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Trends in the library technology market – A UK perspective

Ken Chad looks at the underlying issues and trends that are shaping library technology. His piece focuses on public libraries and libraries in higher education institutions.

IN public libraries the library management system (LMS) is no longer the central piece of library technology it was.

In his 2020 Library Systems Report, Marshal Breeding noted, ‘Technology for public library automation has been mired in stagnation’.¹

UK public libraries have seen a steep decline in the core service of book loans. In these terms, use of public libraries is now 70 per cent less than it was in 2000.² Cuts in spending in the last decade have exacerbated the situation. Since 2010/11, library net expenditure has declined by 37 per cent in real terms.³

It is no surprise then that the annual revenues that vendors can obtain from library systems has diminished significantly and this contributes to the stagnation in library technology that Breeding notes. In 2019 Cheshire West and Chester Council issued a Request For Information (RFI) for a joint library management system (LMS) that stated the, ‘indicative annual budget for this provision is £18-£20,000’. It would have been more than double that a decade ago.

Shared services are a key strategy in reducing costs and, in the UK, most library authorities are part of a shared LMS service. In Wales, a single LMS for the country was expected to, ‘save authorities up to 70 per cent on automation costs’.⁴ For vendors, these consortia can be a boon or a nightmare. Winning a shared service LMS contract can increase market share dramatically. For example, winning the London Libraries Consortium in 2018 gave SirsiDynix 19 new

library authority customers at a single stroke – nearly 10 per cent of the UK public library market. Losing means a huge loss in market share, prestige and, of course, revenues. It’s a tough business. In December 2020 Capita announced that it had agreed to sell its Education Software Solutions (ESS) division which is the home of the Capita LMS businesses. It judged these no longer formed part of its core business.

In the UK public libraries are protected by their status as a statutory (mandatory) service but there is little sense of them being a core activity. Instead you get the sense local authorities are not sure how libraries fit in with their strategic goals. In 2017 Northamptonshire council set out proposals to axe up to 28 of the county’s 36 libraries.⁵ If councils are not clear about the goals of a public library service it should not be surprising that the investment they are prepared to make in library technology solutions is low.

Libraries in Higher Education

HE institutions are driven by two core (revenue generating) activities: teaching and learning and research. Libraries are judged primarily by their ability to support those activities. The LMS is losing its value.

Journal articles form the major resource provided by HE Libraries, with subscriptions typically taking up over 75 per cent of their resource budgets. A library system may be used to manage those subscriptions but, unlike books, journal articles are neither catalogued nor circulated by the LMS. The move to open access may make the management of subscriptions largely redundant. Even the role of the



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ubiquitous library discovery system is under question. “Discovery happens elsewhere” is a widely acknowledged refrain.⁶ Indeed many undergraduates don’t need to ‘discover’ resources at all: their reading list, embedded in the virtual learning environment/learning management system tells them what they need and provides a link to it. There is a dichotomy too about what constitutes a resource that is managed (and paid for) by the library (e.g. journal articles and books) and what is a learning resource (e.g. course resources and content, increasingly including digital textbooks, lectures etc) that is typically managed in the virtual learning environment (VLE) and paid for from the learning budget. The LMS/LSP has almost no role to play in managing or delivering these ‘learning’ resources.

New problems for old: What are library technology companies doing?

While vendors can’t yet abandon the LMS with its long term customers and steady income they need to address higher value problems to enable libraries to be

more relevant to their parent organisations and users/patrons.

Public libraries: Community/patron engagement

Public libraries are looking for better tools to engage their communities. The increasing diversity of print and electronic resources available to library customers has exposed how far behind, compared to commercial content services, libraries are in terms of deep user engagement. Better, more effective ways to engage users is becoming a key requirement. It was a core component of the London Libraries Consortium requirement for a new library services platform. SirsiDynix now offers a community engagement platform (CEP)⁷ and in February 2020 Civica announced its new latest Spydus LMS upgrade with enhancements to 'focus on enhancing digital engagement for library staff and patrons'.⁸

HE Libraries

In the UK, an institution's performance in the Research Excellence Framework (REF) and Teaching Excellence Framework (TEF) are critical to funding.

Research

An analysis of the 2014 Research Excellence Framework (REF) reported bleakly:

It is striking that over a third of environment statements (37.7 per cent) made no direct reference to the institutional library or librarians, not even just to mention the library collections. A similar number (36.5 per cent) only briefly referenced the library or librarians.⁹

Nevertheless there is a growing awareness of how university RIM [Research Information Management system] workflows are increasingly intersecting with those in the library. Librarians, 'should see this as an opportunity to draw a new map of support and services for researchers.'¹⁰ There is clear opportunity for librarians and university research office staff to work more closely to deliver a more coherent approach to benefit researchers. Some library technology vendors, notably Ex Libris, recognise this opportunity and are responding with new solutions.¹¹

Teaching and Learning

In little over a decade, from 1998 to 2010, universities in England and Wales increased their prices (tuition fees) by a hefty 800 per cent.¹² In an increasingly 'marketised' HE environment it is not surprising that students are impatient if the university cannot deliver the resources they need. Some universities responded by providing students with devices preloaded with relevant content bypassing any need to use the LMS. In 2015 Middlesex University invested over £2 million in its programme to provide



students with free core e-books.¹³ Where library system vendors have developed solutions to support teaching and learning it is predominantly in the area of reading lists. For a decade Talis led the field with its Aspire solution but in 2015 Ex Libris launched their *Leganto* solution and in 2016, SirsiDynix, announced its 'BLUE-cloud Lists' solution.¹⁴

Conclusion

Libraries need new approaches to technology to support changed needs. Many current library systems vendors are mired in supporting legacy LMSs that hamper them in delivering the transformative approach needed. Only those that can deliver new higher value solutions will thrive in the longer term. **BG**

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