



# Smart Libraries<sup>TM</sup>

Formerly Library Systems Newsletter<sup>TM</sup>

50 East Huron Street, Chicago, Illinois 60611-2795, USA



## Smarter Libraries through Technology:

### *Vendor Consolidation and its Impact on Libraries*

By Marshall Breeding

Library technology vendors continue to consolidate. Since the mid-2000s, the shape of the library automation industry has changed considerably through a constant stream of mergers and acquisitions. Many smaller companies continue to prosper, serving narrower groups of libraries with specialized products. But a group of large organizations dominate the industry, most involved with libraries as customers in many different parts of the world. This top tier includes non-profits such as OCLC, as well as Ex Libris Group, SirsiDynix, Innovative Interfaces,

Follett Software Company, and Axiell. A middle tier, such as Polaris, VTLS, The Library Corporation, and Auto-Graphics, likewise play an important role, each following different competitive strategies to find their own opportunities to grow to the next level or to even become one of the industry giants.

I spend a lot of time and energy tracking companies in the industry. It seems important to gain as much information as possible about organizations with which libraries spend substantial funds. Many of the articles and reports that I produce provide what I hope is useful information on business strategies, product developments, and both short and longer-term roadmaps. I also try to track some operational details, including how many libraries use each of their products, the number of personnel, and their allocation of resources among software development, support, and sales.

Most of these organizations are privately owned and have no obligations to make any of their business details public. I'm generally impressed with how much information most are willing to share. Libraries benefit from this information as they make decisions about the strategic technology products that support their operations and deliver services and content to patrons. In an industry niche as narrow as library technology, it's also pos-

## IN THIS ISSUE

**Vendor Consolidation and its Impact on Libraries**  
PAGE 1

**SirsiDynix Acquires EOS International**  
PAGE 2

**Polaris Announces LEAP to Deliver Web-based Automation**  
PAGE 6

### Get Your Smart Libraries Newsletter Online in PDF!

Subscribers to ALA TechSource's *Smart Libraries Newsletter* or *Library Technology Reports* can read digital versions through the scholarly content host, MetaPress. Subscribers also have access to an archive of past issues. Visit [alatechsource.metapress.com](http://alatechsource.metapress.com) to begin reading. Beside each issue title, you will see a solid green box indicating that it is available to you. You may need to log in to be recognized by the system. Please contact MetaPress Support [support@metapress.com](mailto:support@metapress.com) if you have any questions about or problems with access.

sible to compile some of this data through tracking the products implemented by libraries, which is one of the functions of my lib-web-cats database.

The next step of transparency, which is not currently widely practiced, would include more data regarding what libraries pay for their technology products. Business software does not have a one-size-fits-all price tag. We all understand that the amount that a library pays for software is scaled according to its size and complexity of use. I rarely hear complaints about this differential pricing model. Most contracts for big-ticket technology items, however, include non-disclosure terms that prevent libraries from publicly revealing the amount negotiated for software and support fees. The secrecy of pricing terms has been a topic of conversation in the library content arena as well. More knowledge about what peer libraries have paid would place libraries on more level ground as they negotiate their deals. The few times that I have been able to learn something about fees paid, it is not unusual to see libraries with similar characteristics pay vastly different sums for the same software. To negotiate well, libraries need realistic expectations on pricing for highly-complex business software balanced by as much competitive data as possible. As vendors become ever larger through seemingly never-ending industry consolidation, libraries need all the leverage possible. While software pricing among libraries may be a bit uneven, I also think that many libraries under-invest in technology infrastructure, especially in resource management and discovery services, relative to its strategic importance to the organization.

Libraries benefit from the operational scale of these ever larger organizations, such as their software development capacity. I have been relatively optimistic in recent years regarding the innovation of new product genres such as library services platforms and Web-scale discovery services. To a large extent, these innovations were made possible through the investments of large organizations and the efforts of their software engineering teams. Smaller organizations can also be great springs of innovation. The creation of the complex business systems for libraries, however, seems to require substantial investments. Many of these products also include knowledge base or index

components that require human as well as technical resources to develop, populate, and maintain.

One of the key dynamics I've noticed in the industry over the years is the vulnerability of companies that don't invest in developing new-generation products as their offerings age and fall below current expectations. The customers of companies offering only legacy products will eventually leave for more forward-looking technologies, or the companies themselves become absorbed through the mergers and acquisitions churn.

The supersizing of library companies has been driven by the external investors, typically private equity firms, which own most of the large library technology companies. Attention by these investors reflects well on the industry given their expectations for long-term growth opportunities. Despite the overall downsizing of the library economy, libraries continue to acquire technologies that enable them to operate efficiently and deliver excellent services for their patrons, providing a stable and even expanding business environment. For companies to succeed, however, they have to deliver compelling products at competitive prices and understand the nature of doing business with mostly non-profit, publicly supported institutions.

In the past few years, a number of companies have changed ownership through acquisitions by private equity investors. While new ownership can result in changes in business strategy, these tend to be relatively non-disruptive events. Mergers that result in consolidating companies tend to have a more dramatic impact. OCLC has contributed to industry consolidation through its acquisition of a number of library technology companies, primarily outside of the US. Last month's issue of *Smart Libraries Newsletter* covered OCLC's purchase of the Dutch company HCA. Consolidation has taken yet another turn here in the US. In this issue we take a look at the acquisition of EOS International, a major company in the special library sector, by SirsiDynix. It will be interesting to see if these two acquisitions are the beginning of a larger cycle of consolidation in the industry. Should we view these events in isolation, or are we at the beginning a new phase of activity in the history of mergers and acquisitions in the library automation industry? Stay tuned.

## SirsiDynix Acquires EOS International

**S**irsiDynix has acquired EOS International from its co-founder and Chief Executive Officer Scot Cheatham effective November 1, 2013. The transaction was conducted entirely from financial resources within SirsiDynix without addi-

tional backing from its private equity owner, Vista Equity Partners. The acquisition of EOS International will expand the presence of SirsiDynix in the small library arena, and will strengthen its overall position in terms of revenue, customers served, and product offer-

ings. SirsiDynix provides a stable and expansive business environment for the ongoing support, development and marketing of EOS International products.

EOS International will continue to operate as a separate, wholly owned subsidiary, though under the management of SirsiDynix. Scot Cheatham has exited the company and SirsiDynix CEO Bill Davison will now also serve as CEO of EOS International. Cheatham will continue to be available during a transition period. EOS executives continuing in their roles include Vice President of Product Development Jeff Goodwin, VP of Client Services Jeff Smith, Greg Leiser, VP of Finance, and VP of Global Sales and Marketing Sal Provenza.

SirsiDynix and EOS International both emphasize that this acquisition will not have an impact on the products of either company. The suite of EOS.Web products will continue to be supported and developed according to the short and long term roadmaps previously established. The automation products of SirsiDynix and EOS International are designed for quite different types of libraries, making product consolidation unwarranted.

In a statement to EOS customers, Scot Cheatham states: “Collaboration between SirsiDynix and EOS will allow us to apply significant resources to enhance our flagship product, EOS.Web. It will broaden our sales and marketing capabilities, and will help us to continue to strengthen our client services offering.” Although EOS International has a limited international presence, SirsiDynix is a company many times larger with global sales and marketing efforts.

The acquisition of EOS International brings around 1,100 new libraries into the SirsiDynix fold, primarily special libraries, but also K-12 school as well as a number of small academic and public libraries. In recent years, EOS International has stepped up its marketing to academic libraries with a tailored version of its flagship EOS.Web Academic, which includes features for electronic resource management and academic reserves. With the addition of the EOS.Web sites, SirsiDynix now provides ILS products to more than 4,500 libraries, the largest installed base of the companies involved with public, academic, and special libraries. When assessing the impact of these libraries on the market potential of the new company, it should be considered that EOS International deals with much smaller libraries than SirsiDynix.

Following the acquisition, the combined company will employ around 365, with around 50 new personnel added to the existing SirsiDynix workforce. In terms of personnel employed SirsiDynix will still remain below OCLC with over 1,200 FTE, Ex Libris with 522, and Innovative with 360 plus the personnel associated with its new India Office. The combined

SirsiDynix Symphony	2,433 employees
SirsiDynix Horizon	1,183
EOS.Web	1,100
Total	4,716

revenues of SirsiDynix and EOS International will be the highest of any company in the library automation industry.

## EOS International Corporate Background

EOS International offers EOS.Web as its flagship product, with specialized versions for academic, legal, and medical libraries in addition to its core version designed especially for corporate libraries. The company, based in Carlsbad, CA, stands as one of the pioneers of library automation for the corporate and special library sector.

Electronic Online Systems International, better known as EOS International, was founded in 1981 by brothers Scot and David Cheatham. Data Trek, as it was originally known, was formed to develop and market the software that David Cheatham developed to automate the corporate library of the Verbatim Corporation, a major manufacturer floppy diskettes, which were the state of the art of that time for computer files storage. The Card Datalog automation system, later renamed Manager Series, was first created for the CP/M operating system and ran on microcomputers that were at that time gaining in popularity for business applications. Following its success in the Verbatim Library, Data Trek marketed Card Datalog to other corporate libraries and eventually to types of libraries, including law, government, public, academic, and school. The software was ported to MS-DOS as that operating system became dominant following the release of the IBM-PC. The company was one of the first in the library automation industry to create software for Microsoft Windows, and today it specializes in Web-based products. Subsequent products developed by Data Trek included ULS Professional Series, a network-based integrated library system released in 1991 with features to support larger libraries; School Series, released in 1992 for K-12 school libraries; GoPAC, a Windows-based graphical online catalog; GLAS (Graphical Library Automation System), a full ILS developed for Windows released in Spring 1996; and eventually the current EOS.Web family of automation products with fully browser-based staff and patron interfaces, first released in August 2003.

EOS International has experienced several ownership transitions, mergers, and acquisitions. The company was originally owned by its co-founders Scot and David Chatham. Scot Chatham, with previous business experience in the insurance and financial services sector, joined the company on 1982 as its Chief

Executive Officer, with David Cheatham serving as President.

Between 1988 and 1996 EOS International had an evolving set of business relationships with Dawson Holdings PLC, a diversified UK organization founded in 1809, which at one time earned revenues in excess of \$1 billion. In the mid-1990s, its portfolio included a variety of businesses, including Information Quest (electronic subscription service), Faxon Company, Turner Subscriptions, Quality Books, Liberia Ciencias Industria SL, Surridge Dawson (wholesaler and distributor of newspapers and magazines in the UK). Dawson Holdings was acquired by Smith News PLC in June 2011.

Bryan Ingleby, then chief executive of Dawson Group, saw Data Trek as a vehicle to accomplish a vision of efficiently connecting libraries with suppliers, such as book companies, through automation systems.

Dawson Holdings PLC made its initial investment in Data Trek of around \$1 million in 1988, funding new international offices and software development, including the company's first Windows-based product, GoPAC. Dawson Holdings made additional investments over the next eight years, gaining an incremental ownership stake in the company. By 1996, Dawson Holdings held about 80 percent interest in Data Trek.

In July 1993, EOS International acquired The Assistant, a PC-based library automation system used by around 200 libraries from INLEX, Inc., a company based in Monterey, CA that had fallen into financial difficulties. INLEX, originally known as Electric Memory Inc., was founded in 1983 to market library automation systems for public libraries that operated on the HP/3000 line of minicomputers. In October 1993 INLEX/3000 was sold to Data Research, which was subsequently acquired by Sirsi Corporation. The Assistant was originally developed by Library Automation Products, Inc. and was acquired by INLEX in 1991. Interestingly, now both The Assistant and INLEX/3000 reside among the vestiges of library automation products in the corporate legacy of SirsiDynix.

In 1993 Data Trek developed a mechanism to automatically load invoices from Dawson Subscription Service directly into Data Trek via a process called Invoice on Diskette, a precursor to the EDI protocol used today to transfer business transactions from suppliers into automation systems. This Invoice on Diskette process was consistent with Dawson Holdings strategy to more closely link automation systems with library suppliers.

In February 1994 Data Trek acquired the OASIS ILS from the Technology Division of Dawson Holdings, which was used by about 300 libraries, primarily in the UK and France. Following the sale, Data Trek provided support services and offered incentives to transition the libraries to its own products. By this time Dawson Holdings had increased its equity in Data Trek to about 50 percent.

January 1996 saw a major transition for the company as it acquired IME Limited from its founders Kate Noerr, Peter Noerr and, and Helen Henderson. IME was a major provider of library automation products, offering the TINLIB library management system, which was known as The Information Navigator in the United States. Immediately prior to the acquisition, IME had announced a new system called Q Series, whose development was executed following the acquisition. The combined company was then renamed Electronic Online Systems International, or EOS International. By this time, Dawson Holdings had gained an 80 percent ownership stake in the company, with the founders retaining the remaining 20 percent.

Following the sale of IME, Kate and Peter Noerr founded MuseGlobal in 1998 to develop content integration technologies, such as connectors for federated search platforms, which have been used not only in the library sector, but in a wide array of business and information systems.

In 1997 David Cheatham shifted to lead Information Quest, a sister Dawson Holdings company, as its President and CEO. Information Quest, based on technology created by EOS International, aimed to produce a search environment that addressed a large body of e-journal content. It had obtained agreements with publishers to index more than 4,000 journals. The concept, considerably ahead of its time, was not unlike the index-based discovery services popular today. It was never fully realized, and David Chatham rejoined EOS International in 2010.

Dawson Holdings divested EOS International from its portfolio in November 2000, transferring ownership to the company to its co-founder Scot Cheatham. Tony Saadat, formerly Executive Vice President of rival SydneyPLUS, also gained equity in the company at that time and served as Chief Operating Officer. During this period EOS International worked to reinvigorate the company, launching the flagship EOS.Web product suite to replace the aging Windows-based products. Saadat exited EOS International in April 2009 and has since founded the competing company Soutron Global.

In the 13 years since EOS International has operated under the ownership of Scot Cheatham, the company has focused on establishing EOS.Web as its flagship product, with a large percentage of its clients choosing its SaaS deployment option.

## SirsiDynix Background

SirsiDynix ranks as one of the largest companies in the library automation industry, its products including the flagship Symphony and Horizon integrated library systems, the Enterprise discovery interface, and the Portfolio digital asset management platform. Recently introduced products include eResource

Date	Entity	Buyer	Seller
Dec 2006	SirsiDynix	Vista Equity Partners	Seaport Capital
Jun 2005	Dynix	Sirsi Corporation with financing from Seaport Capital	21st Century Group, Greanleaf Ridge, and Stratford
Jan 2005	Docutek	Sirsi Corporation	Docutek Information Systems Inc.
Jun 2005	Epixtech renamed to Dynix		
Jan 2003	Ameritech Library Systems becomes epixtech		
May 2001	Data Research Associates	Sirsi Corporation	Public Company
Oct 1999	Sirsi Corporation	CEA Capital Partners (later renamed to Seaport Capital)	Progressive investments to gain equity from founders
Oct 1994	MultiLIS	Data Research Associates	Sobeco Ernst and Young
Oct 1993	INLEX/3000	Data Research Associates	INLEX, Inc.
Nov 1999	Ameritech Library Systems	21st Century Group and Green Leaf Ridge	Ameritech
Jan 1993	Starlight Management System	Data Research Associates	Starlight (Australian firm)
Jan 1992	Dynix Systems	Ameritech	
Oct 1991	NOTIS Systems, Inc.	Ameritech	Northwestern University
Apr 1990	OCLC Local Systems (LS/2000, DataPhase LS/2,	Ameritech	OCLC
Feb 1984	Dynix Systems	Eyring Research Institute	Founders
1983	Dynix Systems founded		
1979	Sirsi Corporation founded		

Central for the management and patron access to e-books and other electronic resources, and the Blue Cloud suite of Web-based products that operate with Symphony and Horizon through the Web Services integration layer.

SirsiDynix has operated under the ownership of Vista Equity Partners since December 2006. Its nearly seven years as a portfolio company of Vista Equity Partners surpasses the investment interval of other private equity buy-outs in the library automation industry. In this same period, for example, Ex Libris has been involved with Francisco Partners, Leeds Equity Partners, and recently Golden Gate Capital.

The corporate history of SirsiDynix has been well chronicled in *Smart Libraries Newsletter*. The company was formed by the 2005 merger of two of the commercial firms that found their start developing library automation systems in the early 1980s. Sirsi Corporation was founded in 1979 by Jim Young, Jacky Young, and Mike Murdock. Dynix was founded just a few years later by Paul Sybrowsky, Keith Wilson, Jim Wilson, and Ralph Egan. Many other companies have come and gone dur-

ing the intervening years, with SirsiDynix left standing as one of the survivors of the industry, as shown in the accompanying timeline of acquisitions and mergers.

## Perspective

This acquisition represents yet another transfer of ownership from founder-based to private equity as well as further consolidation of the industry. In October 2013 OCLC acquired the Dutch company Huijsmans en Kuijpers Automatisering from its founders, consolidating international library automation companies within OCLC EMEA. Innovative Interfaces made its change from founder ownership to the private equity fold in March 2012 through its acquisition by JMI Equity and HGGC.

This move can also be seen in the context of the dynamics of the special library automation arena. In the course of the last five years, EOS International's main competitor, SydneyPLUS, has acquired many of the main players in this niche, including Cuadra Star, Inmagic, Questor Systems, Incite Software Solu-

tions, Lookup Precision, and LawPort, completing the consolidation in June 2013 through the formation of a new company Lucidea. While this sector has proven to be challenging for the smaller companies, the transition from a fragmented array of small, independent companies to a more consolidated state of larger companies has come later than for the industry as a whole.

EOS International operates in a very competitive business arena, with decreasing opportunities for automation products among the small and special libraries. The company saw peak interest in its EOS.Web products in the mid-2000s, with large numbers of contracts made, especially for existing clients migrating from its legacy products. Though new sales have tapered in the past few years, the installed systems and annual revenue have continued to grow.

From a technology perspective, EOS International finds a good match in SirsiDynix and its private equity owner. EOS International, like SirsiDynix, has been especially active in promoting its products through software-as-a-service. SirsiDynix supports more than 900 customers, some of which subscribe to multiple products, resulting in more than 2,000 hosted instances. EOS International supports more than 1,000 EOS. Web sites. Vista Equity Partners has a history of investments in technology companies in many different business areas that deploy their products via SaaS.

Since its acquisition by Vista Equity Partners, SirsiDynix has become more centralized and streamlined. The company has closed some of its operating facilities, including the original headquarters of Sirsi Corporation in Huntsville, AL and the former DRA headquarters in St. Louis, MO, centralizing most of its development and support in Utah. For a time, SirsiDynix operated out of the former Dynix headquarters in Provo, UT, but moved into a new technology complex in Lehi, UT

in December 2011. The company continues to operate international sales and support offices in Canada, Chile, France, the United Kingdom, Spain, Taiwan, and Australia and works with distributors in Saudi Arabia, South Africa, Turkey, and Portugal. Prior to the acquisition of EOS International, SirsiDynix employed just under 300 personnel, a marked decrease from the 679 reported directly after the merger and prior to the process of integrating the two businesses and antecedent companies. In the same timeframe, the headcount of EOS International has dropped from 82 FTE to 50.

The acquisition of EOS International provides SirsiDynix an opportunity to expand its customer base, to incorporate new personnel into its organization, and gives it access to additional technologies. The shared strategic interest in software-as-a-service may present opportunities for both companies. In the current business environment, success in the perspective of current or future investors is often measured in terms of growth, whether accomplished organically through product sales or through strategic acquisitions. The true impact of this acquisition from the library standpoint will be seen in the retention or expansion of the customer base and in the technology innovations that emerge.

## Sources

“Eleanor Cannon: Data Trek’s first client shares some memories.” *Input/Output: Quarterly News Guide of Data Trek*: 10 Issue 3 (Fall 1994).

Telephone interview with Scot Cheatham (Nov 5, 2013).

Breeding, Marshall. “Automation Marketplace.” *Library Journal*, 2002-2013.

Press Releases from EOS International, SirsiDynix, and related companies.

## Polaris Announces LEAP to Deliver Web-based Automation

From its inception, the Polaris integrated library system from Polaris Library Systems has been based on Microsoft Windows technology, including both server components as well as the staff interfaces. Its PowerPAC provides a Web-based online catalog for library patrons. At the Polaris User Group held in Portland, OR on October 9, 2013, the company announced that it has begun the development of a new product, called LEAP, which provides a Web-based set of interfaces for the staff functions of Polaris. The product fits the trend in the library automation, as well as the broader IT sector, to deliver software functionality

through browser-based interfaces rather than rely on client software installed on local computers.

Once completed, Polaris will offer LEAP as an additional interface option for libraries using the Polaris ILS. The Windows-based staff clients will continue to be supported and developed. LEAP will interact with the server component of Polaris, including both local on-premises installations and those hosted by Polaris.

Polaris anticipates beginning beta testing the initial modules of LEAP in the first quarter of 2014, with a general release of the product in the by mid-year.

LEAP does not aim to replicate the Polaris Windows clients. Rather, Polaris will revisit workflows that may be tied to the desktop clients and consider more elegant alternatives in a Web-based design.

This Web-interface approach avoids much of the technical work in installing and updating client software on desktop computers. For libraries with a large number of staff workstations, moving to Web-based applications can simplify the work of the systems librarians or IT technicians. Web interfaces also result in more flexibility in the devices used to access the system. Applications can be accessed by any system capable of running a modern browser—tablets and other mobile devices as well as any type of personal computer. For Windows-based products such as Polaris, moving to browser-based interfaces makes them easy to use on Apple computers, which continue to rise in popularity among businesses as well as consumers.

From a technology perspective, LEAP operates at the presentation layer, interacting with the Polaris server, which provides the business logic and database components. LEAP is being created using HTML5, which supports functions contributing to a rich interface, and it communicates with the Polaris server via an encrypted HTTP/S data stream.

The implementation of LEAP will involve some new development on the server component of Polaris. Creating this new family of interfaces provides the opportunity to enhance the Polaris APIs and expose a more comprehensive representation of the functionality of the application. LEAP's operation will be entirely based on APIs and not on proprietary mechanisms within the Polaris application. According to Polaris CEO Bill Schickling, the creation of LEAP will result in adjusting the Polaris software to enforce a strict division between the business application and presentation layer functions. The client-server architecture took advantage of the computational capabilities of the desktop clients, including some tasks such as authentication and error handling. Now the product makes a shift to a more pure services-oriented architecture, including the need to deliver some tasks previously implemented in client software to services delivered through the APIs.

The initial components of LEAP will focus on front-line services, including circulation and other tasks that lend themselves to be performed through mobile devices. List-driven services, such as items requested for holds, and other pick-lists for retrieving items from the stacks, are among those seen as especially convenient to be deployed through a portable browser-based application.

The specific pricing for LEAP has not yet been fixed. Libraries currently using Polaris will pay an incremental license

fee to receive LEAP in addition to the Windows-based clients. Polaris indicates that it may offer incentives for libraries interested in becoming early adopters.

As it creates this new Web-based product, Polaris has engaged an external firm with deep expertise in user interface design. Rounded (roundedco.com), also based in Syracuse, NY, provided user experience design and guidance to deliver the functionality currently embedded in the Windows-based staff clients through a modern browser-based interface.

The development of LEAP has also sparked changes in the way the Polaris produces software. The company has adopted agile methodologies, which involve a more incremental approach, addressing small units of functionality that can be accomplished in short intervals of work called sprints. Polaris has adopted a specific agile framework called Scrum (<https://www.scrum.org>), which is widely adopted in many software development firms. Polaris recently hired Mark Eskandar as its Director of Product Management, bringing extensive experience in agile development.

LEAP, in combination with the company's server hosting options, will also provide the company with the capacity to deliver a pure Web-based software-as-a-service solution. With this configuration, libraries would avoid the need to install and maintain the Polaris software on local servers or workstation clients. Polaris, like most companies in the library automation industry, sees increasing interest in hosted services. Roughly one fourth of their current installations are hosted in through their virtual private cloud.

Polaris offers both a dedicated virtual private cloud, where it hosts a server on behalf of the library, providing command line and SQL access to the same extent that would be possible for a local installation. Polaris also offers a shared virtual private cloud arrangement, where the library's instance resides on a shared server, with data and collections partitioned. The shared virtual private cloud, consistent with multi-tenant SaaS, does allow customer access to the command line of the operating system or direct SQL access to the database, but channels access to data and programmatic functionality through the APIs.

The announcement of LEAP represents an important step for Polaris. Its Windows-based automation system has proven itself in the market and has seen strong momentum in the US public library arena, winning a high proportion of the ILS procurements in this arena. As libraries increasingly expect Web-based products, LEAP gives the company yet another key asset in its suite of offerings.



Smart Libraries Newsletter  
American Library Association  
50 East Huron Street  
Chicago, IL 60611-2795 USA  
Address Service Requested

---

NON PROFIT  
US POSTAGE  
PAID  
PERMIT 4  
HANOVER, PA

---

## December 2013 Vendor Consolidation and its Impact on Libraries

### *Smart Libraries Newsletter*

Marshall Breeding's expert coverage of the library automation industry.

---

#### **Editor**

Marshall Breeding  
615-343-6094  
marshall@breeding.com

#### **Managing Editor**

Patrick Hogan  
312-280-3240  
phogan@ala.org

**Digital Access for Subscribers**  
alatechsource.metapress.com

### **TO SUBSCRIBE**

To reserve your subscription, contact the Customer Service Center at 800-545-2433, press 5 for assistance, or visit [alatechsource.org](http://alatechsource.org).

The 2013 subscription price is \$85 in the United States and \$95 internationally.

ALA Techsource purchases fund advocacy, awareness, and accreditation programs for library professionals worldwide.

Production and design by the American Library Association  
Production Technology Unit.

*Smart Libraries Newsletter* is published monthly by ALA TechSource, a publishing imprint of the American Library Association.

[alatechsource.org](http://alatechsource.org)

Copyright © American Library Association 2013. All rights reserved.