Corporate Update

ANZREG

February 7, 2014

Ziv Benzvi
VP APAC

ExLibris
The bridge to knowledge

Agenda

Corporate

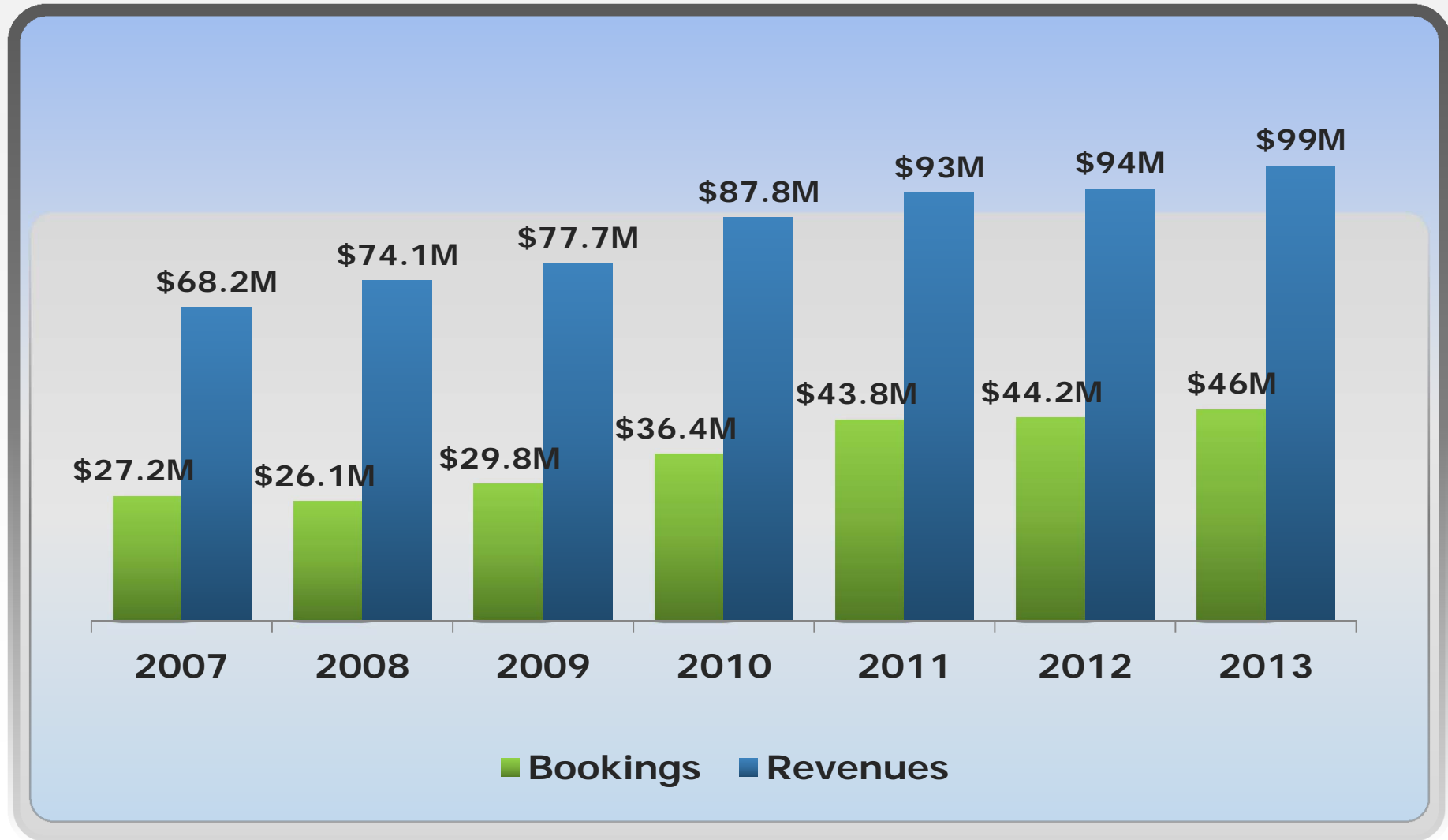**Solutions**

Operations

Customers

ExLibris

Corporate

Corporate

Solutions

Operations

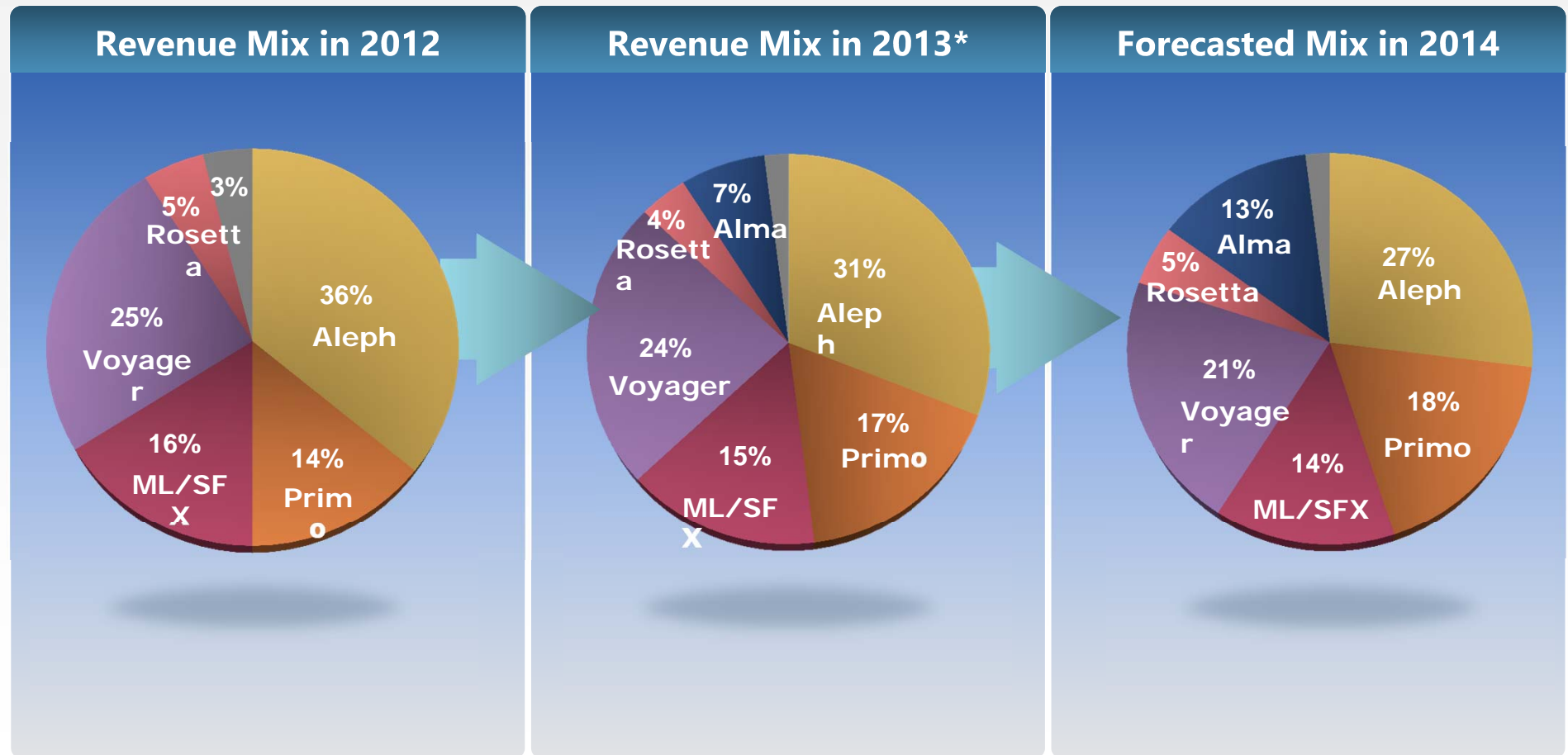
Customers

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Summarizing a Great 2013

- ## 280 new institutions

- ## 5,560 institutions

- ## 541 employees

- ## 3 data centers

- ## Alma Live!

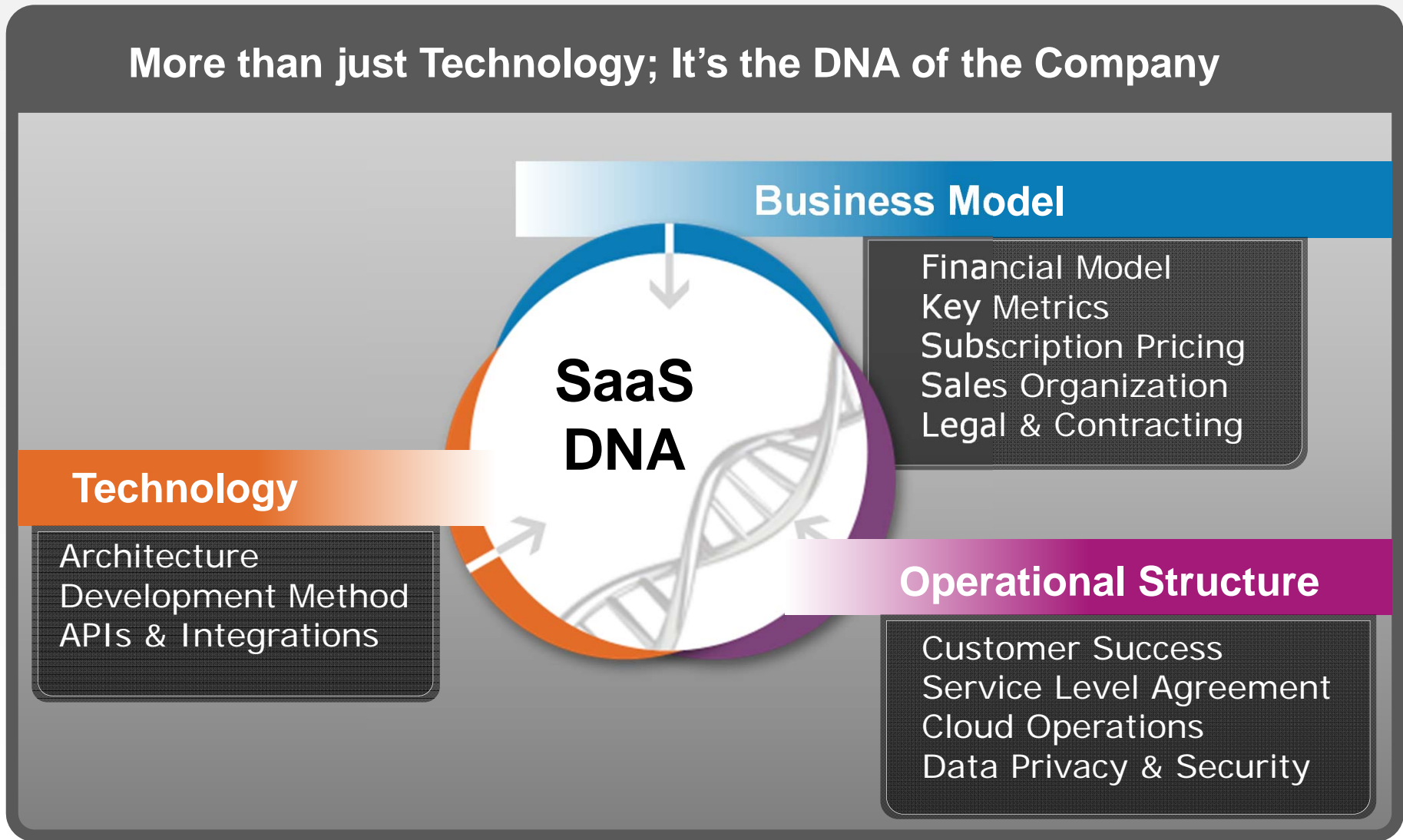# A Strong Organization – Sustained Financial Growth

Our traditional products are part of our success

Revenue Mix in 2012

- 3%
- 5% Rosetta
- 25% Voyager
- 16% ML/SFX
- 36% Aleph
- 14% Primo

Revenue Mix in 2013*

- 7% Alma
- 4% Rosetta
- 24% Voyager
- 15% ML/SFX
- 31% Aleph
- 17% Primo

Forecasted Mix in 2014

- 13% Alma
- 5% Rosetta
- 21% Voyager
- 14% ML/SFX
- 27% Aleph
- 18% Primo

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Transition to SaaS

More than just Technology; It's the DNA of the Company

Business Model

Financial Model
Key Metrics
Subscription Pricing
Sales Organization
Legal & Contracting

SaaS DNA

Technology

Architecture
Development Method
APIs & Integrations

Operational Structure

Customer Success
Service Level Agreement
Cloud Operations
Data Privacy & Security

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Solutions

Corporate

Solutions

Operations

Customers

2013: A Good Year for Primo

- #1 in higher education, serving **2,000 institutions** worldwide

- Recent enhancements:

  - **Personalized ranking**

  - **Tighter integration with Aleph, Voyager, and Alma**

- **Agile releases** present new functionality bi-monthly

- Introduced **Big Data technologies** (Cassandra and Hadoop) and large scale multi-tenancy

Primo: Just to name very few...

University of Adelaide (Australia) • University of Technology Sydney (Australia) • University of Linz (Austria) • University of Ottawa (Canada) • Comision Nacional de Investigacion Cientifica y Tecnologica (Chile) • National Library of China (China) • Fundacion Universitaria Los Libertadores (Colombia) • Hong Kong University (Hong Kong) • University of Torino (Italy) • Sapporo Medical University (Japan) • Kyung Sung University (Korea) • Colegio de Postgraduados (Mexico) • The BIBSYS consortium (Norway) • Universidad Nacional de Ingenieria (Peru) • University of Pardubice (Prague) • National Library of Russia (Russia) • Russian State Library (Russia) • Temasek Polytechnic (Singapore) • Universidad Polotecnica de Cartagena (Spain) • Umeå University (Sweden) • RERO-Reseau des bibliotheques de Suisse occidentale (Switzerland) • National Chengchi University (Taiwan) • Imperial College London (UK) • King's College London (UK) • Royal Holloway University of London (UK) • City University of New York (USA) • Orbis Cascade Alliance (USA)...

Primo 2,000

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Discovery and Delivery solutions

Korea Aerospace University(Korea) • Universidad Tecnologica de Leon (Mexico) • Rice University (USA) • Universidade de Sao Paulo (Brazil) • The Chinese University of Hong Kong (Hong Kong) • Chinese Academy of Sciences (China) • Nordiska Africainstitutet (Sweeden) • Parliament Library of Sweden (Sweeden) • Baker College (USA) • Seoul National University (Korea) • National Library of the Czech Republic (Czech Republic) • Royal Holloway University of London (UK) • Zhengzhou University (China) • Fraunhofer Gesellschaft (Germany) • Wyoming Community Colleges (USA) • State Teachers College (Israel) • Temasek Polytechnic (Singapore) • Southwest Research Institute (USA) • Universität Linz (Austria) • Universita di Ferrara • National University (USA) • University of Adelaide (Australia) • National Library of Estonia (Estonia)

SFX 2,544   **MetaLib** 1,746   **bX** 1,341

2013: A Good Year for Alma

Alma is live at 69 institutions worldwide and additional 52 institutions are in implementation phase

- **330 institutions (including 5 consortia)**

- **60+ institutions switching from non-Ex Libris ILS**

- **From ex-small to ex-large libraries**

- **12 countries worldwide**

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We Are Live!

"In the spirit of collaboration, innovation, and partnership, we are willing to share our journey and story with others. We are looking forward to collaborating with other libraries, by sharing resources and support."

Alma Institutions

University of Windsor(Canada) • Northwestern University (USA) • Macquarie University (Australia) • University of Otago (New Zealand) • Hochschule Mittweida (Germany) • University of Idaho (USA) • University of Washington (USA) • Oregon State University (USA) • Washington State University (USA) • University of Manitoba (Canada) • Chemeketa Community College (USA) • University of Oregon (USA) • Eastern Oregon University (USA) • Lewis & Clark College (USA) • Marylhurst University (USA) • Oregon Institute of Technology (USA) • Pacific University (USA) • Europische Akademie Bozen (Italy) • Bibliothek am Guisanplatz (Switzerland) • Coventry University (UK) • Brandeis University (USA) • Tarrant County College (USA) • BIBSYS (Norway)•National College of Natural Medicine (USA) •Curtin University of Technology (Australia) • Seattle University (USA) • Southwest Research Institute (USA) • California State University, Sacramento (USA) • University of Mannheim • London School of Economics

Alma
330

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Aleph, Voyager, Rosetta, DigiTool, Verde

National Library of Russia (Russia) • Chinese
Academy of Social Sciences Library (China) •
University of Birmingham (UK) • Pontificia Universita
Urbaniana (Italy) • Chinese Academy of Sciences (China) • Austin
Presbyterian Theological Seminary (USA)   • Howard University (USA) •
Brigham Young University (USA) • University of Utah (USA) • National
Library of Israel (Israel) • National Library of Austria (Austria) •
Sächsische Landesbibliothek (Germany)   • Corporacion Santo Tomas (Chile) •
Centro Cultural Tijuana (Mexico) • Universidad Tecnologica de Bolivar (Colombia) •
National Library of Tajikistan • Zhengzhou University (China) • Université Versailles
Saint Quentin • Agricultural Institute of Information •   NALIS Foundation (Bulgaria)

Aleph	Voyager	Verde	DigiTool	Rosetta
2,598	1,370	230	196	22

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Operations

Corporate

Solutions

Operations

Customers

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Investing for Long-Term Growth

Employees – Our Competitive Advantage

63 new employees worldwide in 2013

77 job changes/promotions worldwide

We have the largest development organization in our industry

Expanding our cloud organization

Growth in Headcount

Year	Headcount
2010	504
2011	506
2012	512
2013	541
2014	568

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Ex Libris Data Centers Worldwide

Chicago

EQUINIX | 1,300

Amsterdam

EQUINIX | 230

Singapore

EQUINIX | 10
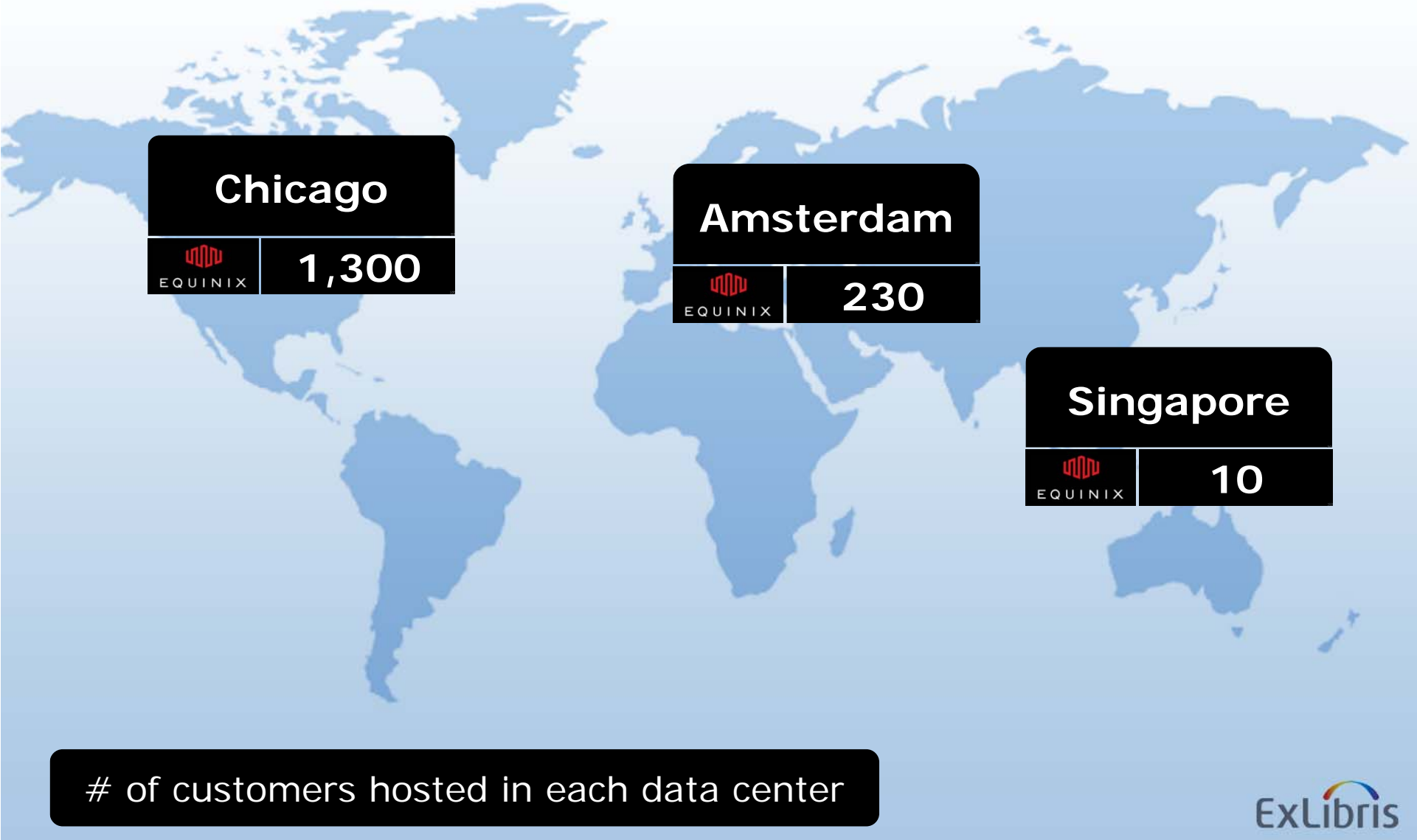
# of customers hosted in each data center

ExLibris

Ex Libris Achieves ISO 27001 Certification

- **ISO/IEC 27001:2005 is the most rigorous global security standard**

- **In addition**
  - **Our data centers are SSAE-16 certified (formerly SAS-70)**
  - **We comply with the US-EU Safe Harbor Framework**

Salesforce CRM

ANZ Customer Care

- Nina Keren-David

- Noa Perez relocated to APAC

- OBJECTIVES

  ✓ Improve support and service level

  ✓ Increase customer satisfaction

  ✓ Improve communication with customers

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Solutions

Operations

Customers

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Working with the Entire Community

- ## Supporting open access

- ## Members of the PREMIS Committee

- ## Taking an active role in NISO initiatives:

  - ### Open Discovery Initiative (ODI)

  - ### Open Access Metadata and Indicators (OAMI)

  - ### Knowledge Base And Related Tools (KBART)

  - ### Demand Driven Acquisition of Monographs Working Group Roster (DDA)

  - ### NCIP Standing Committee

  - ### Standard Interchange Protocol (SIP)

- ## Participating in research projects:

  - ### PrestoPRIME

  - ### SCAPE

Collaboration with Our Customers

- **Alma community zone advisory group**

- **Voting process for enhancements**

- **Voting process for OPAC functionality in Primo**

- **Product working groups**

- **Testing teams for new CRM system**

- **Joint focus groups**

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Thank You