

March 24, 2020

Tim Collins, Founder/CEO  
EBSCO Information Services

and

Bar Veinstein, President  
Ex Libris Group

Dear CEO Collins and President Veinstein:

We write today to express our concern over the lack of seamless data sharing between CARLI's two largest supported services, Ex Libris Alma/Primo VE and EBSCO Academic Search Complete. As we approach our June 24, 2020, "go-live" date for Alma/Primo VE, we expect that many of our members will be very disappointed with our new I-Share service when they try to use Academic Search Complete through Primo VE.

During our long tenure running Ex Libris Voyager, CARLI did not license a consortial discovery service. We provided VuFind for catalog searching and some of our members opted to license a commercial discovery layer. With the migration to Alma/Primo VE, CARLI is no longer discovery service agnostic. CARLI's supported platform and discovery layer will be Alma/Primo VE. Member institutions choosing to use a discovery layer other than Primo VE will need to support the administration of that service independently of CARLI and justify this additional expense to their administrations.

Some of our members may opt to craft or purchase solutions that will allow seamless discovery to a variety of siloed materials, but the vast majority of our members will rely on CARLI-supported services. Our ability to provide excellent service and support will be hindered by the lack of cooperation between EBSCO and Ex Libris.

As a reminder, CARLI represents 128 academic and research libraries in Illinois, comprising 90% of the higher education faculty, students, and staff in our state. CARLI's I-Share includes 91 of those 128 members. We know that *many* organizations—consortia as well as individual libraries—have asked your two companies to resolve the issues that prevent true interoperability of your products. These requests—replete with words such as "dismay" and "disappointment"—span the last six years and yet we have no resolution. Half-solutions and workarounds are offered as responses. These are not acceptable. We must be able to effectively search EBSCO-provided content and indexing directly in our discovery service, Primo VE.

Users have no tolerance for repeating searches in multiple search tabs or interfaces. Intuitive search processes and comprehensive responses are standard expectations for online services of all kinds today, and not only among our students born in the 21<sup>st</sup> century. The exclusively online instruction environment that many of us suddenly find ourselves working in today only reinforces the need to achieve true integration for discovery systems and strengthens our determination to pursue it. We cannot ask the staffs of our libraries to continue to 'teach around'

the unnecessary obstacles to student success created by business models focusing on protecting proprietary processes and information.

CARLI has invested *millions of dollars* in your companies' products, products that should work together. CARLI's consortial investment totals over \$12 million in the last five fiscal years; adding in purchases made by our members through the CARLI brokering program increases that total by another \$30 million. Investments on this scale must be met with responsiveness from your firms. For CARLI, our public funding comes with the added focus of transparency and accountability. Ex Libris' Alma/Primo VE and the EBSCO package were procured through open, competitive RFP processes. Both products are top-notch and our members expect our investments of this scale to work together in concert.

We fully endorse NISO's RP-19-2014 "Open Discovery Initiative (ODI): Promoting Transparency in Discovery," specifically section 3.2.1.1:

*3.2.1.1 General Requirements*

- 1. Content providers should make available to discovery service providers core metadata, and underlying full-text/original content for complete offerings, for the purposes of indexing to meet licensed customers' and authenticated end users' needs.*
- 2. To this aim, all content providers should make available to discovery service providers, at a minimum, the core set of metadata elements (see 3.2.1.2) for each item they submit for indexing.*
- 3. Content providers should provide the content item (full text, transcript, etc.) and additional descriptive content (abstract/description and controlled and/or uncontrolled keywords) (see 3.2.1.3), for as much of their content as possible.*

The CARLI Board of Directors, member libraries, and staff are confident in your ability to find a solution. Both of your firms, Ex Libris and EBSCO, articulate philosophies that focus on supporting customers, advancing research, and forging partnerships. The situation outlined in this letter presents an immediate opportunity to exemplify these strategies. We ask that you resolve your conflict immediately. If a true solution does not emerge—one that delivers seamless data sharing and post-search faceted navigation of the EBSCO content in Alma/Primo VE—we will be forced to seek an alternative solution. Going forward, we simply cannot continue to fund discordant products that accommodate a less than optimal environment.

Please communicate with us as soon as possible your plan for resolution.

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