies. We have three Asian offices with mostly Asian staff. The challenge in international is the state (fully developed, emerging) of the local knowledge economy. Building portals in many languages and integrating the tools is a key direction.

Differentiators in, and approach to, the UK HE market

There are some minor differences in the UK approach that include Athens & LDAP Authentication, Academic Reserves (short loan bookings) and more Integration with VLEs.

Some of the elements of our solution that we believe are significant in the UK context are:

- *The Enterprise Portal Solution with its context management technology which allows users to build subject-based virtual "Rooms" to contextualise content from any source.*
- *SaaS – attractive solution for all sizes of libraries – reduces cost of ownership*
- *The scalability of our LMS – suitable for < 6 users to > 1000*
- *Business Intelligence and Data Mining Tools*

A2.4.3 Market offering

The main components/modules in the offering to the HE library market:

(Adapted from various sources including the company website)

LMS

Symphony

LMS development is converging on SirsiDynix Symphony, a development based in Unicorn. The Horizon 8.0 (inc. Corinthian) development has stopped in favour of SirsiDynix Symphony. Horizon 7.4 is still in development mode and progresses for the foreseeable future. *Symphony* includes *core* capabilities for Circulation, Cataloguing, Serials, Acquisitions, Materials Booking, and Course Reserves. It has optional consortia capabilities for multi library operation. The OPAC can be enhanced with a range of content such as book summaries, reviews, book jacket images, tables of content, author notes, first chapters and book lists.

OPAC/Portal

EPS/Rooms

SirsiDynix Enterprise Portal Solution™ is a single and unified interface to the varied information, resources, and services offered by an institution, including books, databases, digital archive, RSS feeds, virtual reference, and federated search capabilities.

Using EPS/Rooms, libraries can 'build' subject-based environments within which information seekers content – everything from eBooks, videos, and photos to virtual reference tools, Web sites, and local information – all focused, connected, and presented in the context of particular subjects.

In November 2007 Sirsi announced a (OEM) partnership with Brainware Inc., (a company also owned by SD Private Equity owners) whose context-based enterprise search technology will be incorporated into SirsiDynix's next-generation search solutions. According to the press release Brainware technology 'will provide innovative fuzzy search, fuzzy logic, dynamic categorization and other capabilities to enable information seekers to discover more content from more sources — including libraries' own catalogues, Z39.50 sources, subscription resources, digital collections, crawled Web content, subscription content and social networking data'

Federated Search

360 Search

'Prior to March 2006, SirsiDynix based its Single Search product on technology from Muse. While continuing to sell and support Single Search, SirsiDynix formed a partnership with Serials Solutions in April 2006 to offer that company's Central Search (recently renamed 360), as its primary federated search offering' (Breeding 2007).

Resolver

Article Linker

Sirsi Dynix partners with Serial Solution to deliver the Article Linker resolver product

Resource Sharing

URSA

URSA (Universal Resource Sharing Application) enables Web-based requesting of interlibrary loan (ILL) resources. Staff and users can place requests for a variety of local and remote materials, in a single, unified display. URSA also supports walk-in loan requests by enabling staff to authenticate visiting users and automatically create new records for them. URSA can be used by all types and sizes of libraries as a single, full-featured ILL solution or in combination with other interlibrary loan products, depending on the needs of the library.

Managing digital content

Digital Library

SirsiDynix Digital Library is a digital archiving system, a digital document repository, and a cadre of applications for building, managing, and integrating digital archives. Digital Library combines a suite of high-volume digital capture and production tools with a sophisticated Web-based retrieval engine. This digital collection can include images of anything – rare handwritten letters, fragile newspaper clippings, genuine artefacts, historical pictures and documents, and other non-copyrighted materials.

Service offerings

Consulting, data services, implementation, network services, training, system/data security, software as a service (SaaS).

How do SirsiDynix products interoperate with those from other LMS/ERM vendors?

Z39.50 and other, APIs (SD has been doing this API stuff for over 15 years). We work with other vendors through our certification programme – in particular for SIP2 and NCIP. All other ILS vendors are supported through Z39.50 as well as federated search programs.

Partnerships with other LMS/ERM vendors?

No genuine partnerships with LMS competitors (e.g. to cross sell products).

Deeper integration is available for resource sharing and ILL.

A2.4.4 Engagement with Customers

We have a range of channels -strategic, user groups, focus groups, forums 'institutes', Advisory boards, surveys, etc. Note especially the SirsiDynix Institute, which has started some international events.

A2.4.5 UK HE Customers

New Name accounts in UK HE since January 2005

- University College for the Creative Arts (Formed through the union of The Surrey Institute of Art & Design, (was Talis)
- University College and the Kent Institute of Art & Design (merged institutions)

SirsiDynix customers in UK HE - January 2008

Institution	LMS	OPAC
Royal College of Art	Dynix Classic	??
Birkbeck, University of London	Horizon	HIP
Birmingham College of Food, Tourism and Creative Studies	Horizon	HIP
Bradford, University of	Horizon	HIP
Huddersfield, University of	Horizon	HIP
Lincoln, University of	Horizon	HIP
Marjon, The College of St Mark & St John	Horizon	HIP
Middlesex University	Horizon	HIP
Staffordshire University	Horizon	HIP
Trinity College Carmarthen	Horizon	HIP
Bath Spa University	Unicorn	iLink
Bath, University of	Unicorn	iLink
Bristol, University of the West of England	Unicorn	iLink
Brunel University	Unicorn	iLink
Buckingham, University of	Unicorn	iLink
Buckinghamshire Chilterns University College	Unicorn	iLink
Cranfield University	Unicorn	iLink
Education, Institute of	Unicorn	iLink
Glasgow Caledonian University	Unicorn	iLink
Guildhall School of Music and Drama	Unicorn	iLink
Imperial College London	Unicorn	iLink
Leeds Metropolitan University	Unicorn	iLink
Leicester, University of	Unicorn	iLink
London Business School	Unicorn	iLink
London School of Hygiene and Tropical Medicine	Unicorn	iLink
Newport, University of Wales	Unicorn	iLink
Pharmacy, School of	Unicorn	iLink
Queen Margaret University Edinburgh	Unicorn	iLink
Queen Mary, University of London	Unicorn	iLink
RCN Institute	Unicorn	iLink
Reading, University of	Unicorn	iLink
Robert Gordon University	Unicorn	iLink
Royal Academy of Music	Unicorn	iLink
Royal College of Music	Unicorn	iLink
Royal Scottish Academy of Music and Drama	Unicorn	iLink
Royal Veterinary College	Unicorn	iLink
Southampton, University of	Unicorn	iLink
St George's, University of London	Unicorn	iLink
Trinity/Laban (Trinity College of Music site)	Unicorn	iLink
University College for the Creative Arts at Canterbury, Epsom, Farnham, Maidstone and Rochester	Unicorn	iLink
York St John University	Unicorn	iLink

A2.5 Talis



Dave Errington (CEO)



Justin Leavesley (CTO and Director)

A2.5.1 The Business

(Adapted from Breeding 07⁹⁷ with major changes and additions)

Talis

Knights Court, Solihull Parkway, Birmingham Business Park B37 7YB

Tel: 0870 400 5000

www.talis.com

Company Profile

Though the focus of its business is in the UK, Talis has been a vocal proponent of Web 2.0 technologies, with frequent appearances in the United States (Breeding 2007). Over the last 4 years Talis has been undergoing a major change programme to position itself as much more than UK & Ireland based LMS provider. It now has global ambitions and characterises itself as an ‘innovative technology company expert at managing semantically rich metadata and in delivering software and services for information management’.

In February Talis was reconstructed and the owners (BLCMP Ltd and an Employee Benefit Trust) voted to transfer ownership to a new company called Talis Group. Talis Information Limited is now wholly owned by Talis Group. The shareholders of Talis Group are the company staff and the local authority and academic institutions (around 60) that had previously been members of BLCMP.

Talis now presents itself in two parts. The first is ‘Applications’ and comprises the LMS products and services part of the business. The second, ‘Platform’ business, is devoted to the promotion and development of the Talis Platform. ‘Using Semantic Web

⁹⁷ ‘An Industry Redefined. Private equity moves into the ILS, and open source support emerges. Automated System Marketplace 2007’. By Marshall Breeding. Library Journal 1st April 2007.
<http://www.libraryjournal.com/article/CA6429251.html>

technologies coupled with advanced indexing and fast searching, any type of unstructured or semi-structured data can be managed by the Talis Platform and made available to share, remix and reuse. Developers have access to a wide range of open web services that use standard protocols and formats to dramatically reduce the complexity and cost of application development'

The scale of the operation (2006)

Global Revenues

£7.6m

Global: staff:

90

UK HE Annual revenues

£3.3m

Estimate: based on Talis reporting that approx half annual revenues are from academic libraries. This equates to £3.8m so UK HE represents less than this.

UK based staff

90

Presence in UK HE

Has a 30+ year history in UK HE being founded originally as a cooperative (BLCMP) at Birmingham University. It has 23% of the UK HE market. (See Appendix)

A2.5.2 Strategy

Trends

In the HE sector spending has shifted to electronic resources –so there's a need to manage that expenditure --hence ERM. Repository market is nascent so players are small. Quality of peer review is important so there are critical business issues in managing this stuff

Looking at wider trends the real underlying factor is that everything and everyone are getting connected. The Web is a manifestation of this wider trend. The web first made content more visible to humans. The semantic web makes it visible to machines. So this ripples through everything. The web is just another step on the road. There have been other connectivity examples before e.g. phone.

The increasing importance of search is demonstrated by Google. It's a need to search inside and outside—a web of repositories for example. Google isn't presently solving the entire problem. It doesn't yet provide enough 'context', for example to students and researchers. So what's the best stuff? What stuff should

the institution licence? If we knew this it would result in an improved use of resources. It's about the user's context (e.g. University student). Your profile gives better results. The better the context defined the better results will be. The context problem is not solved in HE, which has an opportunity here because its users are (relatively anyway) well defined—with a particular goal anyhow. So students won't wait for JISC or its IE. They'll just get on Facebook or whatever.

Trends in how staff interact with products.

Self serve is changing roles. Changes in managing cash, e-payments. Changing roles in acquisitions and supplier selection. More finance integration. Less sitting in front of admin screens. Less data entry. Cataloguing is changing to creating metadata for electronic materials. Management information is becoming more important with more data more mining.

Where is the LMS going?

It needs to synch with external trends. Talis' job is interpreting these trends for its market. Trends such SaaS and interoperability reduce cost. The break up of monolithic systems to interoperate – loose coupling of applications, applications getting connected with each other. So requires non-domain specific standards e.g. web services. 'Processes' get connected with others, so it doesn't matter where the data is.

Standards

By definition connectivity mean global standards. Hence Talis is active on W3C to influence. Dominant standards are web (e.g. W3C) derived standards rather than NISO (e.g. z39.50)

SOA and web services

SOA and web services are a wider software industry trend that Talis is responding to in order to enable loose coupling of applications. The JISC attitude is fine but isn't a motivation. Nevertheless this could be an area where JISC could come and engage with vendors to see how this trend is being applied.

There is more to be done to increase the take up of this approach in the library domain. What could really help is, for example, a model for a borrower or a reading list schema we can all share. Maybe JISC could bring together the community and remove friction. Or how about establishing common web services schema guidelines and best practice to enable something like OCLC's World Cat local to interact deeply (e.g. reservations/holds and other user account activities/transactions). Because the JISC is a non-vendor body it could have a valuable role in this way, which would have the result opening up the market, increasing competition, and so reducing costs.

Open source (and Open Data)

Open source is about distributed innovation. It's 'free like kittens not free like beer'. Will distributed innovation increase? It will become dominant. When you distribute it enables recombination of innovation. Science is an analogy—what would happen if all universities kept research secret?

We understand the technology, the philosophy. So how does this translate—Talis is already distributing Open Source—Cenote, Keystone. The UI for Prism will be Open source. The templates that libraries produce must be Open Source so the community will get all these.

There is also as big an issue about Open data as there is with Open source. Look at the power of Google maps and Google earth. Libraries are not opening up their data.

Overall product strategy

This is about improving service, reducing cost and duplication. We are also thinking a lot about the end user. Why Facebook? Why Youtube? What are the key elements that make them successful? Students want their library account in Facebook (or similar). With fees etc HEIs are operating in a commercial market. Students are consumers. So Keystone is there because students want services in their portal or wherever they happen to be. There are things the institution wants too—better registry connectivity for example to get efficiencies. New technologies enable global integration and this is also a global HE need. Talis will grow by profitably solving people's needs. This means looking wider than just the LMS. Keystone is an obvious example and it puts library services into other places—institutional portal for example—i.e. where the student wants them. Other examples are universal search, managing digital resources and integrated resource management.

Differentiators in, and approach to, the UK HE market

It's a smaller market [than US] and public not private—means different adoption curves—we don't have rich institutions that can risk spending on innovation. Fewer bloggers

We differentiate our approach to the UK market. It's about small things like focus and closeness (not just geography) to our market. We have kids at university-our customers. We have large a UK market share. Our company culture is much hungrier.

A2.5.3 Market offering

The main components/modules in the offering to the HE library market:

(adapted from various sources including the company website)

LMS

Talis Alto

The LMS is at the heart of the suite. Includes modules for Circulation, Cataloguing, Acquisitions, Serials and ILL

OPAC/Metasearch

Talis Prism

Payment Handling

Income Manager

All of payment handling facilities of a till, combined with I banking, auditing, and income generation tools

Messaging

Talis Message

Extends the postal and email notification options within Talis Alto with the latest telephony and SMS technologies.

Reporting

Talis Reports

A quick and convenient desktop reporting solution for everyday management information needs.

Management Information

Talis Decisions

A performance management tool allowing decision makers to analyse the library's performance and trends.

Complementary Products

(Solutions that integrate with diverse library management systems)

Bibliographic data

Talis Base

The largest UK bibliographic data source delivering quality records into the LMS, which includes the ability to search across a very large database of records with a UK library orientation.

Integration

Talis Keystone

Enables integration of library-centric functions with other institutional applications, making library data visible and accessible in a range of channels.

EDI

Talis Gateway

A procurement service for EDI (electronic data interchange) transmissions between libraries and suppliers that reduces complexity surrounding EDI and networking standards.

Reading Lists/Resource Lists

Talis List

Resource list management system, providing creation and presentation of learning resources.

Catalogue aggregation/ILL

Talis Source

The largest single free union catalogue of bibliographic and holdings in the UK, with 26 million catalogue items and 55 million holdings records from over 200 academic and public libraries.

How do Talis products interoperate with those from other LMS/ERM vendors?

Talis List integrates with all LMSs and Talis Base does too (via Ztarget). Gateway (EDI) will interoperate but it not quite there yet. We work with other link resolvers, self-serve, and SRU/SRW services etc

Keystone is focussed on our own LMS for now but is designed to enable interoperability with other LMSs. Anything new we develop is standards based to work with other LMS and as appropriate with other external system

Partnerships with other LMS/ERM vendors

The only formal relationship is with ExLibris. Our Connexions programme includes working with ExLibris with Verde but there were some problems because Verde didn't support 1Cate (now OCLC resolver), which the customer wanted to continue to use.

A2.5.4 Engagement with Customers

We have a strong belief in community-so will use whatever tools we come by. We use (open) forums to enable peer-to-peer support. All the usual stuff –User Groups, Focus Groups Advisory Boards etc. it's about harnessing collective intelligence—for example using podcasts to share

The dialogue goes wider than just 'customers' in the narrowest sense. Talis is open. Blogging etc is done to reach out to other players. Talis organises events to stimulate the conversation. We believe that the 'market is a conversation'. In our experience other LMS vendors are inward looking and defensive and can't see it as a two way process. Customers have much more info—the market hasn't responded to this fact.

A2.5.5 UK HE customers

New name accounts in UK HE since January 2005

- University of Cumbria

Talis UK HE Customers - January 2008

Institution	LMS	OPAC
Birmingham, University of	Alto	Prism
Bournemouth University	Alto	Prism
Brighton, University of	Alto	Prism
Cardiff, University of Wales Institute	Alto	Prism
Central England in Birmingham, University of	Alto	Prism
Central Lancashire University of	Alto	Prism
Chichester, University of	Alto	Prism
Cumbria, University of	Alto	Prism
De Montfort University	Alto	Prism
Derby, University of	Alto	Prism
East London, University of	Alto	Prism
Glamorgan, University of	Alto	Prism
Glasgow School of Art	Alto	Prism
Greenwich, University of	Alto	Prism
Harper Adams University College	Alto	Prism
Kingston University	Alto	Prism
Liverpool Hope University	Alto	Prism
Manchester Business School	Alto	Prism
Manchester Metropolitan University	Alto	Prism
Manchester, University of	Alto	Prism
Newman College of Higher Education	Alto	Prism
Northampton, University of	Alto	Prism
Northumbria University	Alto	Prism
Oxford Brookes University	Alto	Prism
Paisley, University of	Alto	Prism
Portsmouth, University of	Alto	Prism
Queen's University Belfast	Alto	Prism
Roehampton University	Alto	Prism
Salford, University of	Alto	Prism
Scottish Agricultural College	Alto	Prism
Sheffield, University of	Alto	Prism
Stranmillis University College	Alto	Prism
Sunderland, University of	Alto	Prism
Surrey, University of	Alto	Prism
Sussex, University of	Alto	Prism
Swansea Institute of Higher Education	Alto	Prism
Teesside, University of	Alto	Prism
Thames Valley University	Alto	Prism
Ulster, University of	Alto	Prism
Winchester, University of	Alto	Prism
Wolverhampton, University of	Alto	Prism
Worcester, University of	Alto	Prism