

The FOLIO Open Source Library Services Platform

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Open source software provides libraries with more choice in how to deploy, support and develop mission-critical applications. Open source also provides more options for vendor-provided services. This paper provides insights into the open source FOLIO library services platform (LSP) to help libraries determine how best to take advantage of FOLIO as their next library system. It covers:

- Project Background
- FOLIO architecture and innovation
- FOLIO governance and sustainability
- Vendor-provided services

Project Background

The FOLIO project was announced in 2016 and touted as an open source and community-driven project to provide libraries more agency over how their software is managed and developed. Service providers, including EBSCO Information Services (EBSCO), worked alongside librarians, developers, and other vendors who have come together to build the new library services platform (LSP). By contributing to the FOLIO project, EBSCO continues its focus on open, interoperable systems so libraries can choose those applications that best serve their users.

FOLIO is an open-source project under the Open Library Foundation, a non-profit organization dedicated to open source in libraries. FOLIO is an entirely new platform developed from the ground up. The platform includes traditional library management functionality, such as circulation, acquisitions, and cataloging, and integrates print and electronic resource management.

The FOLIO community includes a large array of libraries and service providers from across the globe. In the United States, libraries that actively participate in the FOLIO project include Cornell University, University of Chicago, Duke University, and Texas A&M, among others. Other participating libraries worldwide include Shanghai Library in China, Chalmers University of Technology in Sweden, several German academic libraries, and many more.

EBSCO contributes human and financial resources for the development of FOLIO and helps guide the product roadmap, feature requirements and community development effort. In addition, EBSCO provides services for FOLIO including hosting, implementation, and ongoing support.

Architecture & Innovation

FOLIO is designed by libraries for libraries and is built on a modern, micro-services architecture to ensure continuous innovation. Today, across different industries, micro-services architecture has been established as the preferred way to develop software. The approach decentralizes technical components and development teams and enables the development of smaller applications within the framework.

Micro-services contrast with legacy approaches that deliver applications within a monolithic framework. FOLIO uses smaller apps, enabling libraries to work with different vendors and different teams who may contribute and develop apps in their areas of expertise. As a result, libraries also enjoy easier updates and benefit from faster development. FOLIO has open APIs, enabling easier integrations with existing systems – providing libraries more choice for services today and in the future.

FOLIO Governance & Sustainability

FOLIO is an open source project under the Open Library Foundation with representation from libraries across the globe. The FOLIO community development effort is coordinated through distinctive groups, which include library and service provider representation. The Community Council ensures a strong and healthy community by overseeing the operation of community activities and liaising with the other Councils. The Product Council defines the community roadmap. The Technical Council is an advisory group that helps define best practices. And Special Interest Groups provide subject matter expertise across domains such circulation, acquisitions, and other domains.

FOLIO community software releases happen regularly and are documented on the FOLIO wiki. The releases, named after flowers, consist of three releases per quarter and three named releases per year. Starting with the 'Aster' release in 2019, FOLIO has had nine releases to date. When the community releases a new version of the FOLIO software, EBSCO engineers 'harden' the release to optimize the community-released code for deployment in the EBSCO AWS hosting environment.

Vendor-provided Services

Different vendors across the globe provide FOLIO services including EBSCO. Through its services, EBSCO seeks to ensure that open source becomes an option for libraries of all sizes and staff availability. EBSCO provides FOLIO hosting, implementation, and support services. Globally, a network of local partners offer implementation and support such as AT CRIS in Germany, IBAI-Scanbit in Spain and UKS in South Africa. Examples of libraries having implemented or currently implementing EBSCO FOLIO - either a full FOLIO system or starting with electronic resource management (ERM) - include Chalmers University of Technology in Sweden, Cornell University and the Five College Consortium in the United States, as well as Universidad de Concepcion in Chile, Universidad de Zaragoza in Spain, the University of Liverpool in the United Kingdom, Università degli Studi di Modena e Reggio Emilia in Italy, and others.

Through its EBSCO FOLIO Services, EBSCO Implementation Consultants and Library Services Engineers manage data migration and implement any required integrations with EBSCO solutions and third-party services such as campus and student systems, authentication, inter-library loan and digital preservation platforms.

EBSCO hosts FOLIO on Amazon Web Services (AWS) and places emphasis on system performance and data security. EBSCO's team includes certified AWS Cloud engineers who test deployment and release procedures, plan system capacity and tuning, manage incident response, ensure automated backups and data retention, and oversee disaster recovery.

By hosting FOLIO on AWS, EBSCO's FOLIO implementations can scale automatically to support spikes in transactions and number of users. EBSCO FOLIO is also ISO 27001 certified, representing an ongoing focus on security and customer data protection. With AWS hosting, EBSCO supports robust security standards, ongoing monitoring and alerting, and real-time notifications of performance and security vulnerabilities. EBSCO's Information Security team holds specific certifications, specializing in information systems, intrusion analysis and prevention, incident handling, and computer forensics, in addition to having years of experience working with industry security best practices.

In Conclusion

The FOLIO open source Library Services Platform constitutes an entirely new model in library technology, changing how library software is developed, deployed, and procured. With an open source solution that is supported by service providers as needed, libraries can contribute expertise and provide input into the development of the platform as never before. The project provides complete transparency and libraries can consult the many different websites from folio.org to wiki.folio.org to dev.folio.org to learn about and participate in the project.

Tamir Borensztajn: Vice President of Software-as-a-Service and Open Strategy

Tamir Borensztajn has served as EBSCO's Vice President of Software-as-a-Service (SaaS) and Open Strategy since 2014. In this role, Tamir helps inform and present EBSCO's software strategy while working with libraries worldwide to understand their systems and software needs. Prior to joining EBSCO, Tamir served as Executive Director, Public Sector Innovation EMEA at Infor. He is a graduate of Hebrew University of Jerusalem and holds a master's degree in Library Science from Simmons University in Boston.

More information about EBSCO FOLIO may be found at <https://www.ebsco.com/academic-libraries/products/ebsco-folio>.