Introducing FOLIO - A new collaboration bringing libraries, service providers and developers together to speed innovation and redefine the future of library automation

A community-based open source environment, backed by vendor financial commitment, is designed to provoke a conversation about library innovation and technology

BOSTON — June 24, 2016 — Libraries and service providers have come together to reshape the future of libraries and develop new technologies. The new initiative, FOLIO, provides a platform for libraries, service providers, and other organizations to team up to redefine library automation via open source projects. The goal is to cultivate interest groups, form partnerships and spark conversations that will lead to the creation of new services and technologies for libraries.

FOLIO, which stands for the *Future of Libraries is Open*, is a new community coming together to develop a reimagined library services platform (LSP), one that supports traditional resource management requirements and functionality, yet is engineered for innovation and growth through industry collaboration. At its core, FOLIO will allow for extensibility into new services for libraries and will dramatically change the technology ecosystem available to libraries, service providers and technology developers.

The initial code for the base platform, which offers features for integrating modular services, is planned for release on GitHub in August 2016. This will be a technical preview of the underlying platform for developers to familiarize themselves with the APIs and provide early feedback. Following the August release of the FOLIO platform, code for applications will be released early and often, allowing librarians and developers to see, use and consider the code throughout the months to follow. The FOLIO community will build out the functional apps needed to operate a library, while innovating resource management and shared networked description for release in early 2018. Extended library management functionality will follow thereafter. The community will encourage developers to use the FOLIO platform to build new, integrated and transformative approaches to new service opportunities for serving library patrons.

EBSCO is providing the primary funding for the development of FOLIO with Index Data developing the initial platform and engaging deeply with the library developer community. EBSCO's President and CEO Tim Collins says EBSCO is excited to be a partner in the FOLIO collaboration. "This project gives libraries and vendors impetus to come together for a purpose that can have a truly huge impact on libraries now and for years to come. This is not an EBSCO project. We believe we can provide the stability and support necessary for the project to achieve sustainability. But, the ultimate impact of FOLIO will be determined by the scope of community participation. The very positive response by the community to date has been great to see. The opportunity for significant impact exists."

The Open Library Environment (OLE) Partnership is a collaborative of academic and research libraries that seek to build and operate innovative and open source software for library management services. Member libraries are Cornell University Library, Duke University Library, GBV-Common Library Network, Hbz-Hochschulbibliothekszentrum des Landes Nordrhein-Westfalen, Lehigh University, North Carolina State University Libraries, SOAS-University of

London, Texas A&M Libraries, University of Chicago Library and University of Maryland University Libraries. Michael Winkler, Managing Director for OLE, says that FOLIO continues and builds on the OLE vision of community approaches to building new library services. He says the key to FOLIO's success and impact is the collaboration. "With FOLIO, we have cause to bring people and libraries together around a single vision. We are excited to marshal our talented, dedicated individuals and our shared resources to develop and contribute to truly sophisticated services emerging in the FOLIO platform and software. Together, in this unique and open collaboration of librarians, technologists, service providers, and vendors, we are in a position to change the course of library technology in an extremely positive way."

Dean of University Libraries at Texas A&M University David Carlson, an OLE Board member, says FOLIO represents an extraordinary development in library systems development and has the power to change not only the system marketplace but to spark a transformation in the relationships between libraries and their vendors. "FOLIO represents a true partnership between libraries and vendors in which we are each making real substantive contributions based on our unique strengths." Carlson says FOLIO's focus on openness is what makes it so extraordinary. "With FOLIO, the future is open: open to new relationships, open to true collaboration and open to capacities that will enable libraries to achieve our mission of service to users. For the first time, libraries will be not only customers but investors with vendor partners in defining the future of library systems."

The collaboration is open, and even in its early stages, other libraries and service providers are joining the community and the conversation to spark innovation including libraries such as Massachusetts Institute of Technology (MIT), Charles University in Prague, National Széchényi Library (National Library of Hungary) and CALIS (China Academic Library and Information System) as well as organizations such as BibLibre, BiblioLabs, ByWater, Relais International and SirsiDynix.

Founder & Chief Business Officer of BiblioLabs Mitchell Davis, says, "FOLIO offers a path to building a library user experience equal to that of other elegant technology platforms we use in our everyday life. Without this happening quickly the relevance of libraries as digital content distributors is uncertain. The leadership of a company like EBSCO and the involvement of a proven technology leader like Index Data create a solid base from which to grow an amazing future for libraries and their patrons. Innovative software companies like BiblioLabs will thrive in an environment where the best products can win in the market, so of course we are in full support of this project and are happy to be part of it."

The open source code produced by the FOLIO community will be made available under an Apache v2 license, allowing any individual, institution, collaboration or vendor to use the code for its purposes —commercial or otherwise. According to Sebastian Hammer, team lead for the FOLIO core developers and co-founder of Index Data, everybody owns the code. "The more permissible the software license, the more libraries and vendors will engage. The more vendors who wish to create apps (open source or for-fee) and work to ensure that their existing applications work well with FOLIO, the greater the options are for libraries, and the more opportunity for those vendors."

EBSCO and other vendors plan to support libraries by providing hosting services that ensure libraries of all sizes can take advantage of the community's projects. Libraries and consortia will also be able to integrate FOLIO software into their strategic infrastructures to diversify or extend their services. Community members might also leverage the Apache license to develop functionality or integrations that support their current needs, or build new service models for their campuses—a true source of community innovation using the FOLIO platform.

SirsiDynix CEO Bill Davison says SirsiDynix is looking at additional ways to support the library industry, including the option of hosting FOLIO-created solutions for libraries that want a hosted environment. "SirsiDynix understands how to host and support libraries. We've been providing hosting services and 24/7 support to a global community of large, midsized and smaller libraries for over 30 years and we can make an open source approach possible with world-class hosting and support. The BLUEcloud Library Services Platform has been designed with openness in mind. When we compared our best-of-breed philosophy with the vision of FOLIO, we found that we were perfectly aligned to bring flexibility and choices to libraries." Davison says, as one of the premier hosted-solutions provider, SirsiDynix is interested in bringing its expertise to the FOLIO project. He says the next logical step is to partner with the FOLIO community and evaluate how it can best assist with the hosting and support components.

How to Join the Community

Since initial public conversations began about the open source LSP project at conferences such as Code4Lib in March, more than 1,000 members from dozens of countries have joined the community. Community members may participate in a variety of ways:

- **Functionalist—**contribute their knowledge of specific workflows and functional areas.
- **Strategist—**contribute their vision of how library technology must evolve in the years to come.
- **Developer—**contribute code and help build out the applications for the new extensible platform.

By engaging, members will participate in, and even lead meetings and workshops at conferences, virtual meetings, online forums and discussion boards. Blog and email communications will also help community members follow the project. Interested participants can sign up at www.folio.org and follow FOLIO on Twitter @FOLIO_LSP.

About FOLIO™

FOLIO is a collaborative effort between libraries, vendors, developers and consortia that leverages open source technology and a community-based effort to redefine library services and innovate based on library futures. By building on what libraries need and by leveraging library expertise as well as vendor capacity and velocity, FOLIO is designed to move libraries forward, build on the services they provide and redefine the role libraries play within their institution. FOLIO also levels the playing field and makes open source technology available to all institutions regardless of size or staffing. FOLIO brings vendors together to innovate and host services for customers and introduces open source as a service to libraries. To sign up to participate or receive more information go to www.folio.org.

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