

## Section 1 – Executive Summary & Key Messages

### Contents

|       |                                    |    |
|-------|------------------------------------|----|
| 1.1   | EXECUTIVE SUMMARY.....             | 5  |
| 1.1.1 | <i>Context</i> .....               | 5  |
| 1.1.2 | <i>Scope</i> .....                 | 5  |
| 1.1.3 | <i>The Report</i> .....            | 5  |
| 1.1.5 | <i>Recommendations</i> .....       | 6  |
| 1.2   | BACKGROUND AND CONTEXT.....        | 6  |
| 1.3   | NEW REQUIREMENTS.....              | 7  |
| 1.4   | THE LMS MARKET.....                | 7  |
| 1.5   | BUSINESS MODELS.....               | 8  |
| 1.6   | SERVICE DEVELOPMENTS.....          | 8  |
| 1.7   | TECHNOLOGY DEVELOPMENTS.....       | 9  |
| 1.8   | RECOMMENDATIONS FOR LIBRARIES..... | 9  |
| 1.9   | ROLE FOR JISC & SCONUL.....        | 10 |

## 1.1 Executive Summary

In autumn 2007, JISC and SCONUL jointly commissioned the Library Management Systems Study to undertake an evaluation and horizon scan of the library management and related systems landscape for UK Higher Education.

The LMS study was conducted by a consortium of Sero Consulting Ltd, Glenaffric Ltd and Ken Chad Consulting Ltd.

The report was published in April 2008, thanks to input from exactly 100 UK HE libraries, all the major LMS vendors and the Reference Group drawn from the UK and the international community.

### 1.1.1 Context

This is a period of uncertainty and change for HE libraries in terms of institutional priorities, user perceptions, globalisation of services and communities and new technologies. Users expect ease of discovery, workflow and delivery influenced by major web companies such as Google and Amazon and Web2.0. In this context, JISC is working towards an Information Environment for learning, teaching and research, involving deep integration of services and resources within the personal, institutional, national and global landscape. As central service providers, HE libraries are raising questions about the role, interoperability and value of their systems.

### 1.1.2 Scope

Based on a combination of desk research, online survey instruments and consultation, the study aimed to position library systems in this context.

- To evaluate the supply and demand sides of the LMS / ERM market
- To quantify systems market share, procurement patterns, costs, product differentiation and value.
- To conduct a horizon scan focused on the role of library systems amidst the shift from 'content to context'.
- To assess the emerging use of SOA, open standards and Open Source

### 1.1.3 The Report

The report consists of 5 sections designed to be studied together or independently.

- Horizon Scan
- Library Survey Analysis plus statistics from 100 UK HE libraries
- Vendor Perspectives
- Reference Group Feedback
- A practical guide for librarians making systems decisions

### 1.1.4 Findings

LMS Market - The UK market is mature, dominated by four vendors with relatively little product differentiation. Movement in product replacement is slow and customer loyalty to their LMS vendor is high. Many Libraries remain unconvinced about Electronic Resource Management systems and the take-up of new developments such as vertical search is relatively low.

Service Developments - The ability to aggregate user behaviour has significant potential for discovery services, based on click streams, context and personalisation. Nevertheless libraries are not yet exploiting intelligence about user habits to enhance their position in the information value chain. Libraries are however increasingly aware of the need to 'liberate' their data for users to create new services and applications. Consequently, services like the institutional OPAC will become challenged and the traditional LMS could be reduced to back-of-house functions.

Systems Approaches – Key technological responses include development of open interfaces within a Service Oriented Architecture and developing Web 2.0 models. However, the implementation of an open source LMS is not yet regarded as beneficial. Whilst there is widespread use of Information Environment services from JISC Data Centre's such as EDINA and MIMAS, further development of open interfaces is required.

### **1.1.5 Recommendations**

The study recommends libraries invest in systems with caution but not complacency, emphasizing that, whilst the library function has continuing and potentially growing value, the role of 'conventional' library may appear increasingly unclear.

- Libraries reviewing LMS contracts should seek increased value, looking at ways to improve services by implementing features around the core LMS.
- The focus on breaking down barriers to resources is endorsed, involving single sign on, unifying workflows and liberating metadata for re-use.
- SOA-based interoperability across institutional systems is emphasised as the foundation for future services and possibly the de-coupling of LMS components

There is consensus that the time is right for intensified dialogue about the nature and function of the modern HE library, its systems and processes. It is especially timely to explore consortia and other partnership arrangements to increase critical mass and network effect, whilst potentially reducing system and service costs.

Responding to these business needs, JISC & SCONUL are encouraged to work jointly with the community to develop and enhance understanding of Library 2.0 and the potential role of the international e-Framework. There is also a vital role in developing strategic engagement with the LMS vendors, with a focus on business process and user workflow review.

The key messages are summarized hereafter under the following headings

- Background & Context
- New Requirements
- The LMS Market
- Business Models
- Service Developments
- Technology Developments
- Recommendations for Libraries
- Role for JISC & SCONUL

## **1.2 Background and Context**

### **1.2.1**

Changes in society and technology are impacting significantly on UK HE libraries and consequently on their management systems. Demographic changes, political and economic drivers are affecting university services and funding structures, and a 'new realism' of pragmatic economic and business considerations presides.

### **1.2.2**

Library management systems have developed in response to technical advances and user requirements, mainly in developing electronic interfaces, refining standards and access protocols, purchasing and acquisition processes and cataloguing systems.

### **1.2.3**

Increasing globalisation of goods, services and communities means that technical platforms are now developed on an international basis and implemented for a worldwide network of users and contributors. A new market for library services and information provision has emerged, with Google and Amazon as a de facto paradigm and metaphor for discovery and delivery.

### **1.2.4**

Within this context, perceptions of the role and function of the university library are changing, developing and often conflicting, particularly in relation to the provision for collection and circulation, resource discovery, ownership and control, personalisation and seamless access to resources. Enhancing usability and accessibility for an increasingly diverse user community is of increasing importance for libraries.

### **1.2.5**

Today's library users expect speed and immediacy of information discovery, one-stop access to aggregated services, user-generated open content, and personalised, workflow-related delivery to the desktop.

### **1.2.6**

Institutional spend on the LMS is relatively small compared to other core corporate systems. There is an increasing drive for cost reduction through institutional workflow review, systems integration and the streamlining of corporate functions.

### **1.2.7**

Against this background, a consensus is emerging that the time is right for dialogue in the profession and beyond to prompt a fundamental rethink about the nature and function of the modern HE library, the systems and processes that need to be managed, and a reconsideration of the business case for the library itself.

## **1.3 New Requirements**

### **1.3.1**

Web 2.0 and its corollary Library 2.0 represent a new way of thinking and working that has profound implications, not least in terms of questioning traditional concepts of authority and value, but also in the opportunities presented for networking, developing and sustaining communities of practice, user-generated content and the aggregation of resources.

### **1.3.2**

Libraries must deal with new sources of information that students are increasingly building into their learning experiences. Many claim to be offering Web 2.0 opportunities for engaging users, but these seem in the main to be limited to the provision of blogs and wikis.

## **1.4 The LMS Market**

### **1.4.1**

The LMS market in the UK is mature, and demand is relatively stable. It is dominated by four principal vendors with relatively little product differentiation. Movement in product replacement is slow and customer loyalty to their LMS vendor is high. Opportunities for dramatic growth are therefore limited.

#### **1.4.2**

The UK LMS market is relatively insignificant in the global corporate context. Two of the main LMS vendors are private equity companies with a business emphasis on return on investment in developing products and markets.

#### **1.4.3**

Libraries currently remain unconvinced about the return on their investment in electronic resource management systems. The take-up of new developments such as vertical search products is relatively low. This may be due in part at least to slow procurement cycles.

### **1.5 Business Models**

#### **1.5.1**

The business case for the library is predicated on the assumption that the library is the authoritative source of information, and presents optimum access to the best and most appropriate resources in the most efficient way. This raises a dynamic tension between 'reliable' and 'suspect' sources and questions about the nature of authority.

#### **1.5.2**

Part of the business case review for libraries includes a consideration of their potential role as a corporate information management resource.

#### **1.5.3**

Vendors have developed vertical search products in response to a perceived gap in Google's contextual searching provision. Fundamentally their system developments start with the collection and add search functionality. By comparison, Google's free library service, with its global reach, based on advertising revenue, starts with search functionality and adds collection functionality.

### **1.6 Service Developments**

#### **1.6.1**

The ability to aggregate user behaviour has significant implications for the potential relevance and immediacy of resource discovery services based on click streams, data aggregation, personalisation and contextual information searching.

#### **1.6.2**

Libraries are not yet exploiting the metadata they are able to collect about user habits and needs as an asset in a network economy to consolidate their position in the information value chain.

#### **1.6.3**

Libraries are increasingly aware of the need to 'liberate' their data to allow users to create new and innovative services and applications. To do so their platforms will require easy-to-use and accessible services for discovery and delivery.

#### **1.6.4**

Once open to that model, services such as the individual institutional OPAC will become seriously challenged. The LMS may be reduced to a set of back-of-house systems.

## **1.7 Technology Developments**

### **1.7.1**

There are a number of possible technological solutions to the challenges facing libraries and the LMS. These include a web services-based approach, open source systems and the development of open interfaces within a service-oriented architecture.

### **1.7.2**

The procurement and implementation of an Open Source LMS is not workable for most institutions in the current climate, largely because of the staff capacity and support overheads, but also because the mission criticality of library systems requires users and procurers to have confidence in a robust system. However, Open Source developments are a valuable catalyst for change in terms of exploring possibilities and pushing boundaries for the community.

### **1.7.3**

Vendors view Open Source software developments as an important trend, but most see the value of open source developments mainly in reducing costs by providing low-cost components for their applications.

### **1.7.4**

There is widespread use in libraries of JISC Information Environment services such as those provided by Edina and MIMAS. There is a need for further development of interfaces to exploit the potential of the IE for library service development. This clarifies the relevance of the e-Framework at the practical level of web services and confirms its enabling role.

## **1.8 Recommendations for Libraries**

### **1.8.1**

The study recommends that libraries invest in systems with caution but not complacency, emphasizing that, whilst the library 'function' has continuing and potentially growing value, it is not clear what role 'conventional' library services should play.

### **1.8.2**

Libraries reviewing and renewing LMS contracts should seek increased value from their LMS investment, looking at ways to improve services by implementing features around the core LMS.

### **1.8.3**

The common focus on addressing barriers to resources is endorsed, involving single sign on, unifying search and access, liberating library metadata for re-use and exposing resources via a variety of routes.

### **1.8.4**

Libraries should work internally to develop interoperability across institutional systems based on a Service Oriented Architecture; this will lay vital foundations for future services, possibly involving the de-coupling of LMS components

### **1.8.5**

Given this context, it is timely to explore consortia and other partnership arrangements, especially between HEIs, to increase critical mass and network effect whilst reducing system and service costs.

## **1.9 Role for JISC & SCONUL**

### **1.9.1**

The study confirms that SCONUL is encouraged to work with its members to develop and enhance understanding of Library 2.0 and the potential role of the JISC e-Framework in responding to the business needs of the university library.

### **1.9.2**

There are opportunities to engage with reference groups in the wider development community to inform and be informed by current developments in open standards, systems integration and web services.

### **1.9.3**

There is a clear role for JISC and SCONUL in finding the appropriate platform and developing a shared agenda for strategic engagement with the LMS vendors.

### **1.9.4**

JISC and SCONUL are encouraged to continue to facilitate communication and networking between and among institutions with a key focus on business process review.

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