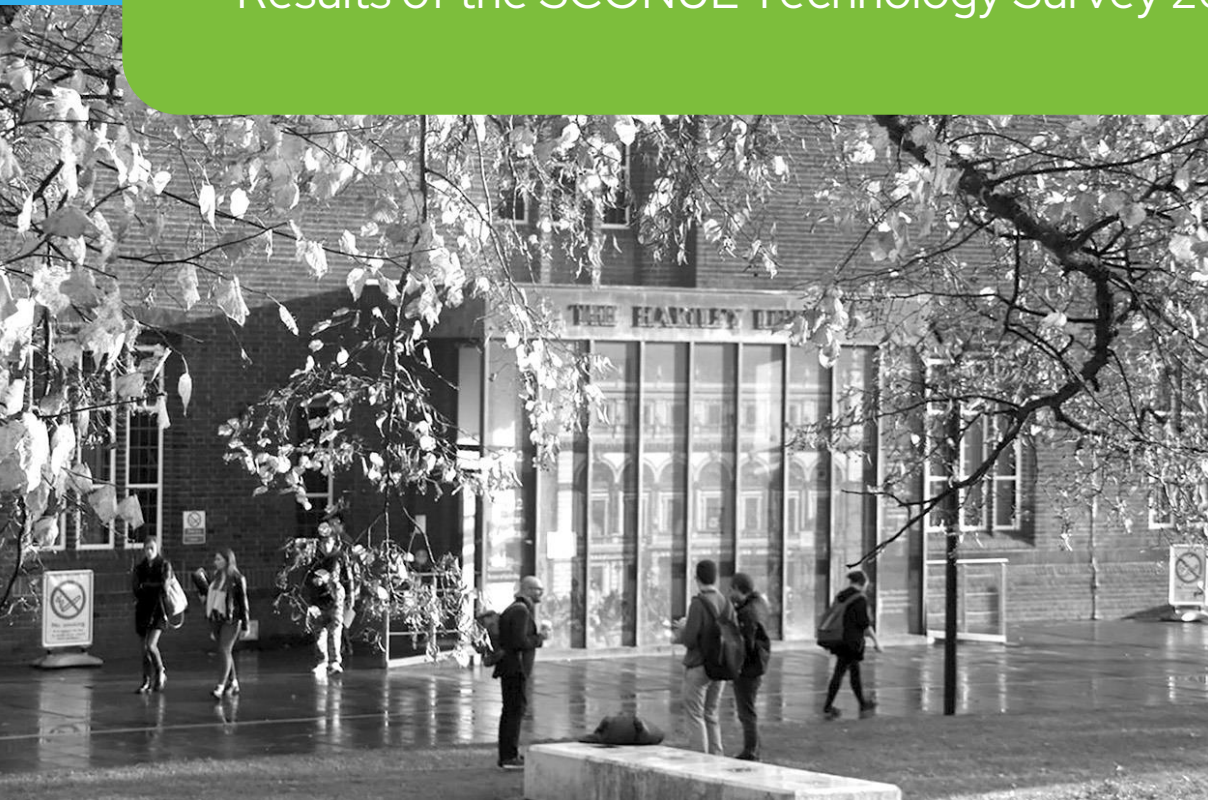




# The Library Technology Landscape

## Results of the SCONUL Technology Survey 2024



## Contents

1. Introduction .....	1
2. Methodology .....	3
3. Contextual information .....	5
4. Discovery .....	7
4A Core resource discovery solutions .....	7
4B Products and services to enhance discovery .....	12
5. Identity management .....	17
6. Journal management .....	21
6A Journal subscription management .....	21
6B Management of open access journals .....	25
7. Administration of open access .....	29
8. E-book or e-textbook management .....	34
9. Library management systems .....	39
10. Library space and service management .....	43
10A Self-service .....	43
10B Laptop and equipment loans .....	47
10C Gate entry solutions .....	50
10D Library and learning spaces management .....	54
10E Enquiry management .....	58
11. Shared catalogues .....	62
12. Institutional repositories .....	66
13. Research impact and support .....	70
13A Research impact measurement .....	70
13B Research support management .....	75
14. Archive management, digital repository and preservation solutions .....	78
15. Collection development .....	82
16. Resource sharing and ILL .....	86
17. Bibliographic record creation and supply .....	91
18. Analytics and management information .....	95



## The Library Technology Landscape

19. Resource/reading list solutions .....	100
20. Student training and information literacy .....	103
21. Virtual learning environment/learning management solutions.....	107
22. Open institutional publishing .....	110
23. The technology landscape .....	114
Emerging technologies/services.....	114
Use of AI .....	115
Use of AI tools on library websites.....	117
Technology concerns.....	117
24. Evaluation questions.....	120

## 1. Introduction

- 1.1. We are pleased to introduce the results of the first SCONUL Library Technology Survey which provides a comprehensive analysis of the technology landscape in the UK and Ireland for academic and research libraries. It covers a broad range of 26 library technology functional spaces and provides detailed profiles of the products and services used in those spaces, as well as assessments of their functionality and value for money.
- 1.2. It should act as a valuable reference guide for libraries allowing you to undertake scoping work for a new system with a full understanding of the market. This is one of the primary uses of the data and we are keen to hear feedback from SCONUL members on ways in which the survey can be refined and improved for its next iteration. This will run in Autumn 2026.
- 1.3. The picture it paints is one of real complexity where interoperable systems are supplemented by additional enhancement services. This overview of the market should provide a useful source of intelligence for SCONUL, university purchasing consortia and Jisc including helping identify areas where competition seems limited and where this is impacting on assessments of value for money or performance, or where performance is sub-optimal.
- 1.4. For example, the Library Management System (LMS) market shows a marked lack of competition coupled with dissatisfaction with value for money. The survey also shows libraries making wide use of services which supplement LMS functionality such as journal management tools and ebook and etextbook platforms to an extent which raises further questions about provision in this space.
- 1.5. The survey findings and subsequent analysis will allow the community and those acting on its behalf to influence the markets we depend on, through challenging poorly performing providers; identifying new market entrants and exploring the opportunity they bring; articulating clearly the needs of the sector to providers; and working in partnership with providers to help refine their understanding of libraries' developing requirements. For example, publisher dashboards scored poorly on value for money and functionality despite widespread usage and this is something we can raise directly with them.
- 1.6. The survey findings will also provide a solid grounding for the conversation the sector is having about the scope for the development of shared platforms and other services as it allows us to identify where institutions are using the same providers and how these are viewed.

- 1.7. We will also use the findings of the survey to surface new and innovative use of technologies. The Technology and Markets group will be delving further into these examples with a view to sharing knowledge with the sector about their use.
- 1.8. There are also opportunities for the community to use an analysis of the survey data to reflect on its own use of technologies. For example, there is a trend for patrons to move away from using library discovery tools, and 81% of institutions reported using more than one product or service to enhance discovery. It may be useful to explore whether this is providing what users need, which may not be clear as some respondents cited issues with tracking usage as a potential barrier to purchasing discovery enhancing products. This could be an area in which generative AI has a transformative impact.
- 1.9. We would like to thank all those involved in helping develop the survey. It has been a significant undertaking with a great deal of work going into its genesis and testing. It was the brainchild of the SCONUL Technology and Markets group and the design of the initial survey went through a lot of iterations, adding systems, adding new areas of activity and undertaking a large-scale pilot in 2023 before rolling it out to the community in 2024.
- 1.10. SCONUL would like to thank all those institutions which took part in the pilot; the members of the Technology and Markets Group for their leadership of the project; Sonya White, for her statistical analysis and writing of this report and Ken Chad and Associates for their initial work on the question set.



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## 2. Methodology

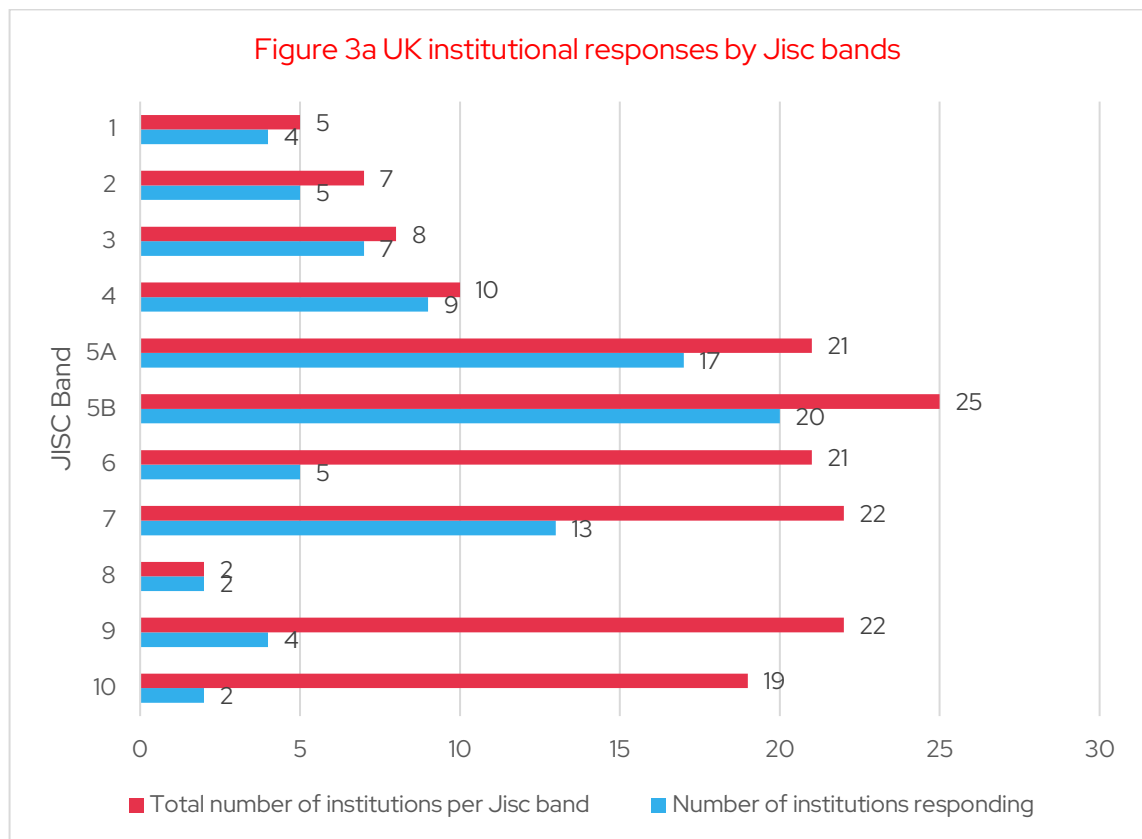
- 2.1. Overall, 96 respondents submitted a return to the 2024 technology survey, with the number responding to each area varying throughout. All responses are as supplied by respondents, except where they have noted that an 'other' product or service was used and the detail provided referenced one of the listed products or services. In these cases, the responses have been included as the listed product or service rather than counted within 'other'. It should be noted that it was not always clear whether the listed products or services incurred additional costs for institutions. In some cases, respondents chose not to provide value for money ratings where the product or service was free of charge, while others chose to rate them highly, and this will have an impact on the value for money ratings.
- 2.2. The survey asked respondents to indicate whether they used the listed products or services in each area; however, 'no' was not always selected for those services that were not used at responding institutions. Therefore, the data presented in the charts are based on the number of respondents indicating that they used any of the products or services, by either selecting 'yes' or by rating at least one system for either value for money or functionality. Occasionally respondents indicated that they used more than one 'other' product or service, therefore, the overall number of systems used will be higher than the number of respondents counted as 'other' in the charts.
- 2.3. Respondents were also asked to rate their level of satisfaction with the value for money and functionality of each system used at their institution using a five-point Likert scale, with a positive rating indicated by a choice of 'good' or 'very good'. To allow for average ratings to be calculated each point was given a numerical value as follows:
  - 1 = Very poor
  - 2 = Poor
  - 3 = Average
  - 4 = Good
  - 5 = Very good
- 2.4. The charts displaying the value for money and/or functionality ratings, along with those displaying the average ratings, are based on all products and services where ratings have been provided by five or more respondents. The ratings for the 'other' category are omitted from the charts as they were thought to provide minimal value; however, they are included in the full tables available on the SCONUL website. Notably, in some cases, the number of respondents rating a product for value for

money or functionality differed from the number of respondents indicating that they used that product.

- 2.5. Where more than five respondents indicated they used the same 'other' product, these have been included separately in all charts and tables rather than counted within 'other', unless noted otherwise. In the charts in the main section, all products and services are provided in their ranked order, with the most popular first. The full set of tables by question are included on the SCONUL website, with all products and services listed in their order in the survey, followed by the 'other' systems used at responding institutions.
- 2.6. The possibility of any relationship between the value for money and functionality ratings using chi-squared testing was investigated; however, there were insufficient data to perform reliable analysis.
- 2.7. Fisher's exact test was performed to assess the association between the use of a product or service and an institutions Jisc band (grouped), institutional expenditure on technology to support library services and functions and the staff FTE devoted to supporting library technology. This test was selected due to the relatively small sample size, as it ensures more accurate results in such instances compared to the chi-squared test. Where any statistically significant differences were found, these have been noted in the commentary, with statistical significance noted at the 1% level throughout. However, it is important to note that all testing is based on a maximum of 96 responses.
- 2.8. Respondents were given the opportunity to provide additional comments on each area of technology, with any emerging themes highlighted throughout the commentary. Often, the detail provided related to the use of the products and services at individual institutions and this additional detail has not been included, with specific products and services only mentioned where multiple respondents have made a similar observation.

## 3. Contextual information

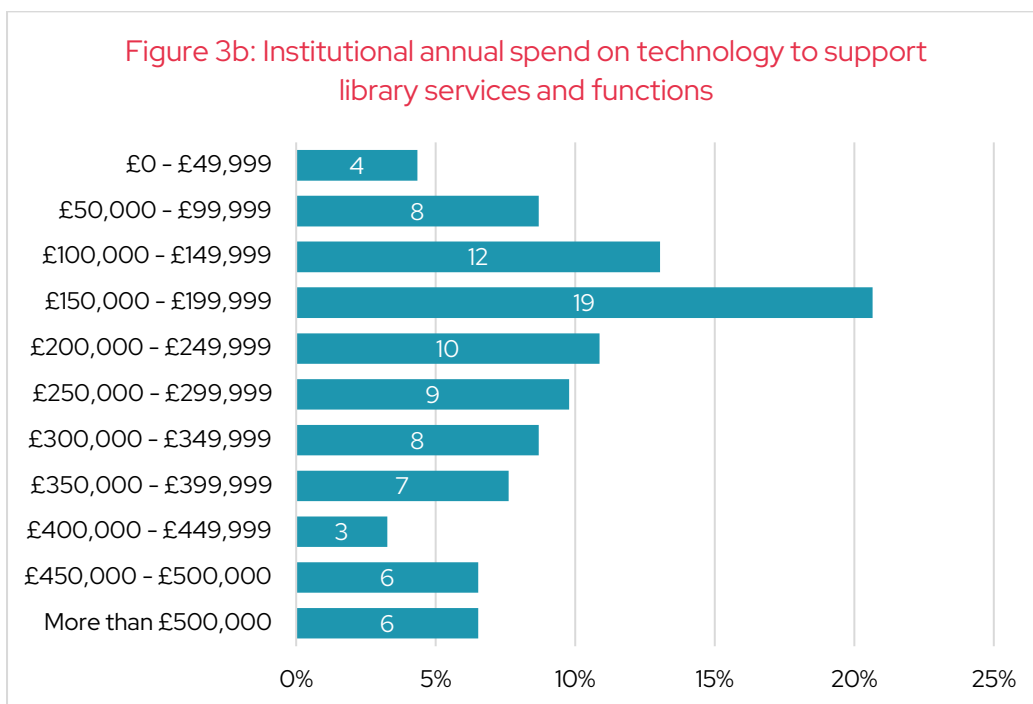
3.1. Figure 3a illustrates the Jisc Bands of responding UK institutions and highlights that responses were received from more than 70% of institutions in each of Jisc Bands 1-5B. For Band 6 the figure dropped to 24%, and for Bands 9 and 10 the figures were 18% and 11% respectively. We also received responses from eight Irish institutions which are excluded from Figure 3a but included in all other analysis below.



Percentages are based on 88 respondents.

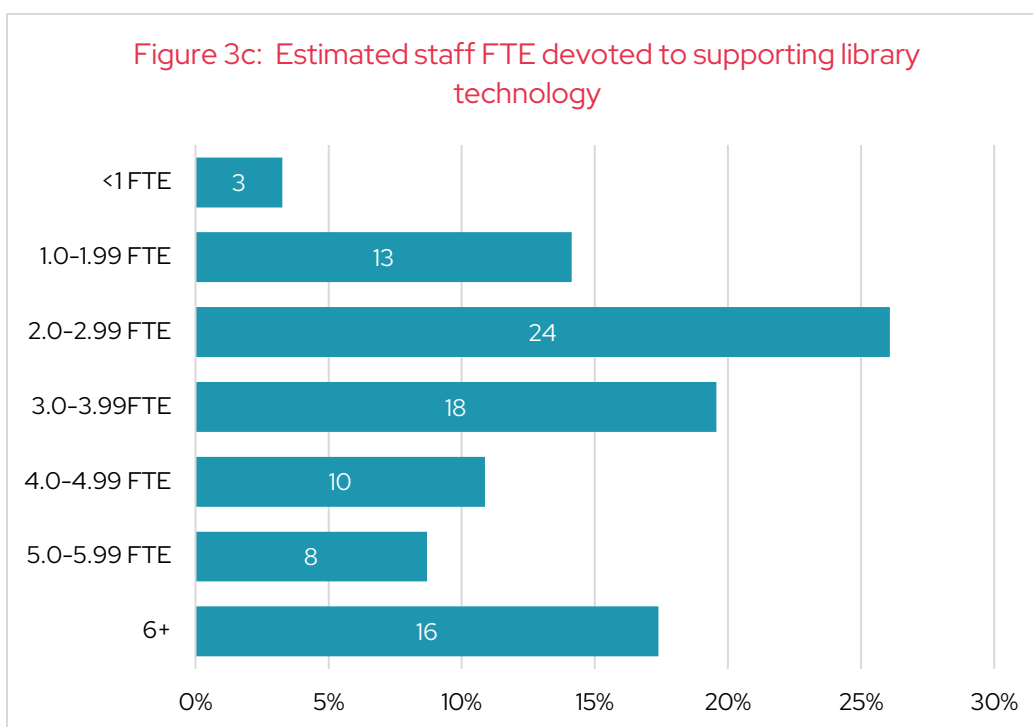
3.2. Respondents were asked to provide an estimate of their institution’s annual spend on technology to support library services and functions and Figure 3b (page 6) illustrates the wide range of expenditure across the sector. Overall, 92 respondents provided the information, with around one-fifth indicating that their institution spent between £150,000 and £199,999, while six respondents (6.5%) noted that their institution spends more than £500,000 per year on technology to support library services and functions.





Percentages are based on 92 respondents answering the question.

3.3. Figure 3c illustrates the wide range of staff FTE devoted to supporting library technology with responses grouped for illustration purposes. It is notable that, the number of staff FTE devoted to supporting library technology ranged from 0.2 to 65.5, with an average of 4.86.



Percentages are based on 92 respondents answering the question.

## 4. Discovery

### 4A Core resource discovery solutions

Survey respondents were asked the following:

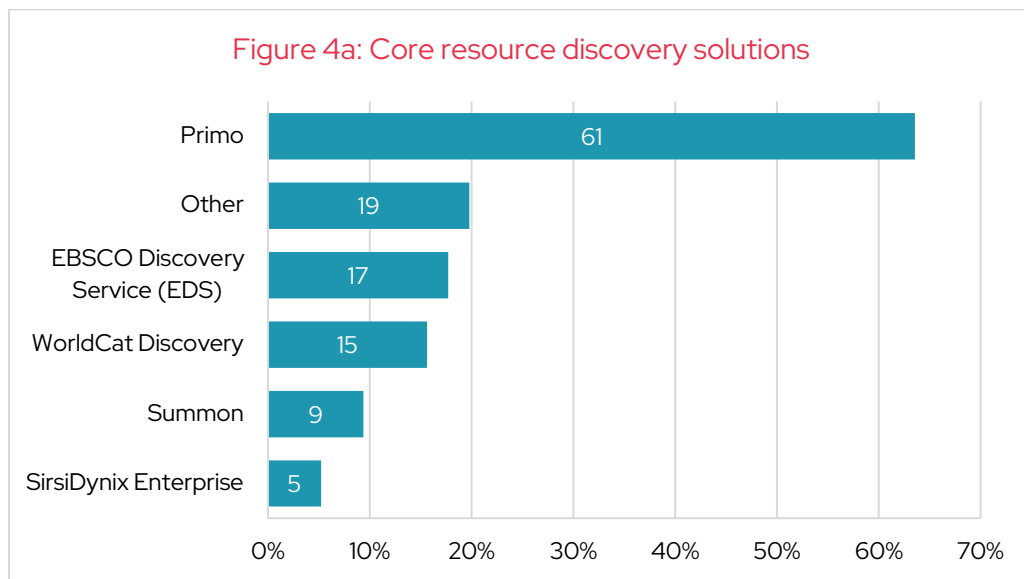
Core discovery tools is intended to include options that the majority of your users would start their journey when looking for content and resources. It is the main “platform” and does not include plug-ins or small specialist tools designed for a minority of users. It also does not include any other system where there is a technical link/integration into your core tool (so not your intranet or VLE).

Please include the following types of discovery solution:

- a library system online catalogue (OPAC) such as Enterprise from SirsiDynix, Prism from ESS or Encore for Innovative Interfaces
- services with a central index (e.g. Primo, Summon (Ex Libris/Clarivate), EBSCO Discovery Services or WorldCat Discovery from OCLC
- discovery layers without a central index for example open source VuFind, Blacklight, Aspen and federated search solutions such as Explorit (Deep Web Technologies/Amplifyfi)
- mobile 'app' solutions that are downloadable from an app store such as Campus M (Ex Libris/Clarivate) or Solus.

Please ensure you choose the product, not the vendor.

- 4.1. Figure 4a (page 8) highlights that Primo is the most popular core resource discovery solution and was used at 61 responding institutions (64%), while 17 respondents (18%) noted they used EBSCO Discovery Service (EDS), fifteen (16%) noted they used WorldCat Discovery, nine (9.4%) reported they used Summon and five respondents (5.2%) noted that SirsiDynix Enterprise was in use at their institution. Overall, 19 respondents indicated that they used at least one ‘other’ solution and these are listed in Table 1 (page 8).

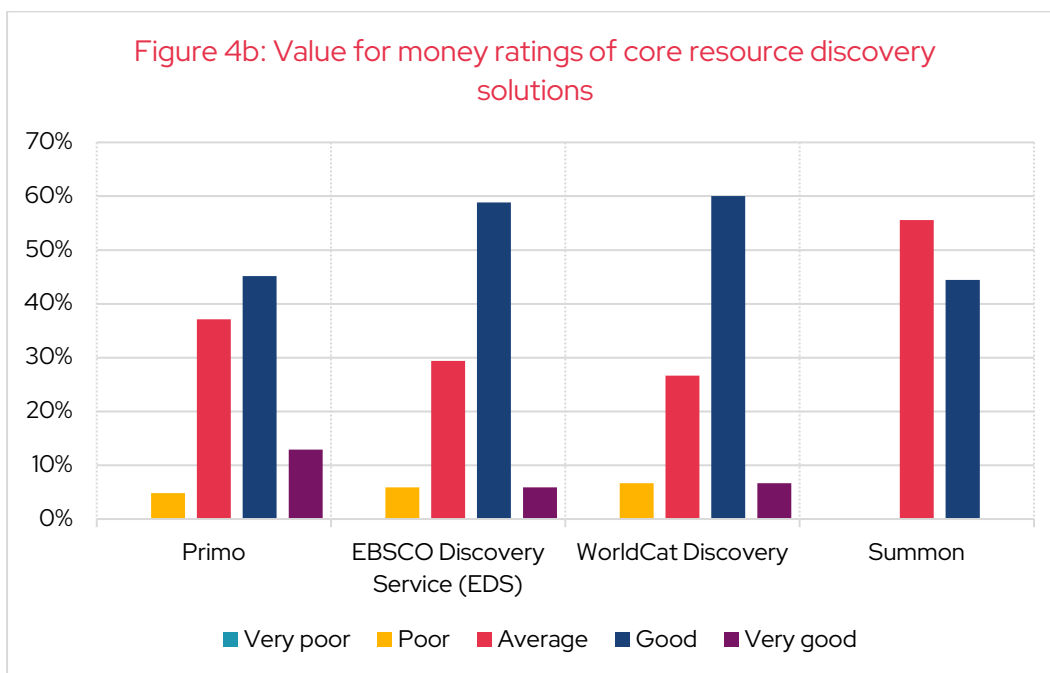


Percentages are based on 96 respondents indicating they used any of the products or services.

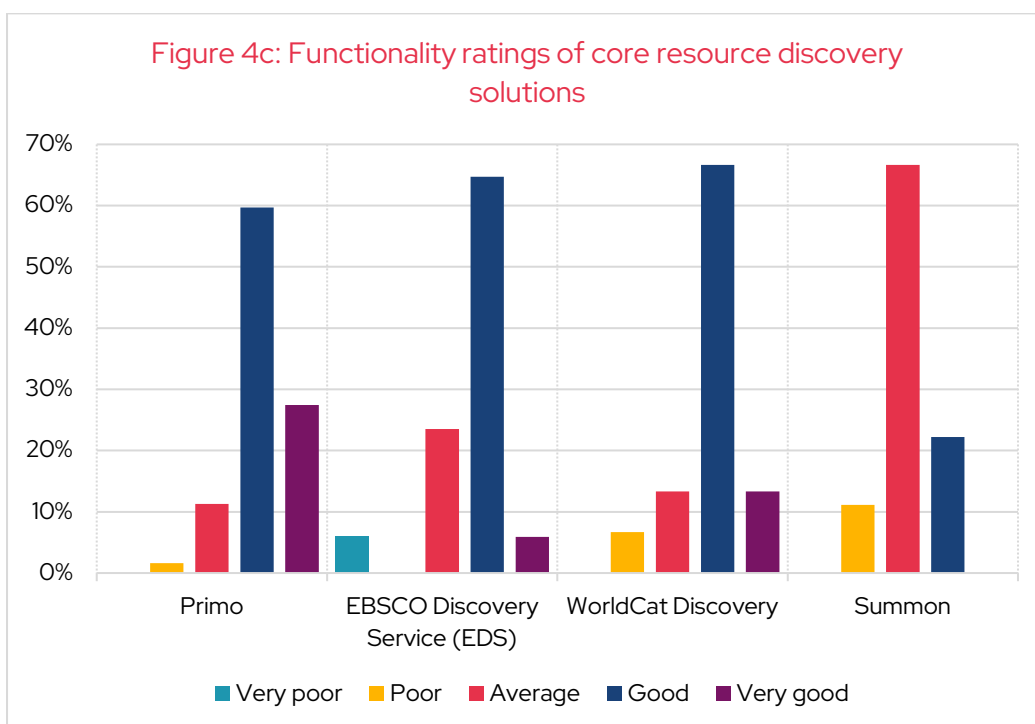
**Table 1: Other systems used for core resource discovery solutions**  
(number of respondents in brackets)

<ul style="list-style-type: none"> <li>• Calm (3)</li> <li>• CampusM (3)</li> <li>• Encore (3)</li> <li>• Prism (2)</li> <li>• VuFind (2)</li> <li>• Articles Plus (AMPLYFi) (1)</li> <li>• Figshare (1)</li> </ul>	<ul style="list-style-type: none"> <li>• Jisc Hub (1)</li> <li>• Library Hub Discover (1)</li> <li>• Primo VE (1)</li> <li>• Serials Solutions 360Core (1)</li> <li>• Solus Library App (1)</li> <li>• SpringShare A-Z Database List (1)</li> </ul>
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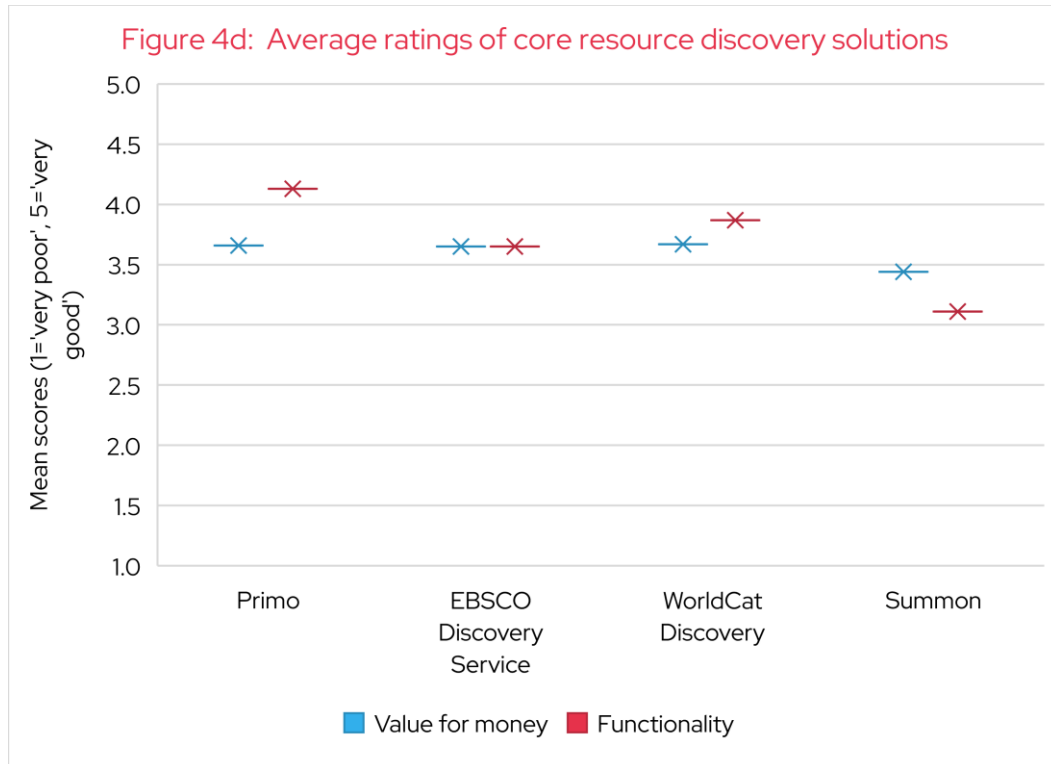
4.2. Figure 4b (page 9) displays the value for money ratings of the core resource discovery solutions and highlights that just over half of respondents rating Summon considered it to offer 'average' value for money, although it should be noted that this is only based on nine respondents. Primo is the most popular solution and was perceived to offer 'good' or 'very good' value for money by 58% of respondents rating it, while both WorldCat Discovery and EBSCO Discovery Service were rated positively by around two-thirds of respondents. SirsiDynix Enterprise was only rated for value for money and functionality by four respondents and has been omitted from the charts that follow.



4.3. Figure 4c compares the functionality ratings of the core resource discovery solutions and shows that just two of the nine respondents (22%) rating Summon considered it to provide 'good' functionality. Primo was the most popular solution and its functionality was rated as 'good' or 'very good' by 87% of respondents, with just one respondent rating it 'poor'. As with value for money, WorldCat Discovery performed well and was rated as 'good' or 'very good' by 80% of respondents.



4.4. Figure 4d displays the average ratings for value for money and functionality of the core resource discovery solutions, where '1' equals very poor and '5' equates to 'very good'. Primo was the most popular solution and Figure 4d highlights that it rates higher for functionality (4.1), on average, than for value for money (3.7). Overall Summon rated the lowest, on average, for both value for money and functionality and it is also one of the systems used at the fewest number of institutions.



4.5. Overall, just over half of respondents provided additional information on core resource discovery solutions, with several respondents noting concern with the lack of competition in this area:

*Increasing domination of the market by a small number of key suppliers is a concern; particularly where the supplier markets both content and platform and can enhance the discoverability of its content via its own platform.*

4.6. Several respondents also commented on issues with the search functionality and the ranking of results:

*...the results returned, or at least the ranking of them, is often baffling to staff and users alike.*

4.7. Some concerns were also raised with metadata:

*The metadata for content is crucial for a functioning system, but this can often be wrong with vendors not able to coordinate efforts to improve quality, leaving the library helpless in finding a resolution. Metadata from OA sources such as Unpaywall can be poor but they are by no means alone in that.*

4.8. While other respondents expressed concerns that, the current issues with discovery solutions, and the fact that they are some way behind commercial search engines for performance, is possibly seeing users move away from using library resources:

*Based on usage data, it's clear our users are moving away from library-managed discovery solutions and are either using Google/Google Scholar or other means of finding content.*

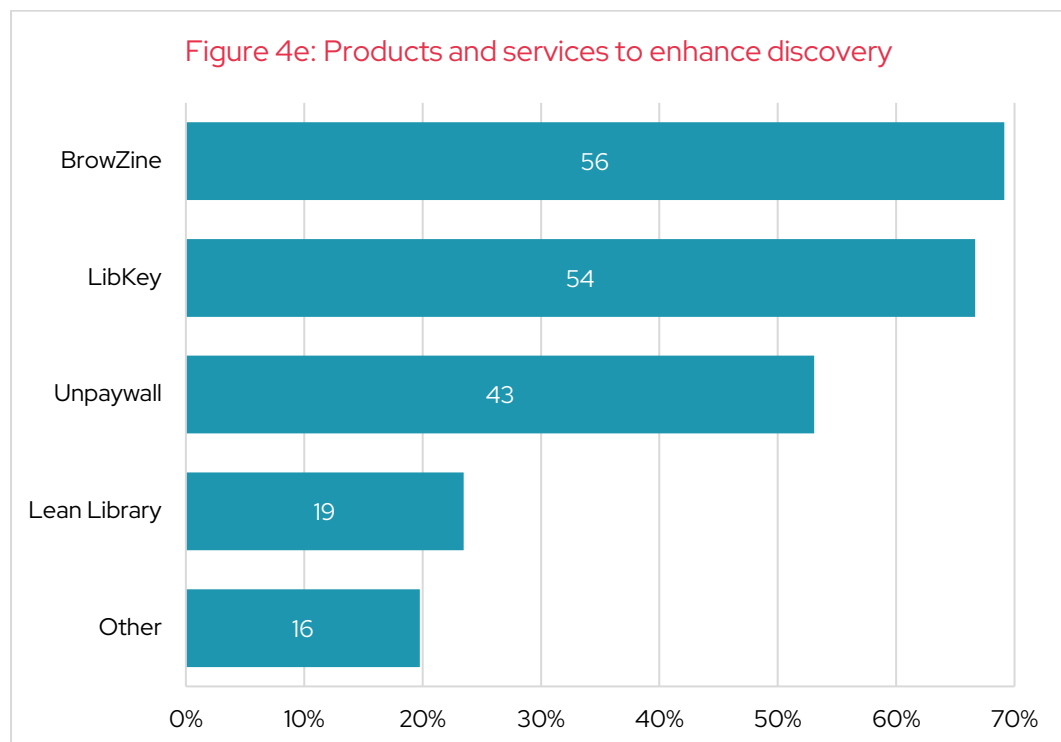
## 4B Products and services to enhance discovery

Survey respondents were asked the following:

Please include:

- journal reading solutions such as BrowZine
- browser extension solutions such as Lean Library, LibKey etc., that assume users start in Google, A&I databases or publisher platforms and provide links to library-licensed resources
- tools enabling access to open access/free-to-read resources such as Unpaywall and OA Button and aggregated services such as CORE
- linked data services such as those from SirsiDynix (BLUEcloud Visibility+) and OCLC.

4.9. BrowZine was the most popular product or service to enhance discovery (Figure 4e) and was used at 56 responding institutions (69%), closely followed by LibKey (54 respondents, 67%), Unpaywall (43 respondents, 53%) and Lean Library which was used at 19 responding institutions (23%). Overall, sixteen respondents reported using at least one 'other' solution and these are listed in Table 2 (page 13).

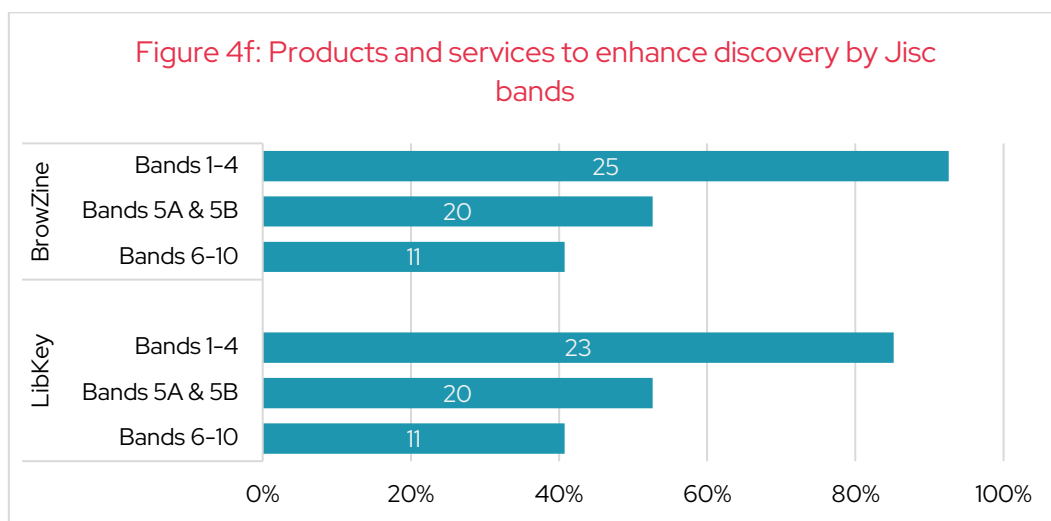


Percentages are based on 81 respondents indicating they used any of the products or services.

**Table 2: Other systems used to enhance discovery**  
(number of respondents in brackets)

<ul style="list-style-type: none"> <li>• EBSCOhost passport (3)</li> <li>• bX - recommender service (2)</li> <li>• CORE (2)</li> <li>• EThOS (2)</li> <li>• OA Button (2)</li> <li>• Syndetics Unbound (2)</li> <li>• BASE (1)</li> <li>• Bluecloud Visibility (1)</li> <li>• Google Scholar (1)</li> </ul>	<ul style="list-style-type: none"> <li>• DART (1)</li> <li>• EndNote Click (1)</li> <li>• GetIt service within PrimoVE (1)</li> <li>• JISC NBK (1)</li> <li>• LibKey Nomad (1)</li> <li>• OAHelper (1)</li> <li>• OpenURL - FindIt Button (1)</li> <li>• Stackmap (1)</li> </ul>
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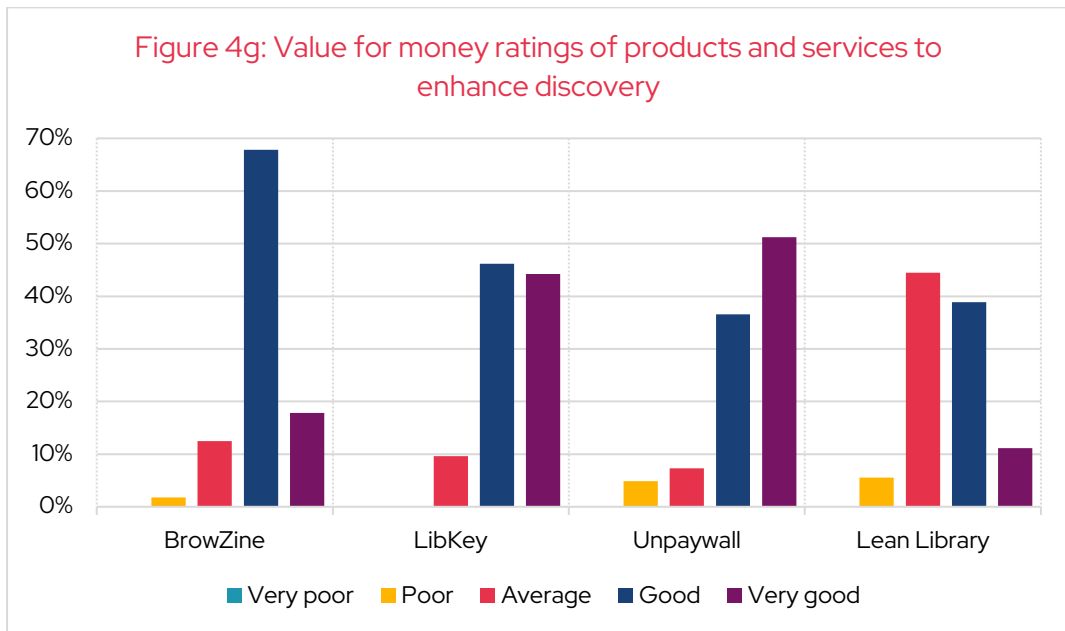
4.10. Notably, 66 respondents (81%) reported using more than one product or service to enhance discovery, with 38 (47%) indicating that three or more solutions were used at their institution.



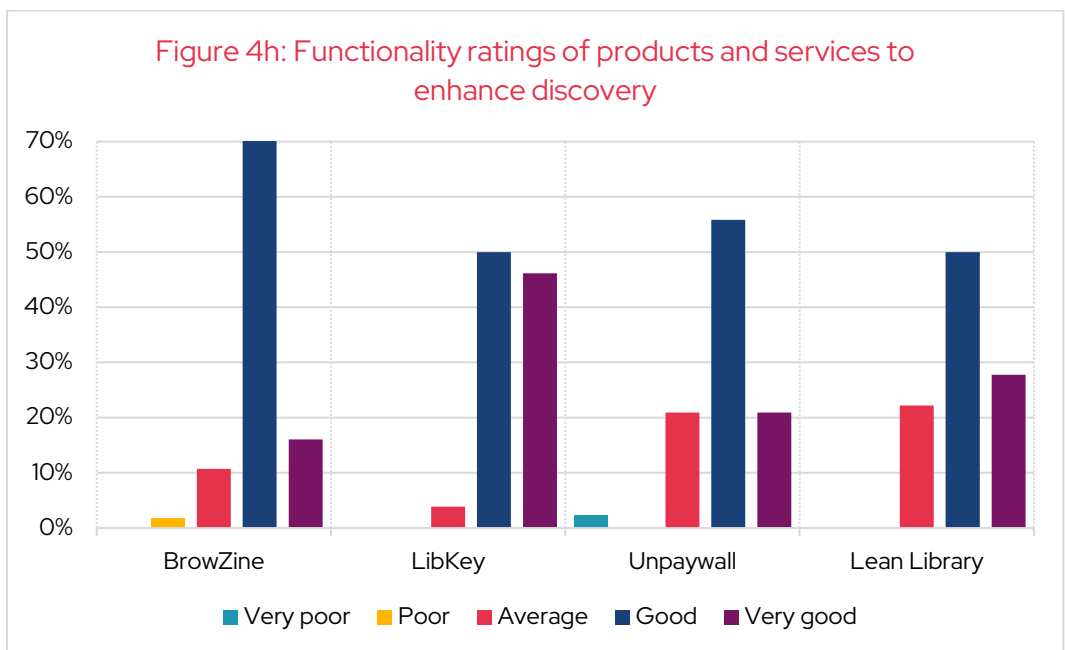
4.11. Figure 4f (page 14) highlights that there are statistically significant differences between the Jisc Bands, with responding institutions in bands 1-4 more likely to use BrowZine or LibKey than those in bands 5-10.

4.12. Figure 4g illustrates that around two-thirds of respondents rating BrowZine considered it to provide 'good' value for money, with a further 18% rating it as 'very good'. LibKey (90%) and Unpaywall (88%) were also considered to provide 'good' or 'very good' value for money by more than 80% of respondents rating these services. Lean Library is the least popular of the services and only half of respondents rated it positively, with a rating of 'good' or 'very good', for value for money.

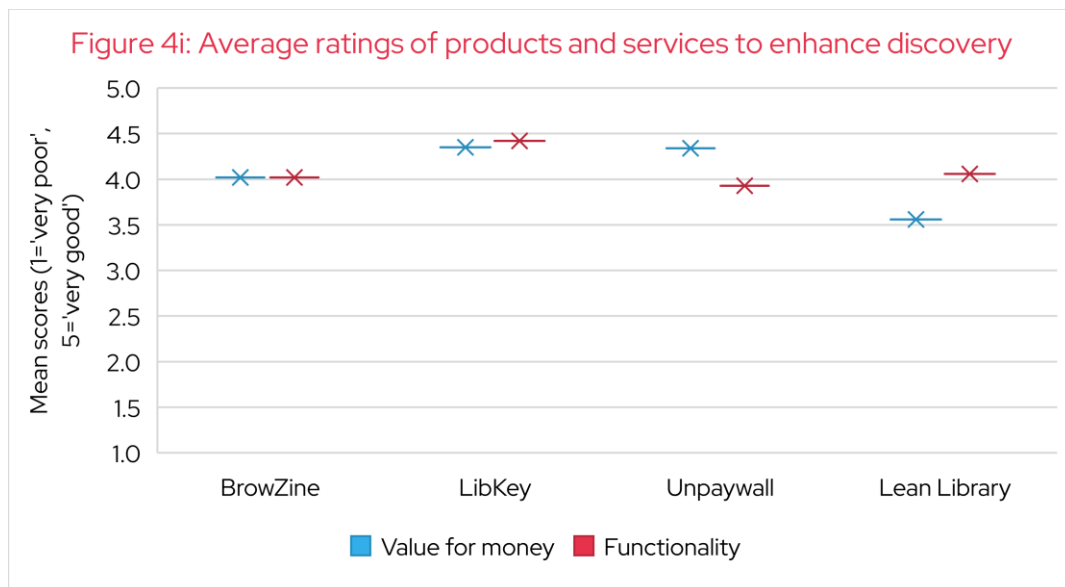




4.13. The functionality ratings of products and services to enhance discovery were also generally positive (Figure 4h), with 96% of respondents rating LibKey considering it to provide above average functionality, compared to just over three-quarters of respondents rating Lean Library and Unpaywall positively. Overall, there is some consistency in the ratings, with at least 85% of respondents considering the services to offer 'good' or 'very good' value for money, also rating their functionality as above average. Notably, all 47 respondents rating LibKey positively for value for money, also rated its functionality as 'good' or 'very good'.



4.14. Figure 4i illustrates the average ratings for value for money and functionality of the products and services used to enhance discovery. LibKey rated the highest, on average, for both value for money (4.3) and functionality (4.4). BrowZine also recorded similar results for both value for money and functionality, with average ratings of 4.0. Lean Library and Unpaywall saw the largest variances between the average ratings, with Lean Library achieving a higher mean for functionality (4.1) than value for money (3.6), while the reverse is true for Unpaywall, possibly owing to it being a free browser extension.



4.15. Supplementary comments were largely about specific products and services, with a mix of both positive and negative feedback. However, some cited issues with tracking usage as a potential barrier to purchasing discovery enhancing products:

*BrowZine is a potentially improved user interface to journals, but we have no idea how many people actually browse a journal (rather than search for an article). It's hard to argue that the improved user interface is worth the expense when that money could be spent on resources (books/journals).*

4.16. Others noted that since most of these resources are available as plugins or browser extensions, student uptake was often low, and securing support for institution-wide implementation was frequently challenging:

*Browser extensions (e.g. Lean Library, LibKey etc) - restrictions on adding these on institutional devices which would make it difficult to encourage students to use and for staff to support; would require buy in from IT to roll out on standard desktop image ...*

- 4.17. While others expressed frustration that these resources were not included with core products:

*Our goal as a sector should be to get to a point where, working with discovery service providers and publishers, there is no need for 'enhanced discovery' products such as LibKey. These add-ons should be part of core systems ...*

## 5. Identity management

Survey respondents were asked the following:

Please include:

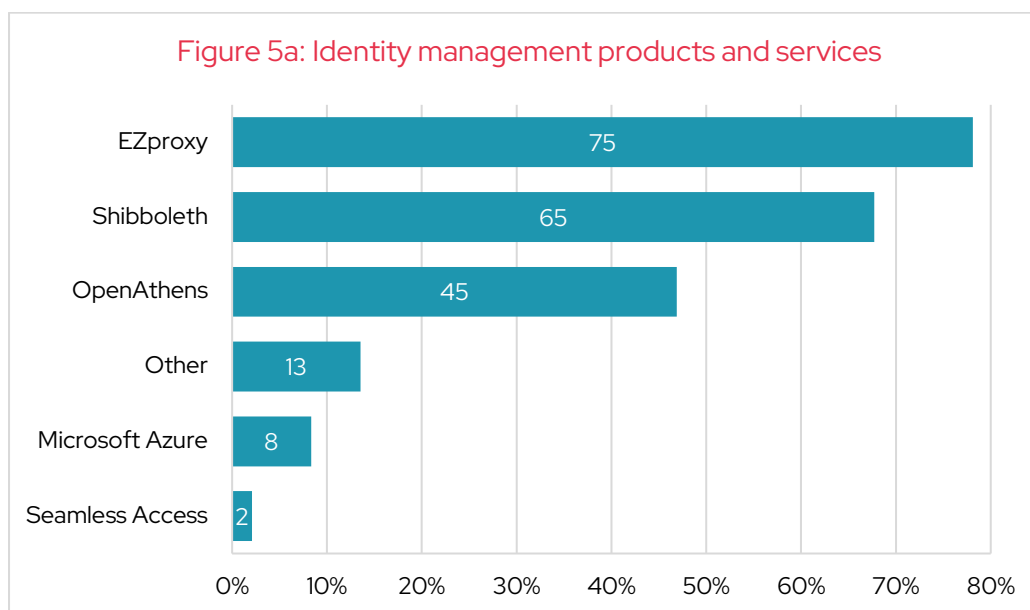
- IP-based, SAML, and federated solutions
- widely used solutions include OpenAthens (from Jisc), Shibboleth and EZproxy (OCLC).

SeamlessAccess is a more recent service that developed from RA21 Initiative.

If your service uses more than one authentication type for different sets of users, please include both.

Regarding value for money, please consult with your IT team if you do not pay for this service.

5.1. Figure 5a displays the identity management systems used across the sector and highlights that EZproxy was the most popular and was used at just over three-quarters of responding institutions, followed by Shibboleth which was in use at around two-thirds of responding institutions, OpenAthens (45 respondents, 47%) and Seamless Access which was used at just two responding institutions (2.1%). Overall, 21 respondents noted that at least one 'other' system was used at their institution, including eight indicating they used Azure, and this is reflected in Figures 5a-e. Details of the 'other' systems used at responding institutions are listed in Table 3 (page 18).



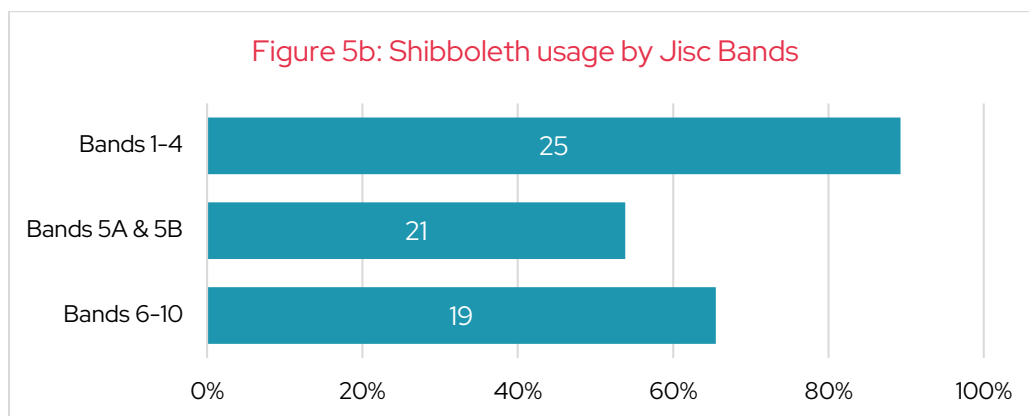
Percentages are based on 96 respondents indicating they used any of the products or services.

**Table 3: Other systems used for identity management**

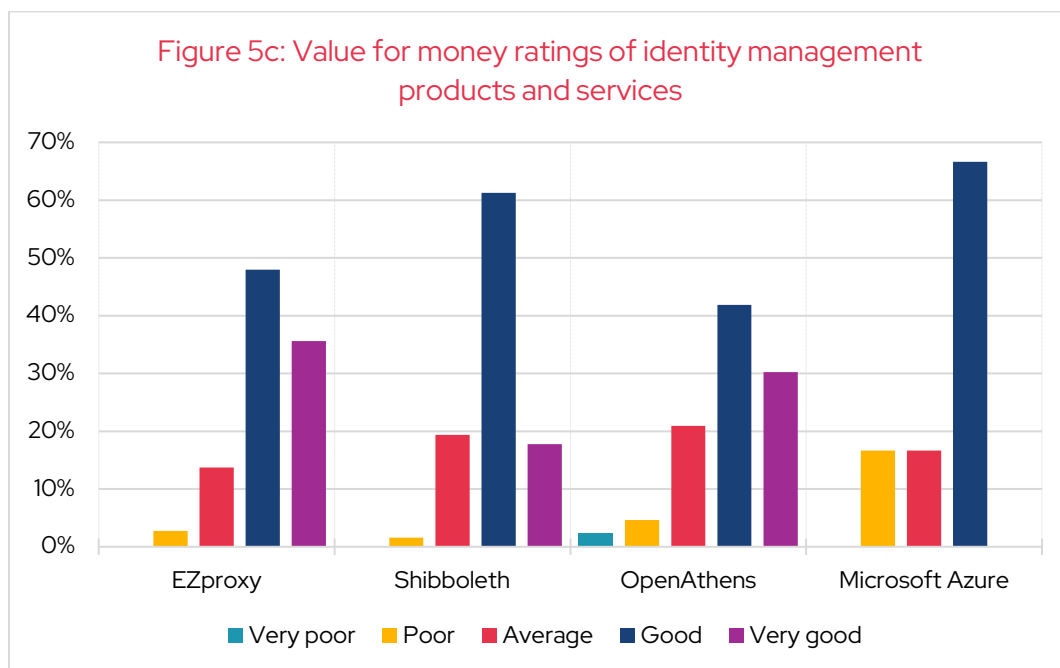
(number of respondents in brackets)

<ul style="list-style-type: none"> <li>• Ex Libris Identity Service (3)</li> <li>• Edugate (2)</li> <li>• In-house (2)</li> <li>• IP/IP based authentication (2)</li> <li>• EZproxy Analytics (1)</li> <li>• PingFederate (1)</li> </ul>	<ul style="list-style-type: none"> <li>• Username/password or domain based registration (1)</li> <li>• Web Access Management (WAM) (1)</li> <li>• WebBridge (1)</li> </ul>
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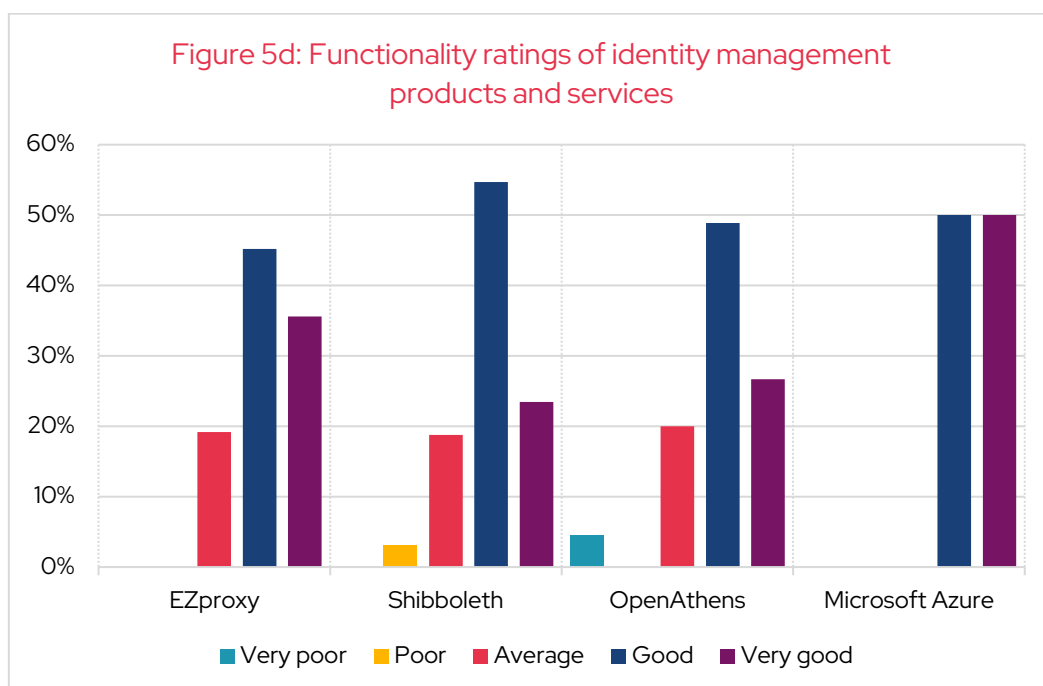
5.2. There were statistically significant differences, with responding institutions in Jisc bands 1-4 more likely to use Shibboleth than those in bands 5A and 5B (Figure 5b).



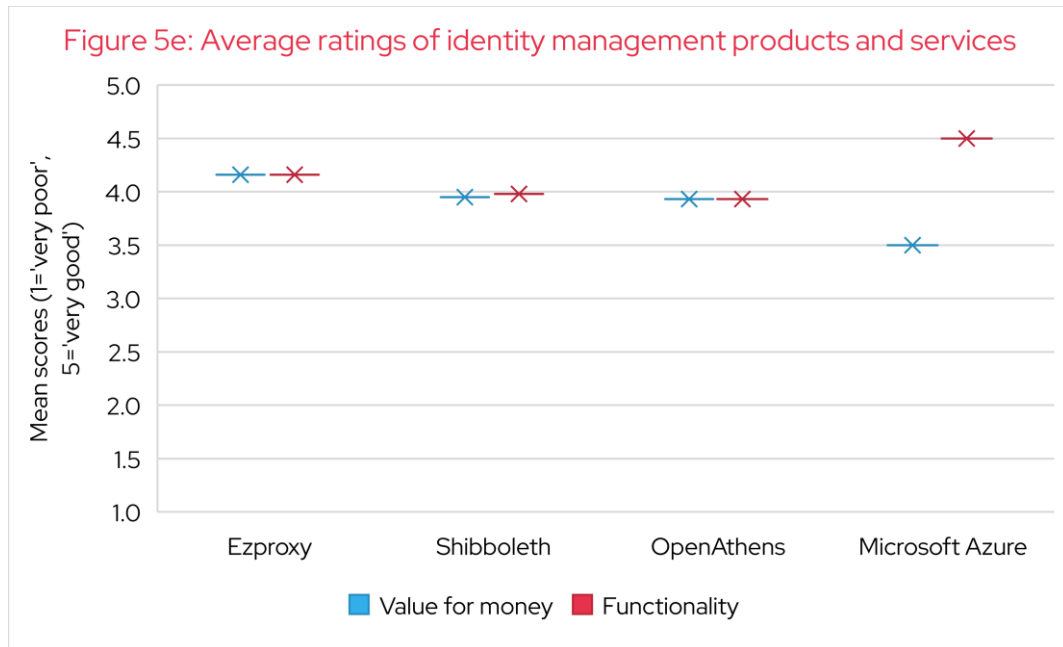
5.3. Respondents were largely satisfied with the value for money of identity management products, although there was some room for improvement. OpenAthens received the only 'very poor' rating of the four solutions (Figure 5c, page 19), however, it received overall ratings of 'good' or 'very good' from 72% of respondents. This compares to four out of the six respondents rating Microsoft Azure considering it to offer 'good' value for money, 79% of respondents using Shibboleth rating it as 'good' or 'very good' and 84% of respondents using EZproxy rating it positively.



5.4. A similar picture emerges when we look at the functionality ratings of the four services, with three-quarters of respondents rating OpenAthens considering it to provide 'good' or 'very good' functionality, compared to 78% of respondents using Shibboleth and 81% of respondents using EZproxy (Figure 5d). Microsoft Azure performed better, with all respondents considering it to provide 'good' or 'very good' functionality. There is some correlation between the ratings, with at least 90% of respondents considering any of EZproxy, OpenAthens or Shibboleth to offer 'good' or 'very good' value for money also rating its functionality positively.



- 5.5. Figure 5e emphasises Microsoft Azure’s improved performance for functionality, and also highlights that there is little difference between the average ratings for the other three identity management products.



- 5.6. Several respondents expressed frustration with the current identity management landscape and the need for more than one product to meet their needs:

*Note that we use multiple systems here. No one mechanism covers all the resources or user groups we need to set up access to, which adds to the complexity and workloads ...*

- 5.7. Additionally, respondents noted that the need to provide access to multiple user groups can be challenging:

*The nuances of licenses allowing access to different user groups isn't as granular in these services. We have so many groups of users allowed access to a different sub-set of resources but we can't always enable this due to restrictions with the authentication services.*

- 5.8. Respondents also voiced concerns with increasing costs and the different pricing models between the available products:

*The cost difference of OpenAthens compared to EZproxy is a stark difference.*

## 6. Journal management

### 6A Journal subscription management

Survey respondents were asked the following:

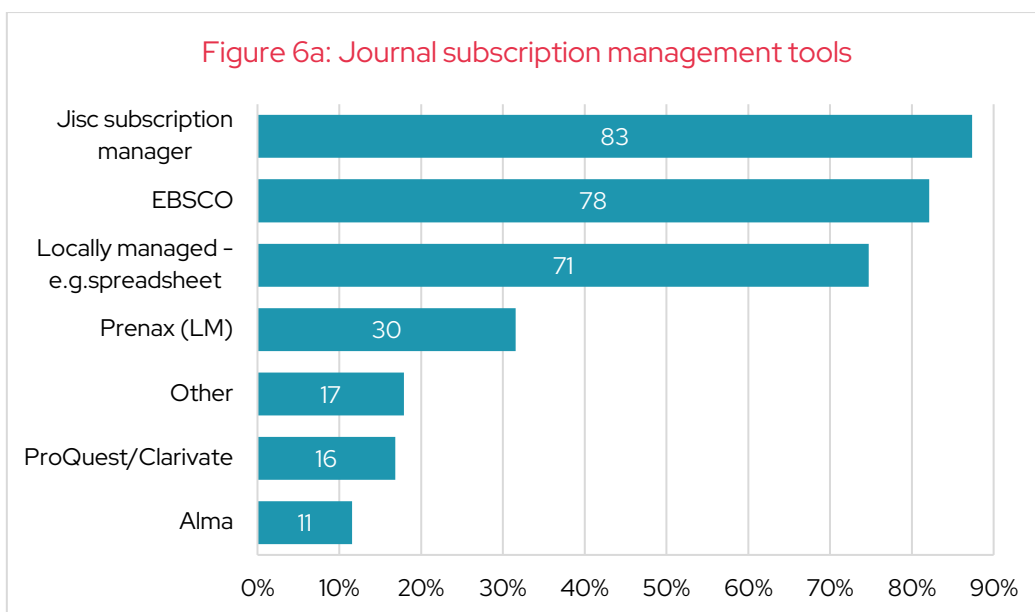
Please note that management of open access is dealt with in subsequent questions.

Please include:

- subscription agent services from EBSCO, LM Prenax, and ProQuest/Clarivate and Jisc License subscriptions manager
- locally managed databases or spreadsheets
- Electronic Resource Management (ERM) solutions that are separate from but may integrate with the library system such as Coral and Folio ERM.

If you are using your library management system to manage subscriptions, please choose the 'other' option and name the system you are using.

6.1. Figure 6a displays the journal subscription management tools used at responding institutions. Jisc subscription manager was the most popular tool and was used at 87% of responding institutions, closely followed by EBSCO (78 respondents, 82%) and around three-quarters of respondents indicating they used a locally managed solution such as spreadsheets. Notably, more than half of respondents (54%) noted that they used Jisc subscription manager and EBSCO, along with a locally managed solution, 36 respondents (38%) noted using two of these three services, while just one respondent (1.1%) indicated they did not use any of these three services.



Percentages are based on the 95 respondents indicating they used any of the products or services.

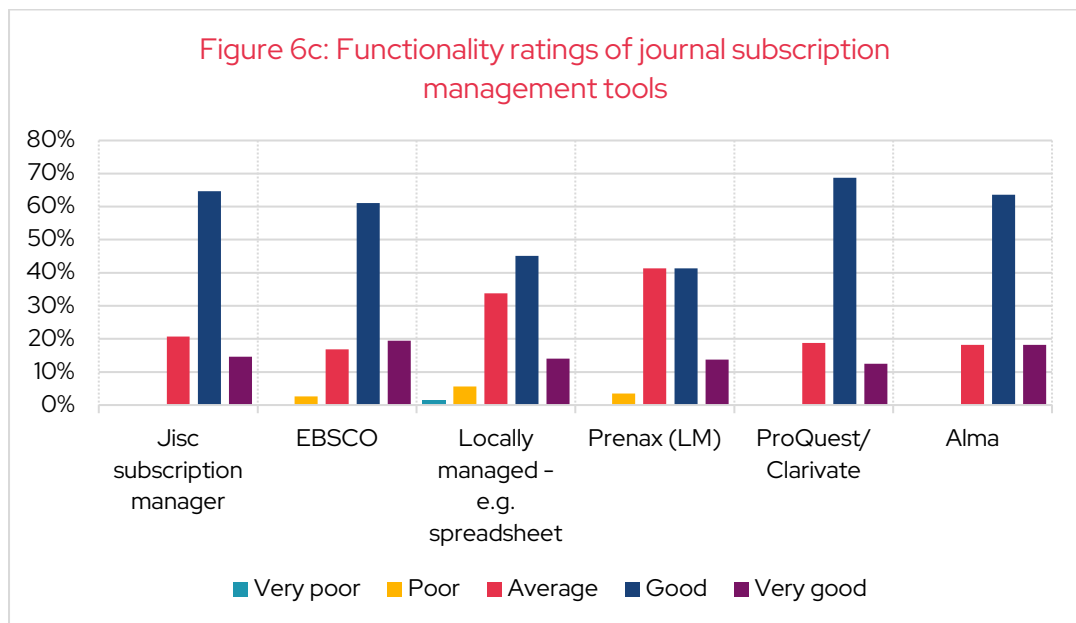
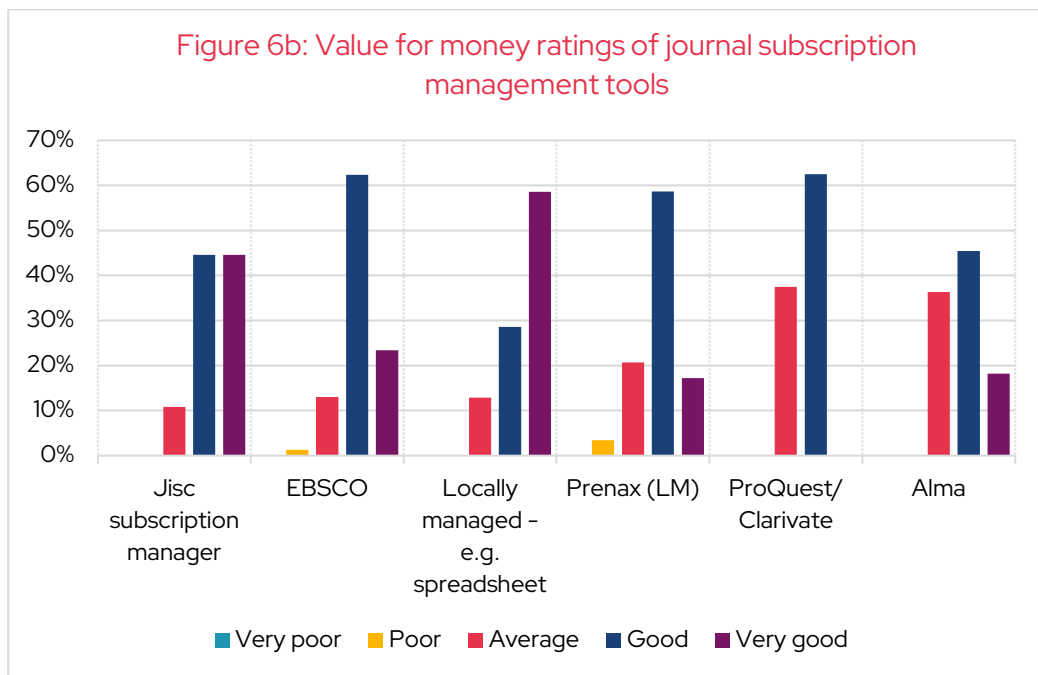


6.2. Overall, 28 respondents indicated they used at least one 'other' solution, including eleven (11.6%) noting they used Alma, and this is reflected in the charts in this section. Details of the 'other' products and services used at responding institutions are listed in Table 4.

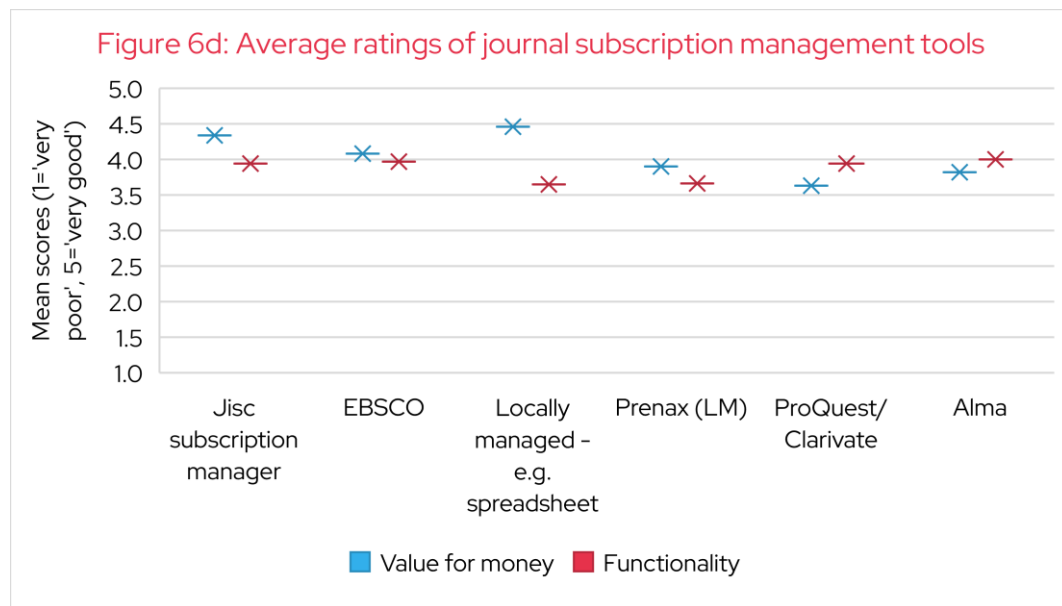
Table 4: Other products and services used for journal subscription management (number of respondents in brackets)	
<ul style="list-style-type: none"> <li>• Content Online (3)</li> <li>• Harrassowitz (2)</li> <li>• JUSP (2)</li> <li>• Sierra LMS (2)</li> <li>• 360 Resource Manager (1)</li> <li>• Alto (ESS) (1)</li> <li>• Consortium Manager for all IReL consortium licences (1)</li> </ul>	<ul style="list-style-type: none"> <li>• East View (1)</li> <li>• ERM spreadsheet (1)</li> <li>• Individual publishers (1)</li> <li>• OCLC Worldshare Licenses functionality as a ERM solution (1)</li> <li>• Serial Solution Client Center (1)</li> <li>• SirsiDynix Symphony (1)</li> <li>• Unsub modelling (1)</li> </ul>

6.3. Figure 6b (page 23) highlights that 59% of respondents rating locally managed tools, such as spreadsheets, considered it to offer 'very good' value for money, perhaps due to the lack of costs associated with most of these resources. Just two respondents considered any of the tools to provide 'poor' value for money (one each for EBSCO and Prenax (LM)), and a high level of satisfaction with a product, with a rating of 'good' or 'very good', ranged from 63% for ProQuest/Clarivate to 89% for Jisc subscription manager.

6.4. Figure 6c (page 23) illustrates that locally managed tools such as spreadsheets do not perform as well for functionality, with two-thirds of those rating this solution as 'good' or 'very good' value for money also considering it to provide above average functionality. In contrast, all ten respondents that considered ProQuest/Clarivate 'good' value for money, also rated its functionality positively. Generally, respondents were satisfied with the functionality of the tools they used, although some resources perform better than others, with the proportion of respondents rating a products functionality as 'good' or 'very good' ranging from 55% for Prenax (LM) to 82% for Alma.



6.5. Figure 6d (page 24) confirms this pattern with a large variance between the average ratings for value for money (4.5) and functionality (3.6) of locally managed tools such as spreadsheets. Figure 6d also highlights that Jisc subscription manager, EBSCO and Prenax (LM) also recorded higher average ratings for value for money than for functionality, although the size of the gap between the two varied. In contrast, ProQuest/Clarivate and Alma both recorded higher average ratings for functionality, although it should be noted that none of the tools achieved an average above 4.0 for functionality.



- 6.6. Respondents noted that multiple tools are required to successfully manage journal subscriptions, with none of the tools currently available providing the necessary functionality:

*We use a combination of services for different resources and for different functions. No one service gives everything we need.*

- 6.7. Additionally, several respondents indicated that, despite using other journal management tools, using their own spreadsheets aids the process:

*Online portals such as EBSCO and Jisc Subs Manager make choosing new subscriptions and renewals a lot easier to manage and functionality has steadily improved over the years. I keep my own spreadsheets as well which are indispensable as they combine the information provided by different products in a format that I can work effectively with.*

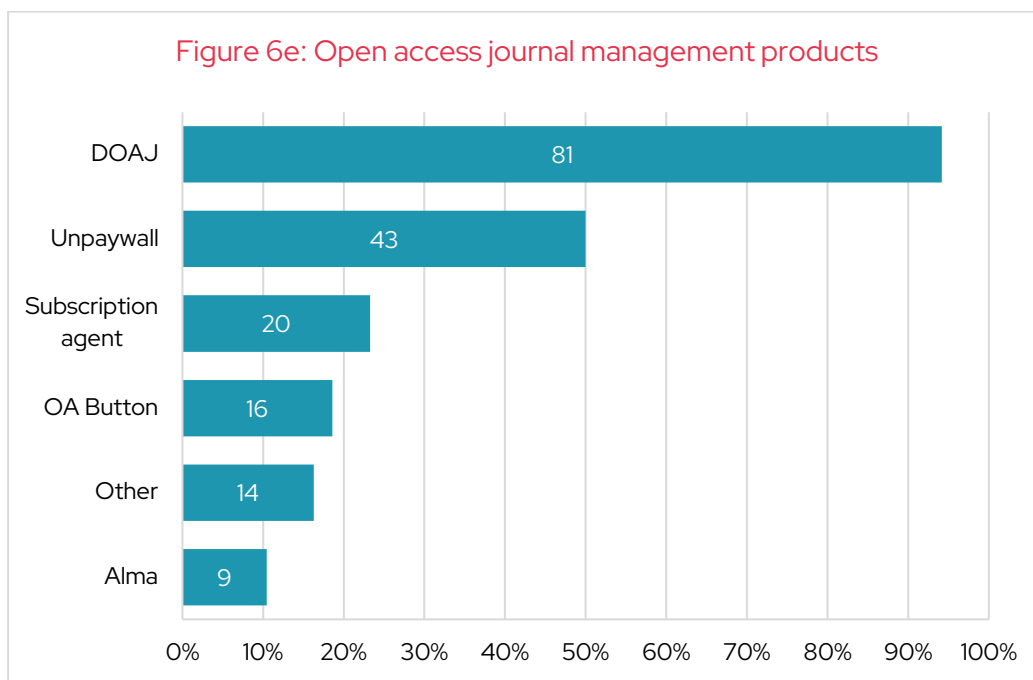
- 6.8. Some respondents noted that reliance on journal subscription management tools has waned over the last few years as institutions move towards Read and Publish deals. However, this sentiment was not echoed by all:

*... The commercial products are essential for managing our packages which are becoming more and more complex, particularly with the Read & Publish agreements. It would be impossible for us to manage our subscriptions without a subscription agent and discovery knowledgebase ...*

## 6B Management of open access journals

Survey respondents were asked the following:

Please include services such as Unpaywall, OA Button, SirsiDynix's CloudSource OA and DOAJ and subscription agents such as EBSCO, Prenax and ProQuest/Clarivate.



Percentages are based on the 86 respondents indicating they used any of the products or services.

6.9. DOAJ was the most popular tool for the management of open access journals (Figure 6e) and was used at more than 90% of responding institutions, followed, some way behind, by Unpaywall which was used at half of responding institutions. Subscription agents were used at 20 responding institutions (23%), while OA Button was used at sixteen responding institutions (19%). No respondents indicated that they used Cloudsource OA, although three respondents did rate it for value for money and/or functionality. Overall, 23 respondents indicated they used at least one 'other' tool, including nine (10.5%) noting they used Alma, and this has been reflected in the charts in this section. Details of the 'other' products and services used at responding institutions are listed in Table 5.

**Table 5: Other products and services used for management of open access journals**

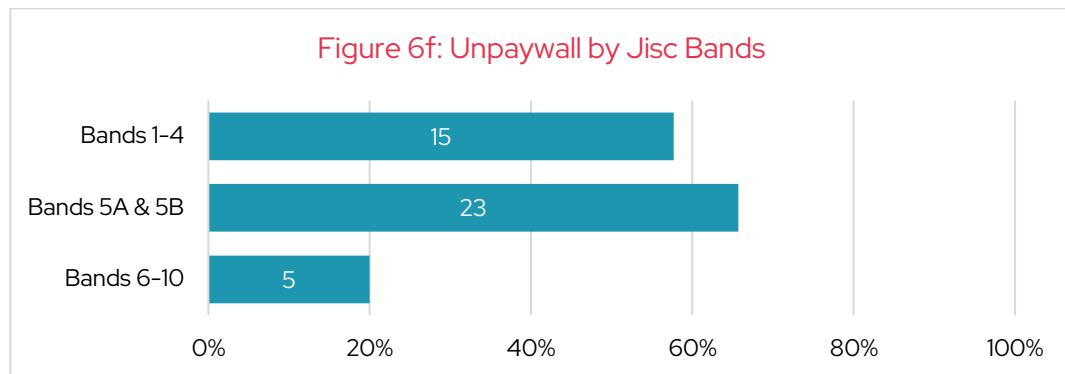
(number of respondents in brackets)

- Sherpa services/Sherpa Romeo (3)
- In-house spreadsheet (1)

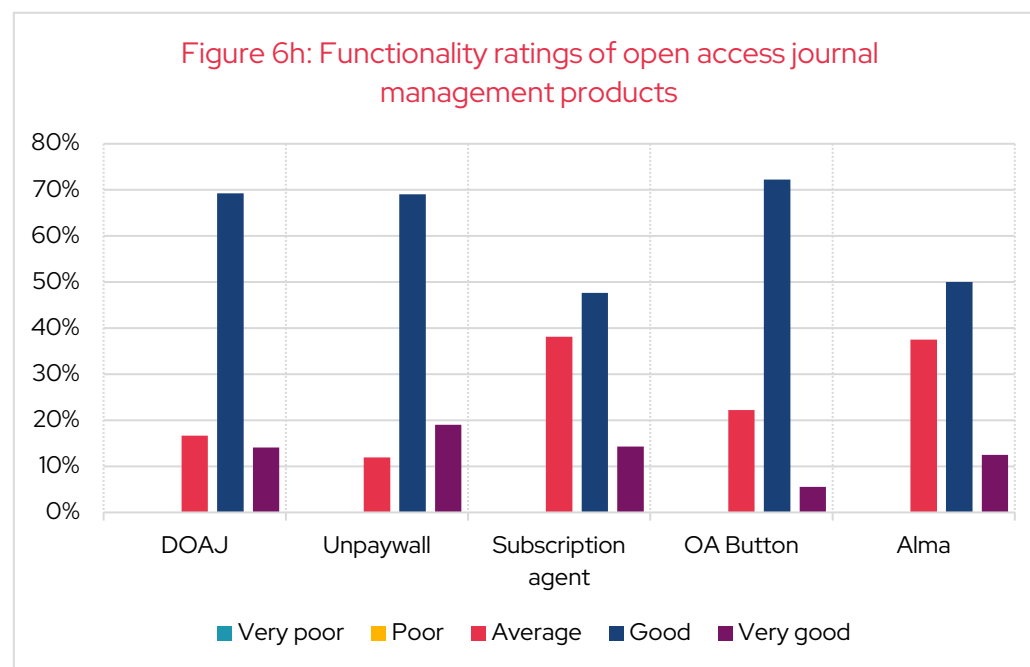
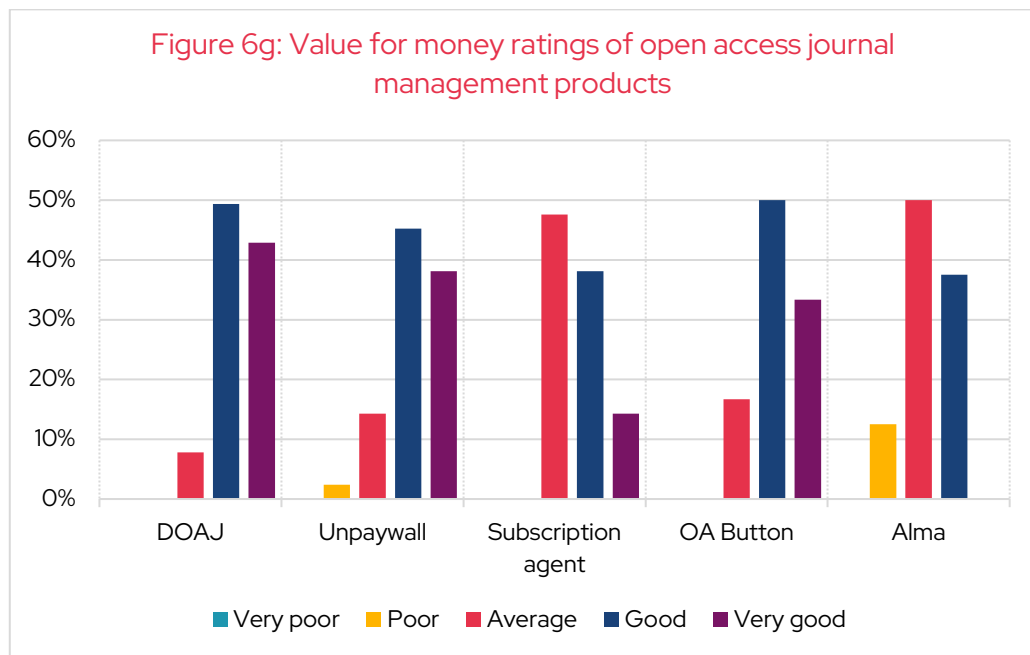
**Table 5: Other products and services used for management of open access journals**  
(number of respondents in brackets)

<ul style="list-style-type: none"> <li>• Primo (2)</li> <li>• WMS Collection Manager/WMS _select in collection manager with DOAJ (2)</li> <li>• ChronosHub Open Access Management system (1)</li> <li>• CORE (1)</li> <li>• DOAB (Directory of Open Access Books) (1)</li> </ul>	<ul style="list-style-type: none"> <li>• JCT (Journal Checker Tool) (1)</li> <li>• Beall's list/Cabells Predatory Reports (1)</li> <li>• JISC Collections (1)</li> <li>• JISC LSM and JISC Chest (1)</li> <li>• LibKey Nomad (1)</li> <li>• Proquest 360Core (1)</li> <li>• SciFree (1)</li> <li>• Unsub (1)</li> </ul>
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6.10. There were statistically significant differences between the Jisc Bands, with responding institutions in bands 1–5 more likely to use Unpaywall (Figure 6f) than those in bands 6–10. While there was insufficient data to test, it is notable that seven out of the nine respondents indicating they used Alma were institutions in bands 6–10.



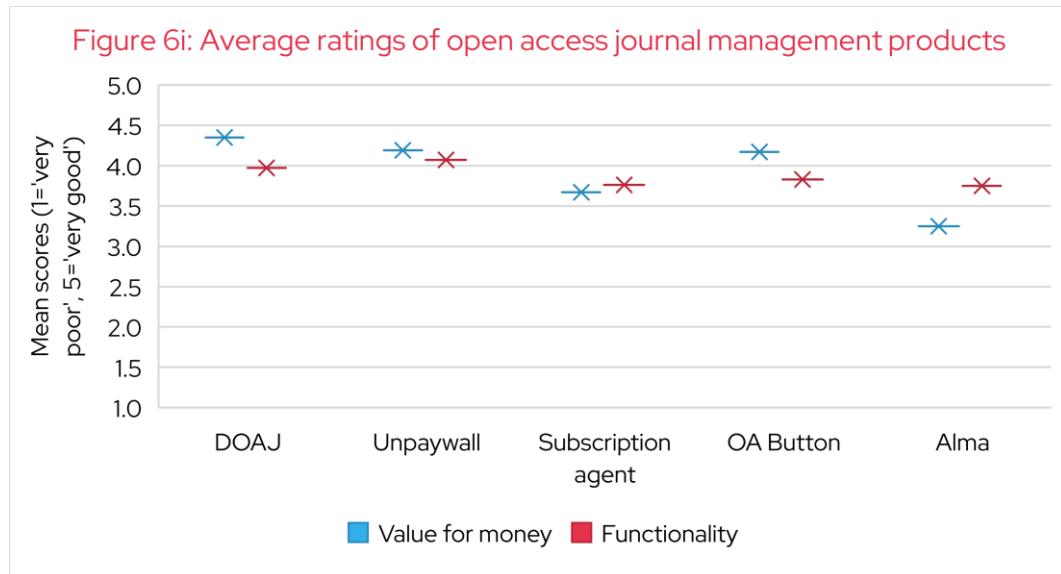
6.11. Figure 6g (page 27) displays the value for money ratings of tools used in the management of open access journals and highlights that both Alma and subscription agents were considered to offer 'average' value for money by around half of respondents rating these systems. In contrast, 92% of respondents rating DOAJ considered it to offer 'good' or 'very good' value for money, compared to 83% of respondents rating OA Button and Unpaywall positively. Cloudsource OA was only rated by three respondents, with two considering it to provide 'poor' value for money, and it has been omitted from Figure 6g.



6.12 Figure 6h highlights that there is some disparity between the value for money and functionality ratings; however, this is possibly owing to the low, or lack of, costs associated with these resources. DOAJ, Unpaywall and OA Button have all been rated as 'good' or 'very good' by more than three-quarters of respondents; however, notably, of the 33 respondents considering DOAJ to provide 'very good' value for money, just nine (27%) rated the functionality as highly, while four (12.1%) rated it as 'average'. Unpaywall follows a similar pattern, with half of respondents considering it to provide 'very good' value for money also rating the functionality as 'very good'. Cloudsource OA was only rated by three respondents, with two

considering it to provide 'average' functionality and it has been omitted from Figure 6h.

6.13 Figure 6i displays the average ratings for value for money and functionality of open access journal management tools and highlights some of the shift from 'very good' value for money to 'good' functionality for DOAJ, OA Button and Unpaywall as highlighted in Figures 6g-h.



6.14 Comments from respondents largely provided further detail on open access processes at individual institutions and how the different tools were used. However, several respondents noted issues with broken links and the need for further development in this area:

*... However, the quality of metadata and link resolver infrastructure often causes linking issues, reducing overall user experience for OA journal content. This is an area for development that would benefit the sector and help push the OA agenda forward ...*

6.15 While others raised concerns with the inclusion of journals that are not open access:

*... Services such as DOAJ can be less than perfect - we often find journals in these repositories that are not 'OA' but would have a moving wall released on content after a period of time. These titles run the risk of confusing people as to what is OA and what isn't, and this is risky as we all work so hard to advocate for proper OA content.*

## 7. Administration of open access

Survey respondents were asked the following:

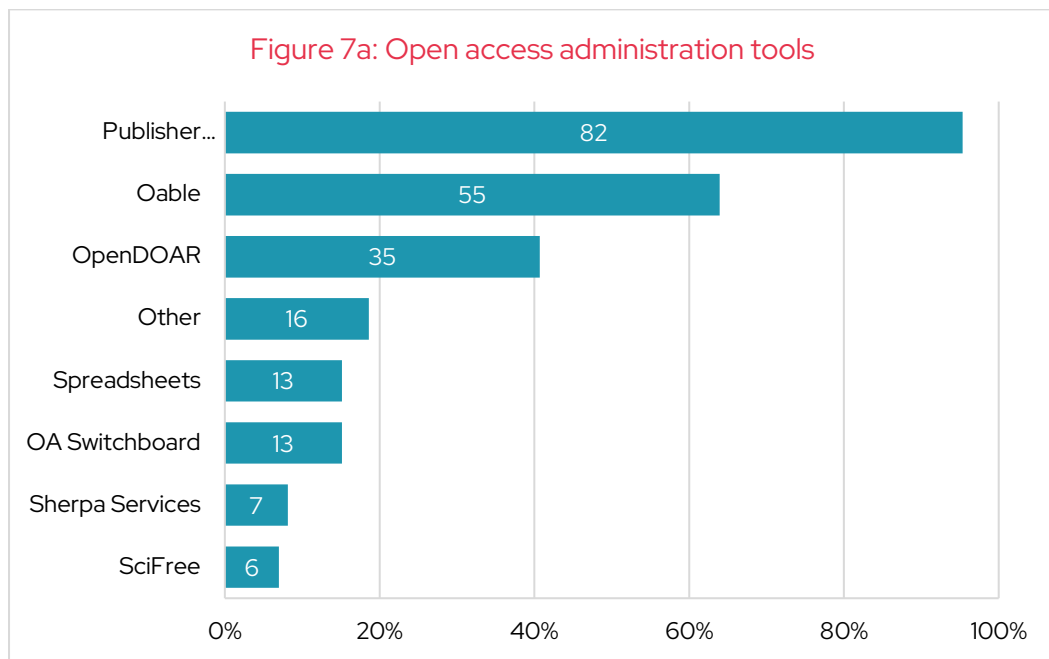
Please include:

- publisher dashboards
- the OA Switchboard which is a community led initiative designed to simplify the sharing of information between stakeholders about open access publications
- (Jisc) Monitor UK which helps higher education institutions (HEIs) review and interrogate national data relating to the publication of open access (OA) outputs
- (Jisc) OpenDOAR which is a global directory of academic open access repositories
- Oable (Knowledge Unlatched) which provides one workflow and one dashboard to manage open access approval, payment (including APCs) and reporting across publishers
- in-house tools and spreadsheets.

Please do not include your CRIS in this answer, this will be dealt with in a later question.

- 7.1. Figure 7a (page 30) displays the range of open access administration tools used across the sector and highlights that publisher dashboards were used at 95% of responding institutions; however, it should be noted that this does not refer to just one resource and, in some instances, institutions will be using several different publisher dashboards. Oable was the most popular individual tool and was used at 55 responding institutions (64%), followed by OpenDOAR (35 respondents, 41%).





Percentages are based on 86 respondents indicating they used any of the products or services.

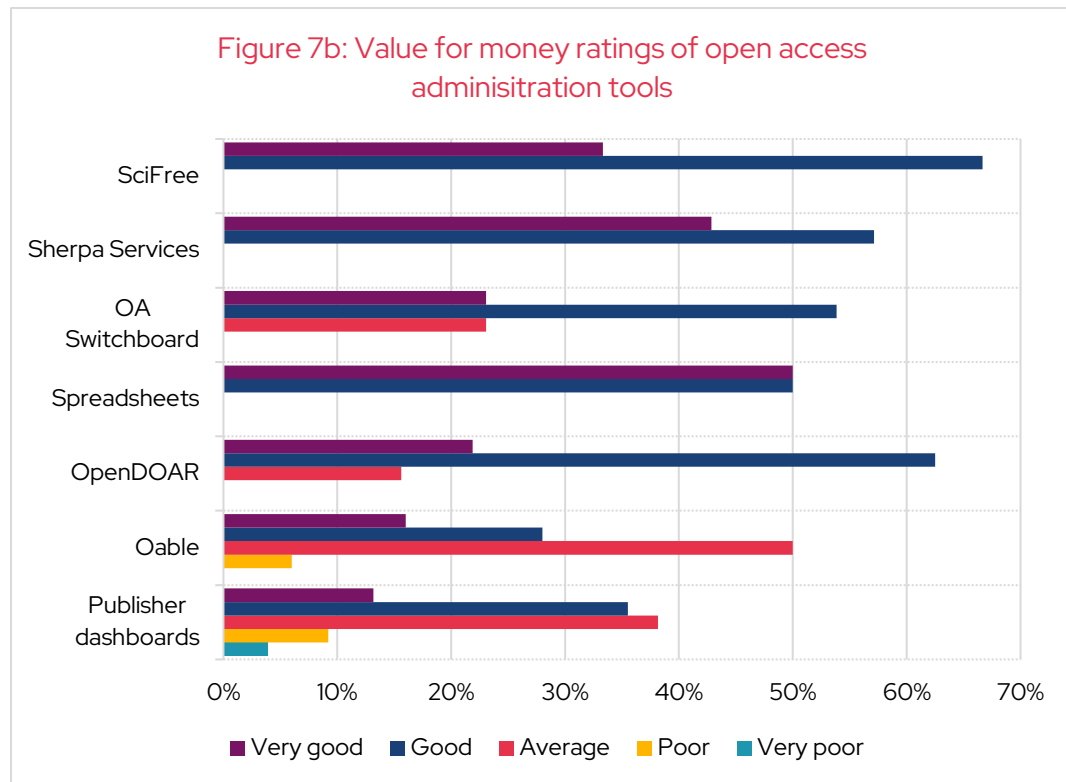
7.2 Overall, 26 respondents reported using at least one 'other' service, with spreadsheets, Sherpa and SciFree all being cited by more than five respondents, and this has been reflected in the charts that follow. Details of the 'other' products and services used at responding institutions are listed in Table 6.

Table 6: Other products and services used for administration of open access  
(number of respondents in brackets)

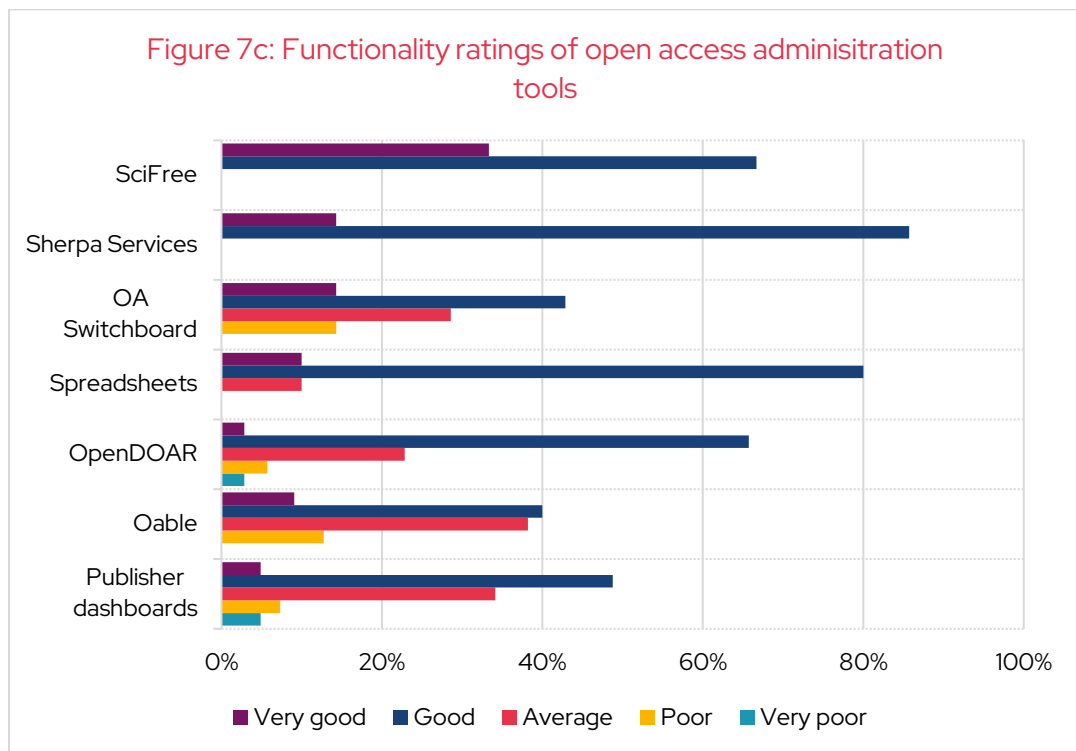
<ul style="list-style-type: none"> <li>• Jisc Publications Router (4)</li> <li>• In-house tools (3)</li> <li>• IRUS (2)</li> <li>• Pure (2)</li> <li>• ChronosHub OA management system (1)</li> <li>• Copyright Clearance Centre (CCC) (1)</li> <li>• CORE (1)</li> <li>• Jisc APC reporting template (1)</li> </ul>	<ul style="list-style-type: none"> <li>• Jisc TA look-up tool &amp; Journal Checker tool (1)</li> <li>• OA monitor developed by OpenAIRE (1)</li> <li>• OpenDOAR (1)</li> <li>• Preprint servers (1)</li> <li>• SciPris (1)</li> <li>• ServiceNow (1)</li> <li>• University Finance system (1)</li> </ul>
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7.3 Figure 7b (page 31) highlights that 20 respondents rating OpenDOAR (63%) considered it to offer 'good' value for money, with a further seven respondents (22%) rating it as 'very good', while, in contrast, half of respondents rating Oable indicated it offered 'average' value for money. Overall, the proportion of

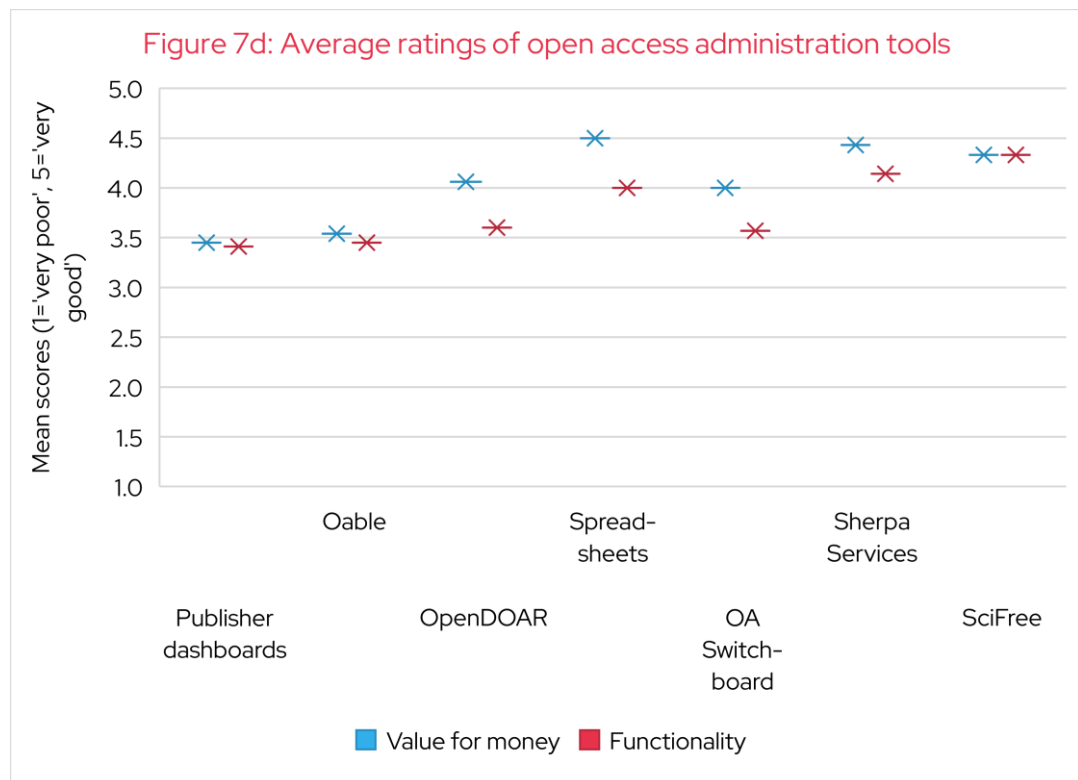
respondents perceiving the services to provide 'good' or 'very good' value for money ranged from 44% for Oable to 100% for spreadsheets, Sherpa and SciFree, although it should be noted that the ratings for the latter three systems are based on fewer respondents.



7.4 Figure 7c (page 32) displays the functionality ratings for open access administration tools and illustrates that, as with the value for money ratings, all respondents rated Sherpa and SciFree as 'good' or 'very good'; however, it should be noted that these were rated by fewer than eight respondents. Elsewhere, the proportion of respondents rating functionality as 'good' or 'very good' ranged from 49% for Oable to 90% for spreadsheets. Notably, of the 29 respondents considering publisher dashboards to provide 'average' value for money, twelve (41%) rated their functionality as 'good'; however, this increase was not consistent and the proportion of respondents rating publisher dashboards as 'good' or 'very good' only increased slightly from 49% for value for money to 54% for functionality. Notably, several respondents commented that they use several publisher dashboards and that the functionality varies between the systems.



7.5 Despite the difference in the proportion of respondents rating the publisher dashboards as 'average' for value for money and functionality, Figure 7d (page 33) highlights that the average rating for both was around 3.4, indicating a moderate level of satisfaction, with Oable and SciFree also recording similar averages for both value for money and functionality. The most notable variations were for OA Switchboard, OpenDOAR, Sherpa and spreadsheets which all recorded higher means for value for money than functionality; however, notably OpenDOAR, Sherpa and most spreadsheets are free services.



- 7.6 Respondents expressed their frustration with the varying formats and functionality of publisher dashboards and called for a standardised system to be adopted by publishers:

*More standardised publisher dashboards would be useful.*

- 7.7 Respondents were also frustrated with the need to use several different systems to obtain the information required and called for the processes to be streamlined or consolidated:

*Would like to see everything in one place, ideally integration with LMS or repository, without managing separate dashboards with different process and different contacts for each publisher. Maybe Jisc should do this through Subscription Manager.*

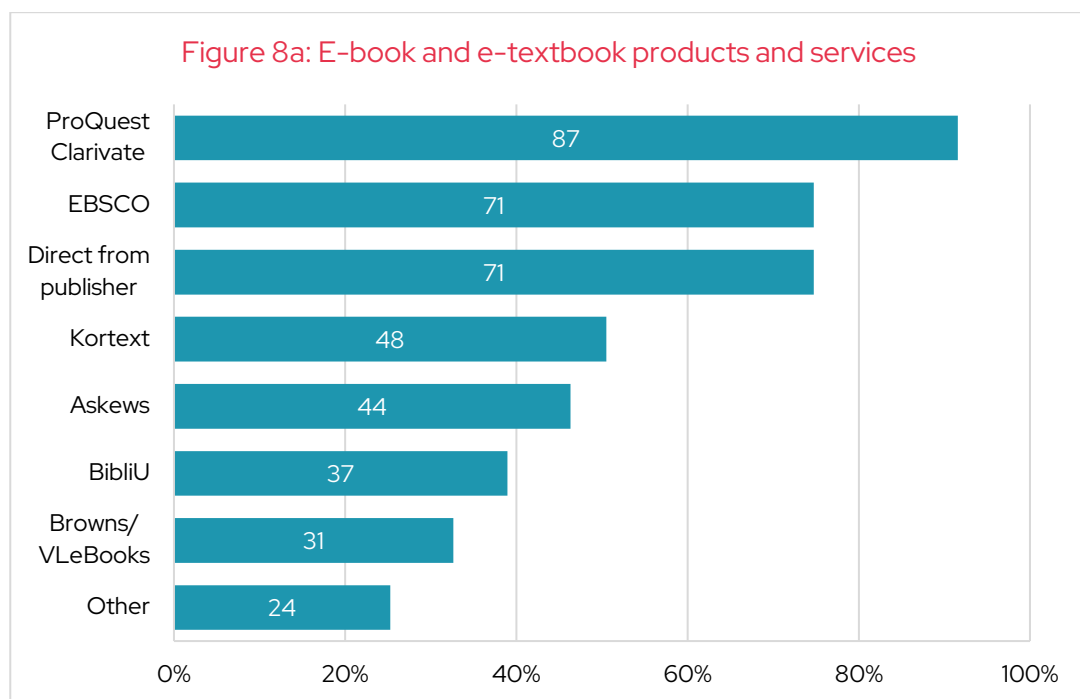
## 8. E-book or e-textbook management

Survey respondents were asked the following:

Please include ebook/etextbook platforms/aggregators including Kortext, BibliU, Perlego, ProQuest/Clarivate, EBSCO, Askews, VitalSource etc. as well as individual ebook platforms from publishers (e.g. OUP, Sage, Wiley etc.).

If you have selected direct from the publisher (if you don't use an aggregator), please enter the name of the publisher in the textbox underneath.

- 8.1 Figure 8a highlights that ProQuest/Clarivate was the most popular system for the management of ebooks and etextbooks and was used at 92% of responding institutions, followed by EBSCO and obtaining titles direct from the publisher which were each used at three-quarters of responding institutions. It should be noted, however, that direct from the publisher ratings are likely to cover more than one publisher.
- 8.2 Overall, 47 respondents (49%) noted using at least one 'other' system, with 31 respondents (33%) indicating they used Browns/VLeBooks and this will be represented in the charts that follow. Notably, there was some confusion between Browns/VLeBooks and Askews, and it was not always clear which system respondents were referring too, and, while they have been reported separately, there is likely to be some crossover.



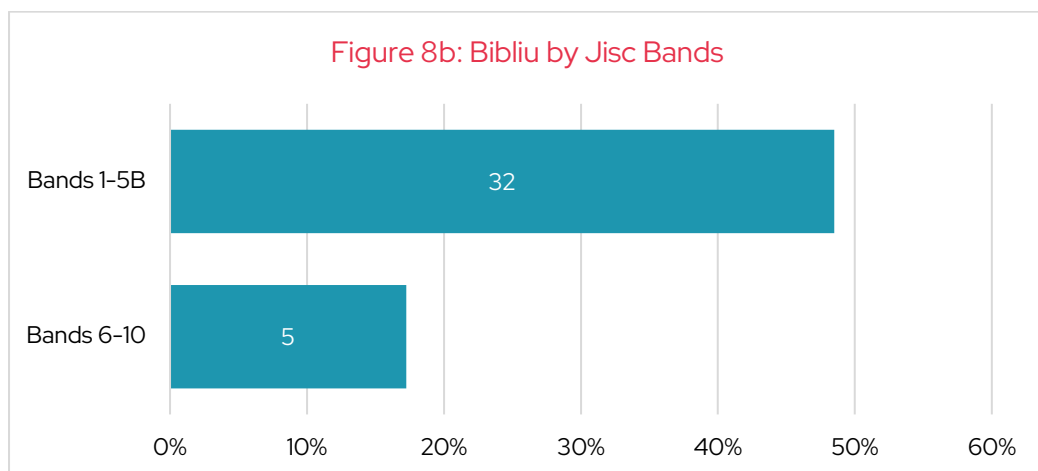
Percentages are based on 95 respondents indicating they used any of the products or services.

8.3 Details of the other products and services used at responding institutions are listed in Table 7.

<p>Table 7: Other products and services used for e-book and e-textbook management (number of respondents in brackets)</p>	
<ul style="list-style-type: none"> <li>• Overdrive (5)</li> <li>• JSTOR EBA/JSTOR EBA (4)</li> <li>• Perlego (3)</li> <li>• Project MUSE (2)</li> <li>• Abebooks/Amazon (1)</li> <li>• Content Online (1)</li> <li>• De Gruyter ebooks (1)</li> <li>• Macmillan (1)</li> <li>• McGraw-Hill (1)</li> <li>• Open Access ebook collection platforms (1)</li> </ul>	<ul style="list-style-type: none"> <li>• O'Reilly (1)</li> <li>• OUP (1)</li> <li>• Pearson (1)</li> <li>• Rialto (1)</li> <li>• Sage Catalyst (1)</li> <li>• Springer (1)</li> <li>• Taylor and Francis (1)</li> <li>• VitalSource (1)</li> </ul>

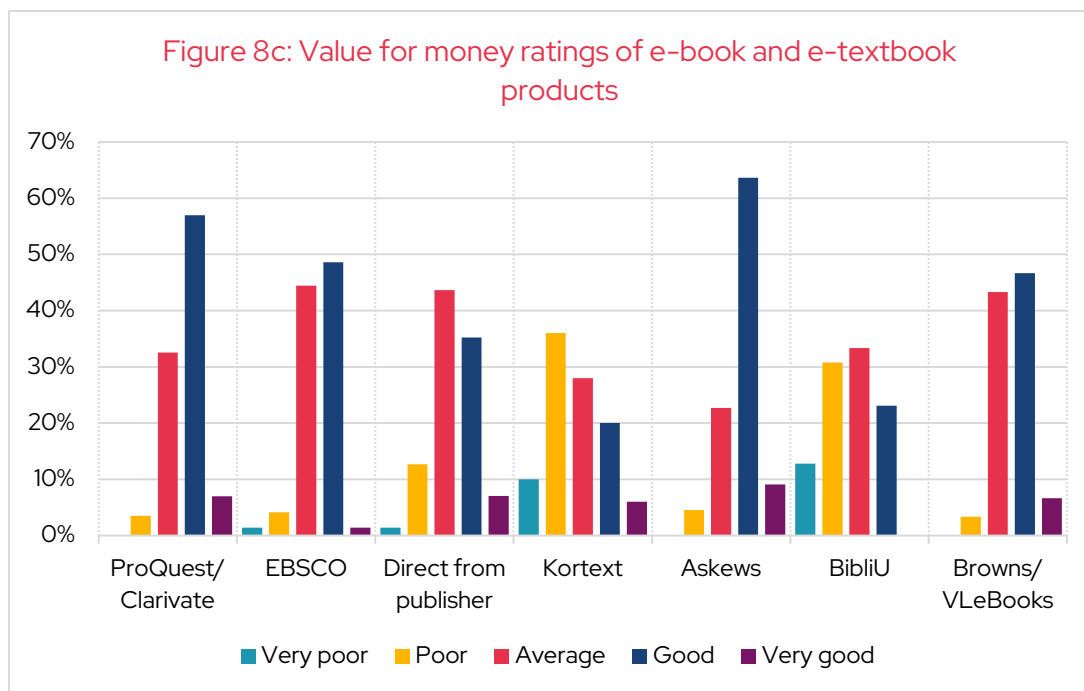
8.4 Of note, 92 respondents (97%) reported using more than one system, with three (3.2%) indicating they used eight different tools for e-book and e-textbook management.

8.5 Figure 8b highlights that there are statistically significant differences between the Jisc Bands, with responding institutions in bands 1-5 more likely to use BibliU than those in bands 6-10.

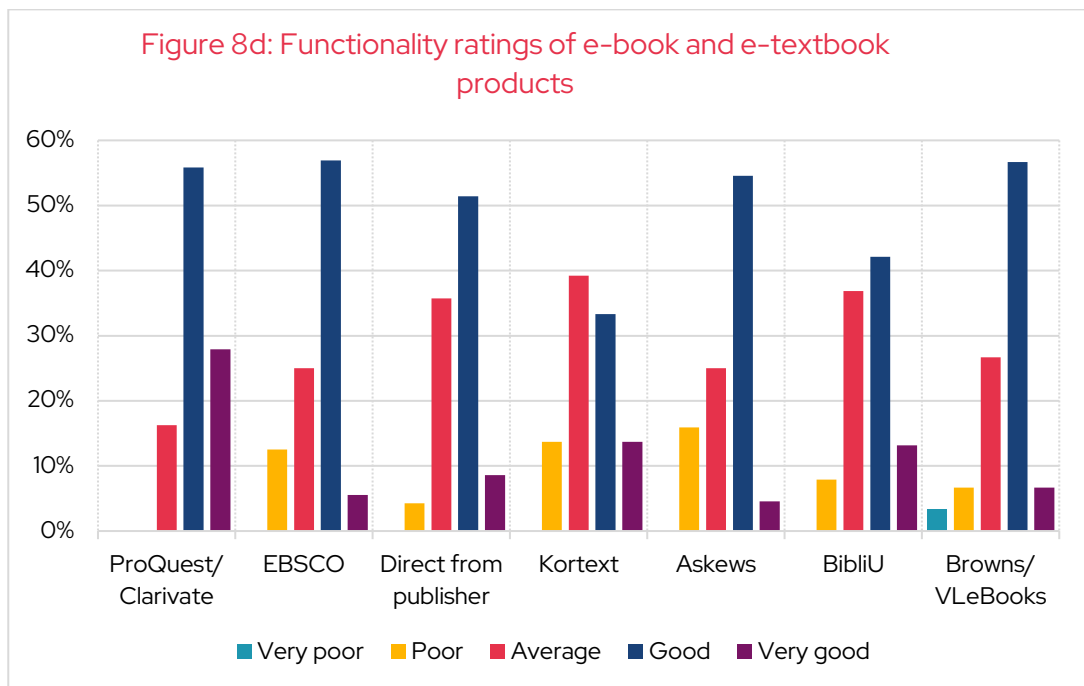


8.6 Figure 8c (page 36) compares the value for money ratings of e-book and e-textbook management tools and highlights that Askews achieved the highest level

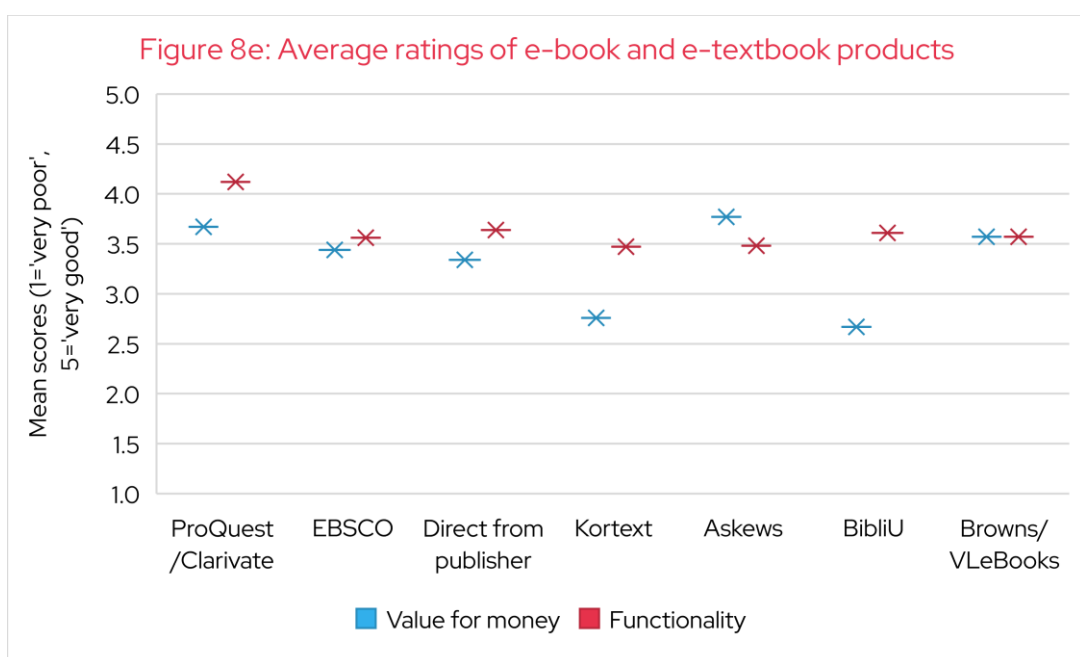
of satisfaction with 73% of respondents considering the service to provide 'good' or 'very good' value for money. In contrast, both Kortext and BibliU were perceived as offering above average value for money by around one-quarter of respondents rating their services.



8.7 Figure 8d (page 37) displays the functionality ratings for e-book and e-textbook management tools and illustrates that the systems largely achieve higher satisfaction levels for functionality than for value for money, with the proportion of respondents rating the functionality as 'good' or 'very good' ranging from 47% for Kortext to 84% for ProQuest/Clarivate. This is perhaps not surprising given the current climate of escalating costs of e-book packages and the growing dissatisfaction amongst the sector. However, the one exception is Askews with 59% of respondents rating its functionality as 'good' or 'very good' compared to 73% of respondents rating value for money at the same level.



8.8 This is highlighted further by Figure 8e which displays the average ratings for value for money and functionality and illustrates that all systems, apart from Askews and Browns, rated higher for functionality, on average. BibliU saw the largest difference with an average rating of 2.7 for value for money, indicating a below average level of satisfaction, compared to 3.6 for functionality. Despite the difference between the satisfaction levels for value for money and functionality, it is notable that only ProQuest/Clarivate achieved an average rating above 4.0 for functionality, indicating that respondents generally rated the system positively.





- 8.9 Respondents raised concerns about the increasing costs of ebooks as well as the prohibitive and unsustainable pricing models for etextbooks:

*... We are not able to make etextbooks available even though they contain content that would be highly valuable to our students. This is due to the access models on offer (subscription not purchase, costed per student (even if then wider access is given), bundled into platform packages and so on) and the prohibitive pricing. This approach means we are unable to afford these resources and this disadvantages our students. In addition this situation creates a two tier system between universities that can afford etextbooks and those who cannot. Finally it is likely in the current financial climate that more and more will be unable to afford this. This is not a model that is fit to support educational needs ...*

- 8.10 Additionally, some respondents expressed frustration with the changing content of e-book packages and the removal of titles with little or no notice:

*... Expiring licenses are particularly problematic, not just because of having to pay repeatedly, but because content can be removed from platforms meaning you lose access entirely, often without warning ...*

- 8.11 Frustration was also expressed with the differences between, and the complexity of, e-book licences, and some respondents called for the process to be streamlined:

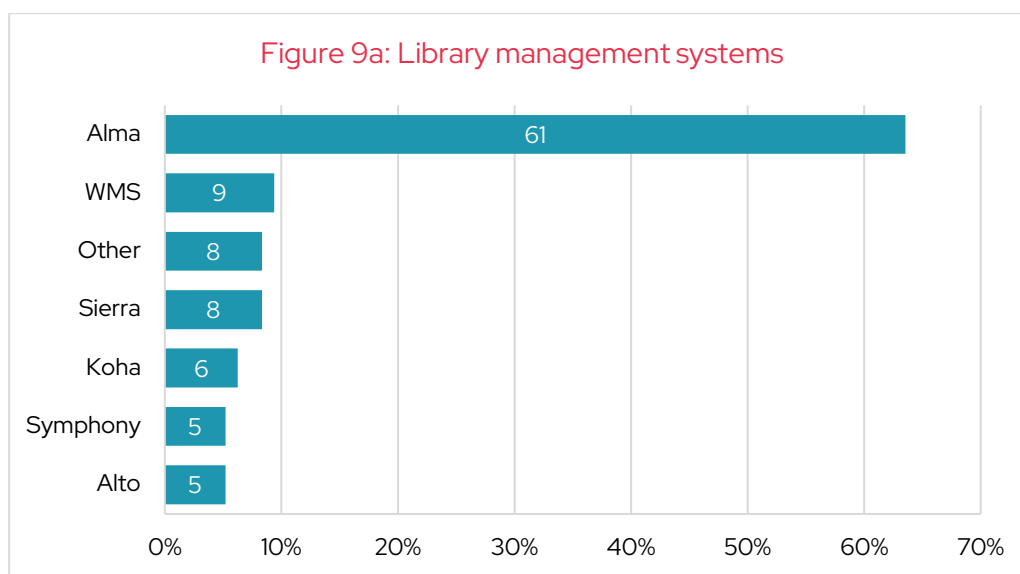
*Where ebooks are concerned there is still a proliferation of different licenses which can be confusing and frustrating, it would be welcome if things could be more straightforward ...*

## 9. Library management systems

Survey respondents were asked the following:

Please include conventional library management systems such as Alto (ESS), Koha (open source), Symphony (SirsiDynix), and Sierra (Innovative Interfaces), and library services platforms such as Alma (Ex Libris/Clarivate) and WMS (OCLC).

If you have indicated an open source provider, please give details of whether it is supported or self-managed in the textbox below.



Percentages are based on 96 respondents indicating they used any of the products or services.

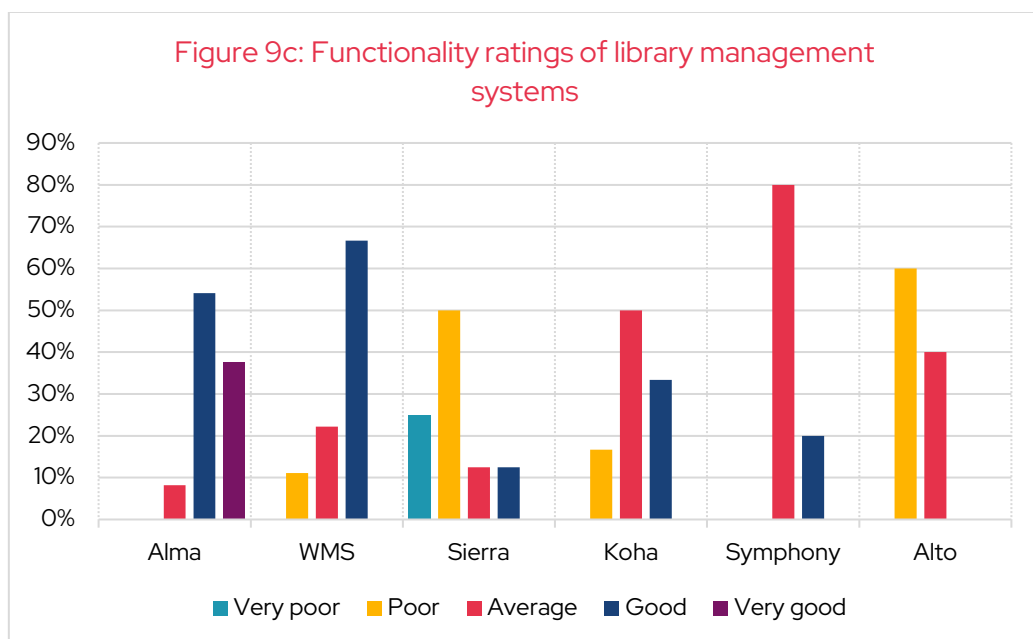
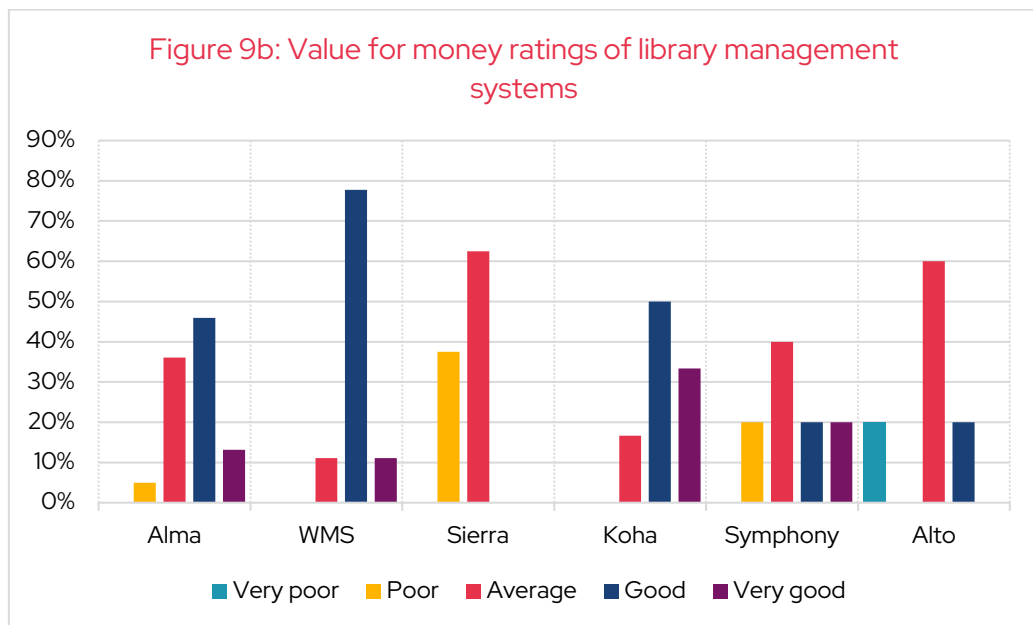
9.1. Figure 9a highlights the dominance of Alma, and it was the library management system at 61 responding institutions (64%), followed by WMS, although this was some way behind and was used at nine responding institutions (9.4%). Sierra was the library management system at eight responding institutions (8.3%), Koha was used at six responding institutions (6.3%), and Symphony and Alto were each used at five responding institutions (5.2%). Overall, eight respondents noted that they used an 'other' library management system and these are listed in Table 8.

**Table 8: Other library management systems**

(number of respondents in brackets)

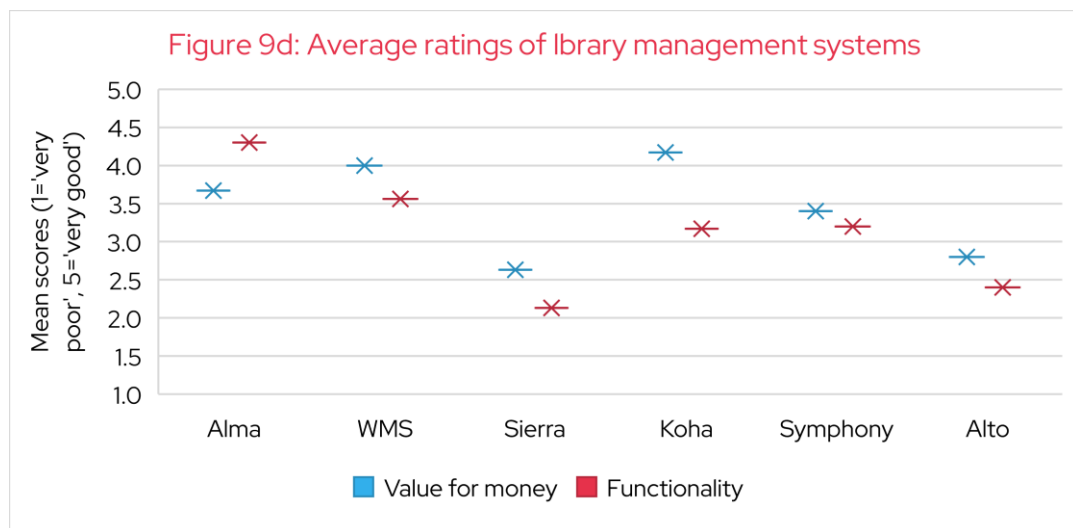
- |   |   |
|---|---|
| <ul style="list-style-type: none"> <li>• Soprano (3)</li> <li>• Liberty from Softlinks (2)</li> <li>• Blue Cloud Central (1)</li> </ul> | <ul style="list-style-type: none"> <li>• FolioJisc Hub (1)</li> <li>• Horizon SirsiDynix (1)</li> <li>• Sierra (1)</li> </ul> |
|---|---|

9.2. Despite being the most popular library management system, just over one-third of respondents rating the system considered Alma to offer 'average' value for money, whilst three respondents (4.9%) rated it as 'poor' (*Figure 9b*). Figure 9b also illustrates that there was a higher level of satisfaction for WMS, with 89% of respondents considering it to offer 'good' or 'very good' value for money. In contrast, none of the eight respondents indicating they used Sierra rated it positively; however, it should be noted that, apart from Alma, the ratings for the library management systems are based on fewer than ten respondents.



9.3. Figure 9c (page 40) illustrates that Alma is one of only two systems to perform better for functionality, with 92% of respondents using the system rating its functionality positively. Sierra also performed slightly better with one respondent rating its functionality as above average. In contrast, WMS, Koha and Symphony all record lower satisfaction levels for functionality than for value for money, with none of the five respondents using Alto rating its functionality above average.

9.4. This is highlighted further by Figure 9d, which illustrates that Alma was the only library management system to achieve a higher average rating for functionality (4.3) than for value for money (3.7), and it was the only system to have an average rating above 4.0 for functionality, indicating that respondents generally rated the system positively. Sierra rated lowest, on average, for both value for money (2.6) and functionality (2.1), while Koha (4.2) and WMS (4.0) both achieved higher average ratings for value for money, although they are based on fewer respondents.



9.5. Respondents are largely concerned with the lack of competition and the dominance of Alma in the library management systems market:

*Whilst there are benefits from similar institutions using the same platforms, conversely I think we may get better service from our vendor if there was more genuine competition in this market space ...*

9.6. It was also noted that the lack of competition may be contributing to higher prices:

*Reduced competition in market – really only two or three viable options which is reflected in price.*

- 9.7. Some respondents expressed frustration with the slow timescales for developments, with several noting that library management systems are focussed on the US market, and this is reflected in any developments:

*... because the critical mass of libraries is in the US, they tend to be more responsive to the US market than the UK market, which does mean that the development of features which are important to UK libraries can take longer to implement ...*

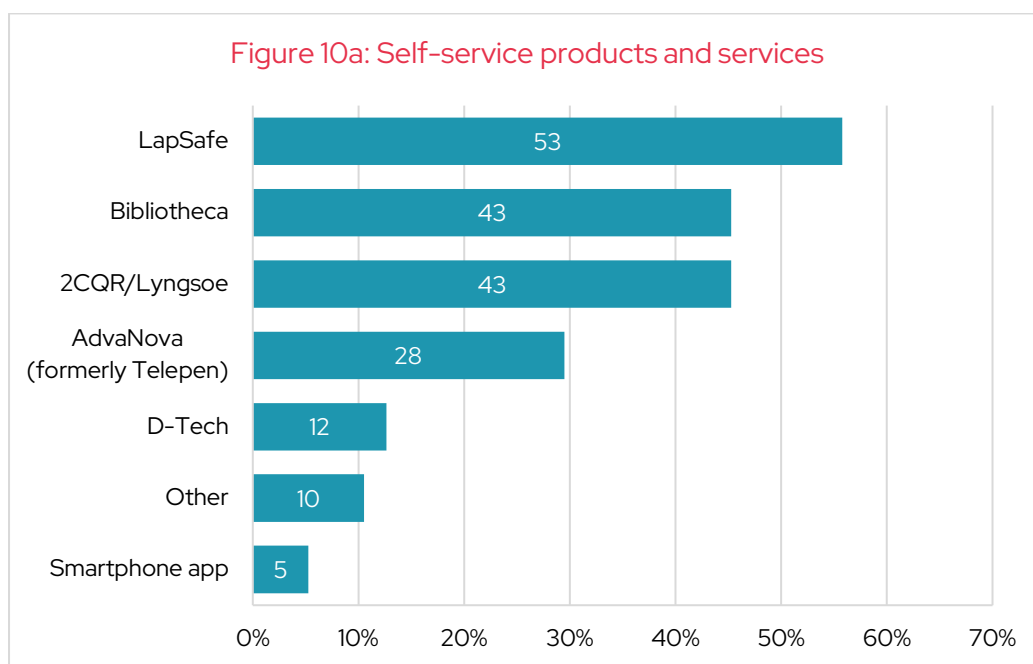
## 10. Library space and service management

### 10A Self-service

Survey respondents were asked the following:

Please include (typically RFID based) 'kiosks', smartphone (app) based solutions and products to enable unstaffed libraries, as well as self-service laptop loan solutions such as LapSafe.

10.1 Figure 10a illustrates that LapSafe was a self-service system at more than half of responding institutions (53 respondents, 56%), while Bibliotheca and 2CQR/Lyngsoe were each used at 43 responding institutions (45%). Overall, ten respondents indicated they used at least one 'other' service and these are listed in Table 9.



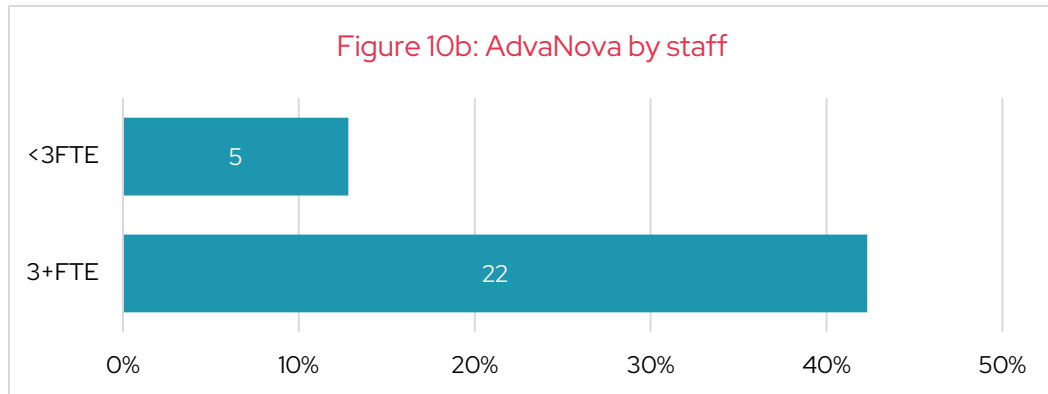
Percentages are based on 95 respondents indicating they used any of the products or services.

**Table 9: Other self-service systems**

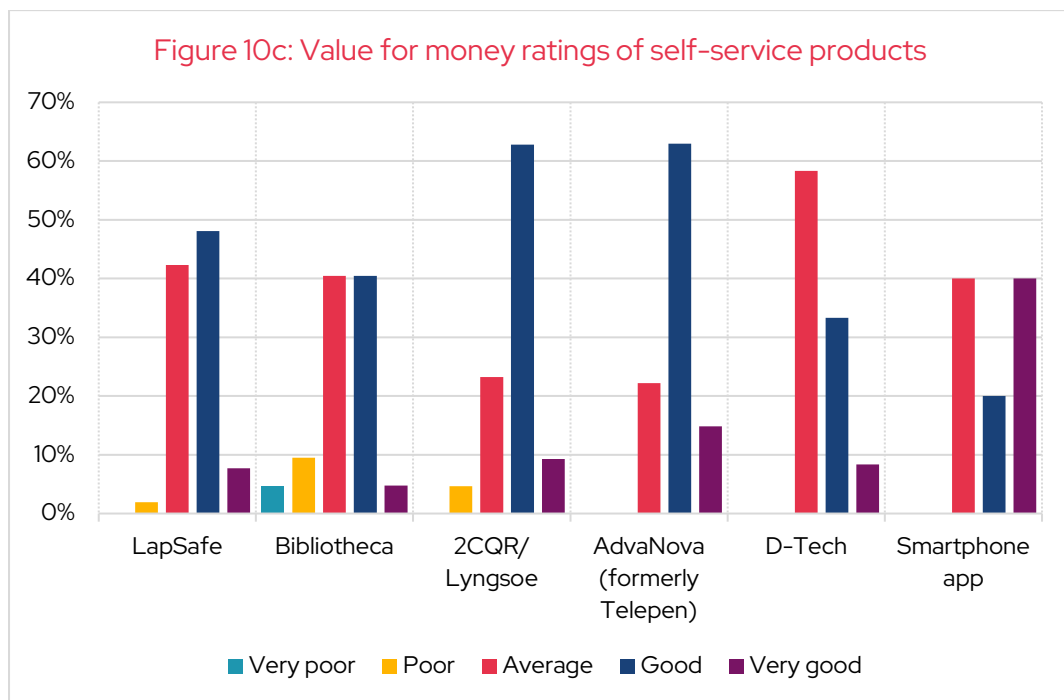
(number of respondents in brackets)

- |  |  |
|--|--|
| <ul style="list-style-type: none"> <li>• Myritrac (3)</li> <li>• Chargebox (1)</li> <li>• FE Technologies (1)</li> <li>• Lyngsoe Book-o-mat (1)</li> <li>• NexBib (1)</li> </ul> | <ul style="list-style-type: none"> <li>• Papercut (1)</li> <li>• PSP Asset Protection (1)</li> <li>• Selfcheck by 3M (now Bibliotheca) (1)</li> <li>• Traka (1)</li> </ul> |
|--|--|

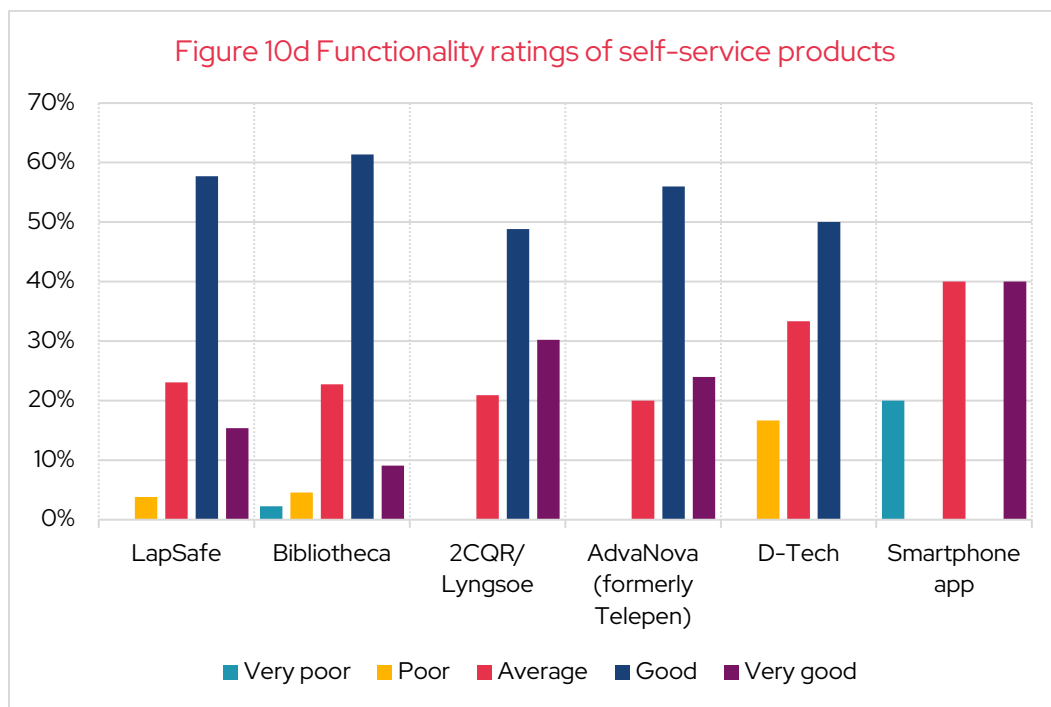
10.2 There were statistically significant differences, with responding institutions with three or more FTE staff devoted to the support of library technology more likely to use AdvaNova than responding institutions with fewer than three staff FTE (Figure 10b).



10.3 Figure 10c compares the value for money ratings of the different self-service systems and highlights that more than 60% of respondents considered 2CQR/Lyngsoe and AdvaNova to provide 'good' value for money. In contrast, D-Tech was considered to provide 'average' value for money by almost 60% of respondents. As a result, the proportion of respondents rating the services positively ranged from 42% for D-Tech to 78% for AdvaNova. Bibliotheca was the only system to be considered as providing 'very poor' value for money (two respondents, 4.8%), with a further four respondents (9.5%) rating it as 'poor'.

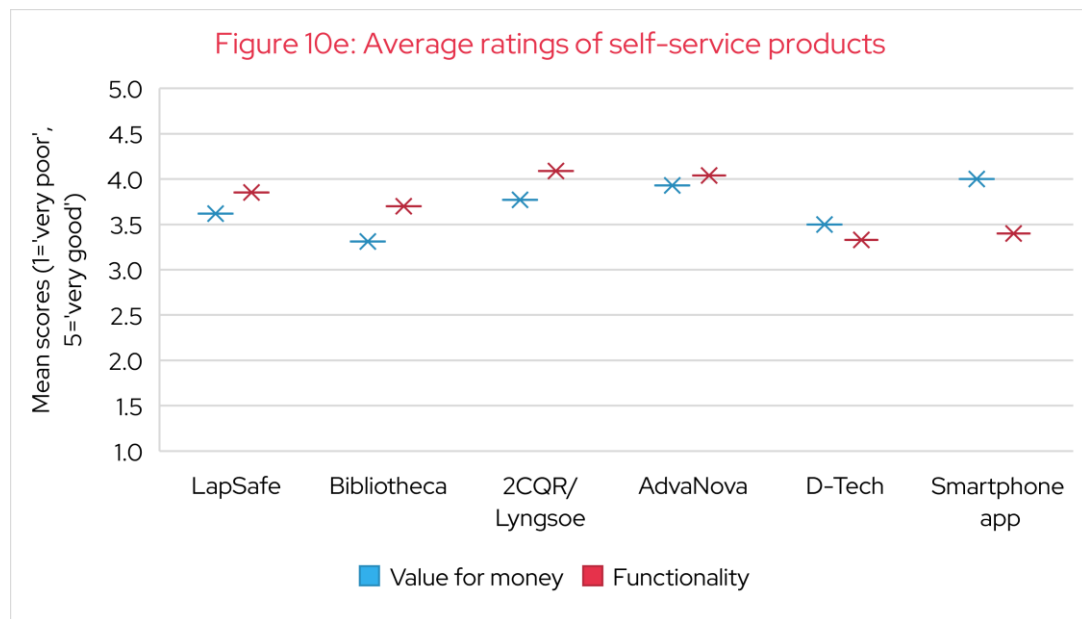


10.4 The distribution of value for money and functionality ratings was similar for LapSafe (Figure 10d), although there were some differences between the individual responses; however, of the 29 respondents rating its value for money as 'good' or 'very good', 27 (93%) also rated its functionality positively. Bibliotheca performed better for functionality, with 70% of respondents rating it as 'good' or 'very good', compared to 45% of respondents considering it to provide above average value for money. Overall, the proportion of respondents positively rating the functionality of the services ranged from 40% for smartphone apps to 80% for AdvaNova.



10.5 Figure 10e (page 46) displays the average ratings for value for money and functionality of self-service systems, and highlights that none of the systems averaged more than 4.0, corresponding to a 'good' rating, for value for money. Smartphone apps did achieve an average rating of 4.0, however, it should be noted that it is based on just five respondents and it is unlikely to correspond to just one app. Figure 10e also illustrates that 2CQR/Lyngsoe, AdvaNova, Bibliotheca and LapSafe all achieved higher ratings for functionality, on average, whilst D-Tech and Smartphone apps performed better for value for money.





- 10.6 Respondents expressed concern with the lack of competition in the market, for both RFID and laptop loans:

*RFID equipment provision is a small marketplace and consequently supplier choice is limited. There also does not seem to be any appetite within the RFID industry to enter the library marketplace so this is not likely to change in the near future.*

*... LapSafe's workflow model of requiring users to plug the laptop into the USB point on return is unsatisfactory, but as they have the laptop loan market to themselves there is no alternative.*

- 10.7 Several respondents also noted that maintenance costs are expensive:

*Cost of installation and maintenance makes it difficult to make changes to equipment ...*

- 10.8 While others indicated they were considering a move towards the use of mobile devices in this area, but some considered the systems currently available to not be of a high enough standard:

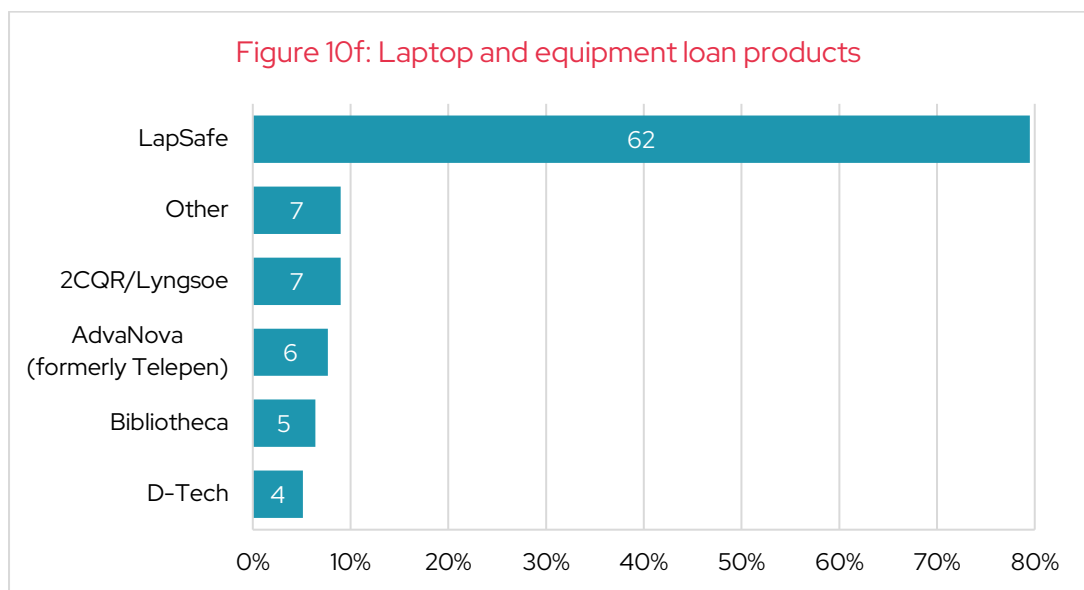
*... We had originally purchased a smart-phone app, but were unable to make it suitably functional and had to request a refund.*

## 10B Laptop and equipment loans

Survey respondents were asked the following:

Please include (typically RFID based) 'kiosks', smartphone (app) based solutions and products to enable unstaffed libraries, as well as self-service laptop loan solutions such as LapSafe.

10.9 Figure 10f highlights the dominance of LapSafe for laptop and equipment loans and it was used at almost 80% of responding institutions.



Percentages are based on 78 respondents indicating they used any of the products or services.

10.10 Overall, seven respondents indicated they used at least one 'other' system, and these are listed in Table 10.

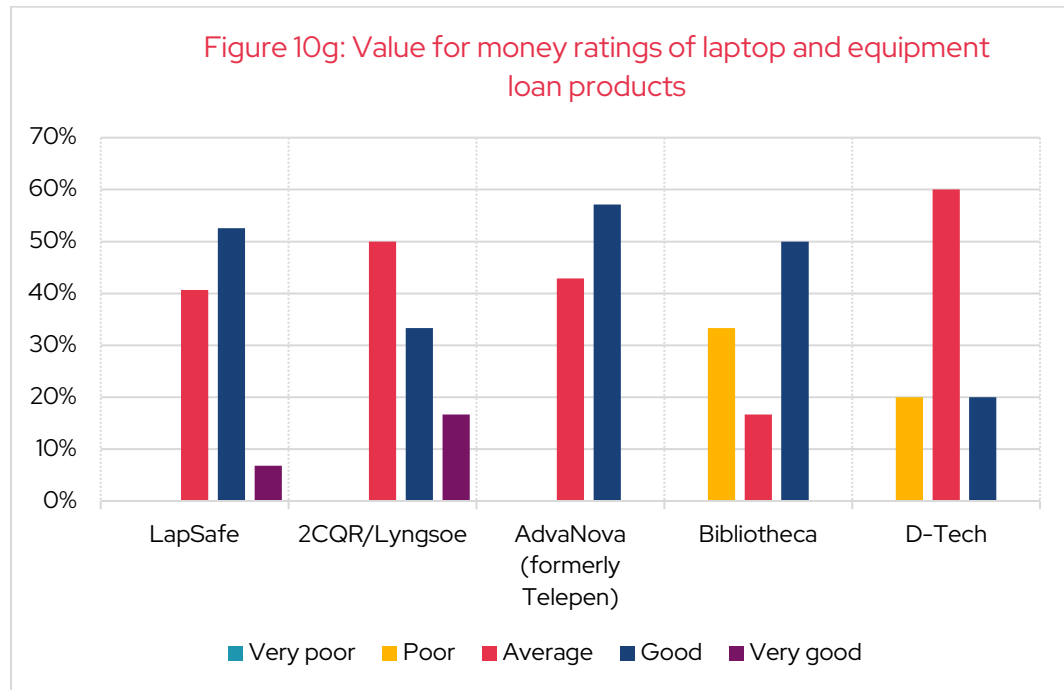
**Table 10: Other systems used for laptop and equipment loans**

(number of respondents in brackets)

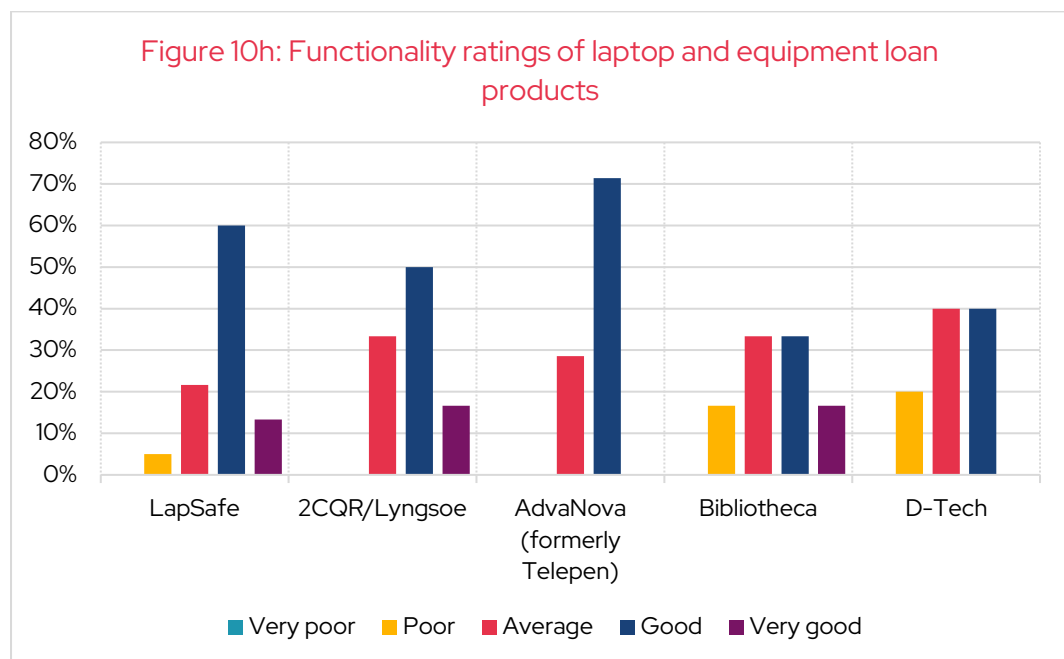
- |   |   |
|---|---|
| <ul style="list-style-type: none"> <li>• Myritrac (3)</li> <li>• Traka (2)</li> <li>• Alma (1)</li> </ul> | <ul style="list-style-type: none"> <li>• Chargebox (1)</li> <li>• Connect2 Lorensburgs (1)</li> </ul> |
|---|---|

10.11 Figure 10g (page 48) illustrates that, the systems used for laptop and equipment loans generally do not perform very highly, with the proportion of respondents considering them to provide 'good' or 'very good' value for money ranging from 20% for D-Tech to 59% for LapSafe. However, Bibliotheca and D-Tech were the only two systems to be rated below average by any respondents, although it should be

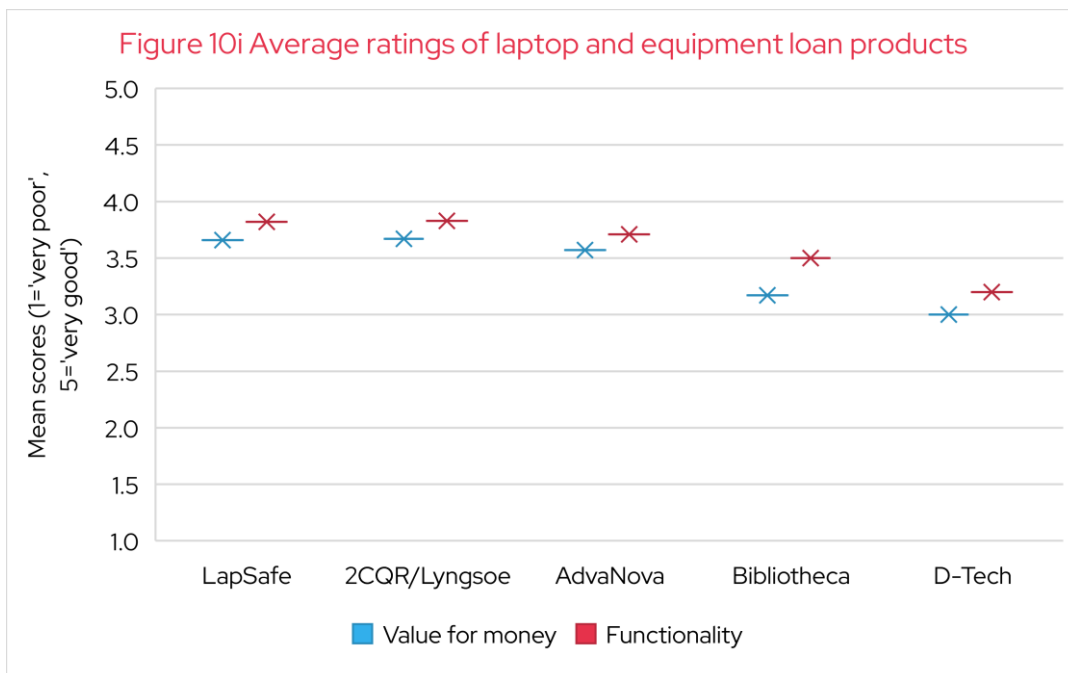
noted that only LapSafe was rated by more than seven respondents for both value for money and functionality.



10.12 Overall, the proportion of respondents considering a system to provide ‘good’ or ‘very good’ functionality ranged from 40% for D-Tech to 73% for LapSafe (Figure 10h), with all systems except for Bibliotheca performing better for functionality than for value for money.



10.13 Figure 10i displays the average ratings for value for money and functionality and highlights that none of the systems achieved an average rating above 4.0, corresponding to a 'good' rating. Figure 10i also illustrates that all systems performed slightly better for functionality than for value for money, on average, with 2CQR/Lyngsoe scoring the highest for both – slightly above LapSafe. However, it should be noted that, apart from LapSafe, the averages are based on fewer than eight respondents.

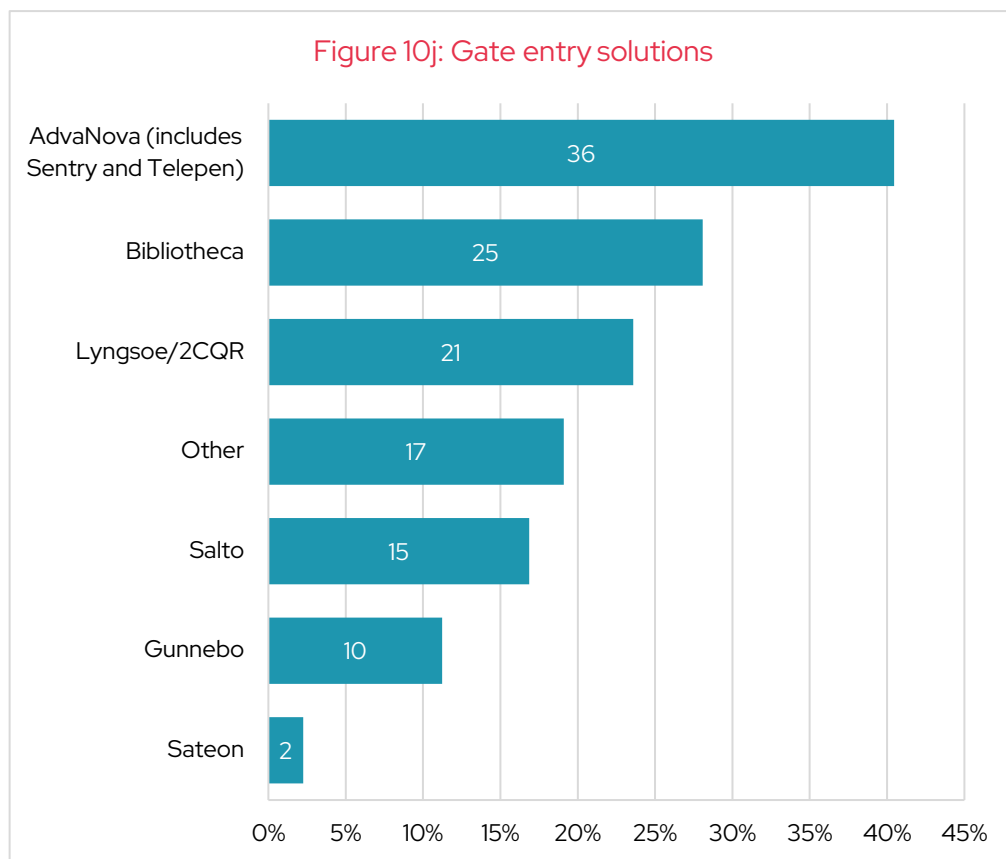


## 10C Gate entry solutions

Survey respondents were asked the following:

If your gate entry system is paid for centrally, please liaise with the relevant department to come up with an accurate value for money appraisal.

10.14 Figure 10j illustrates the wide range of gate entry solutions used across the sector, with AdvaNova the most popular (36 respondents, 40%), followed by Bibliotheca (25 respondents, 28%) and Lyngsoe/2CQR (21 respondents, 24%). Salto was a gate entry solution at fifteen responding institutions (17%), Gunnebo was used at ten responding institutions (11.2%), while Sateon was used at just two responding institutions (2.2%) and is omitted from Figures 10j-m.



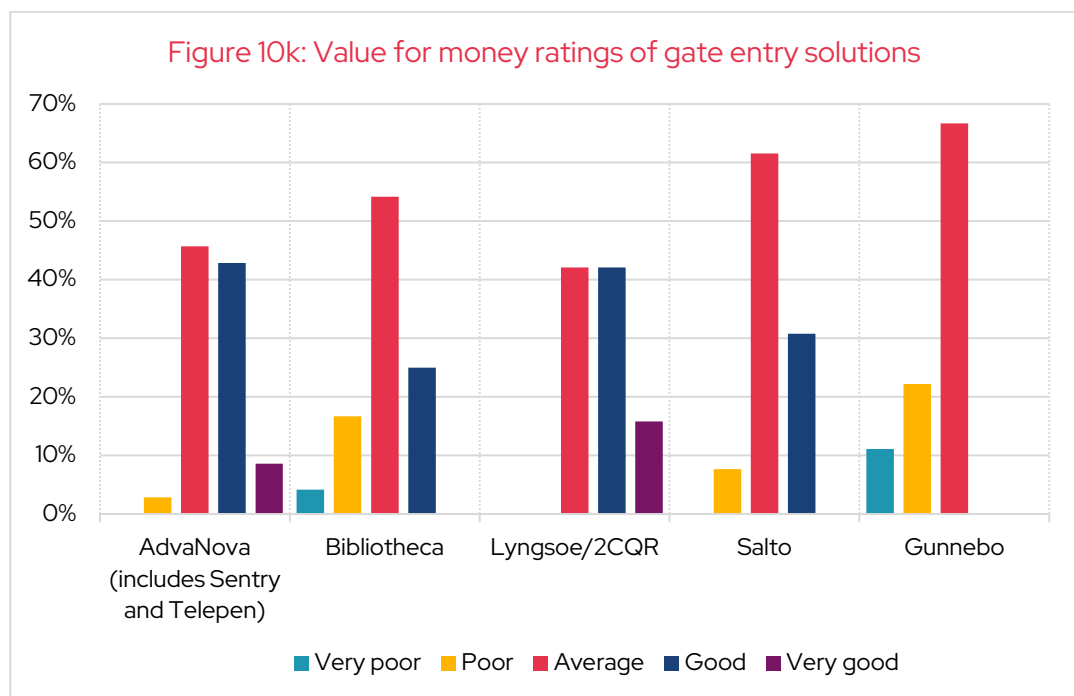
Percentages are based on 89 respondents indicating they used any of the products or services.

10.15 Overall, 17 respondents indicated they used at least one 'other' system, and these are listed in Table 11.

**Table 11: Other gate entry solutions**  
(number of respondents in brackets)

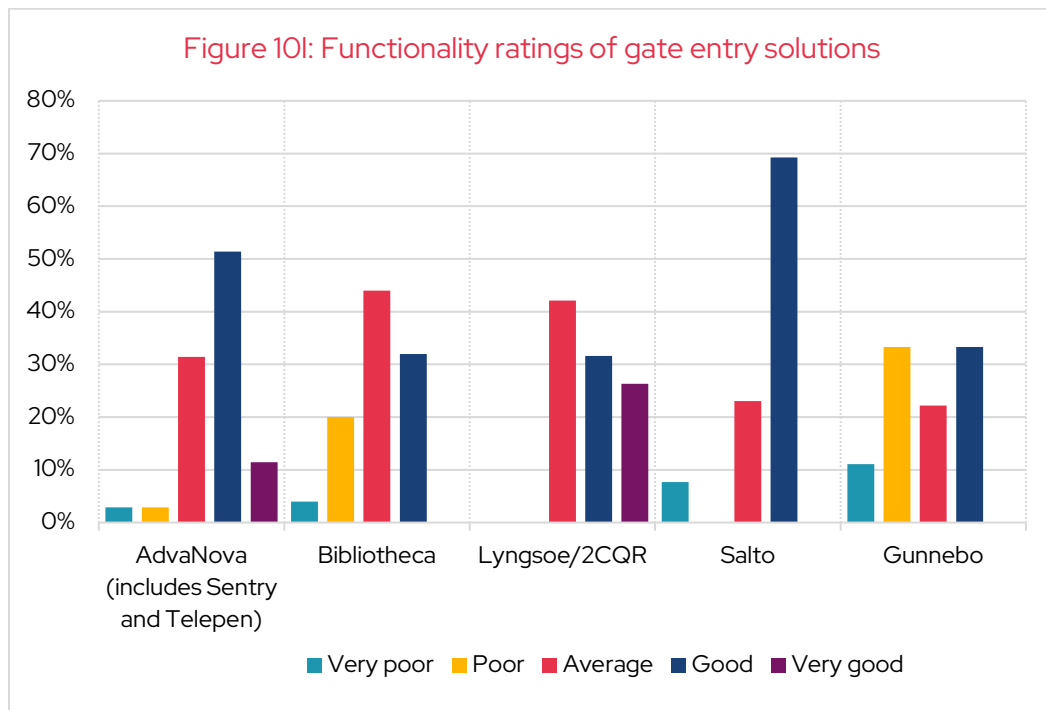
- |   |  |
|---|--|
| <ul style="list-style-type: none"> <li>• D-Tech (4)</li> <li>• dormakaba (2)</li> <li>• Fastlane (2)</li> <li>• G4S Symmetry (2)</li> <li>• Acre Security (1)</li> <li>• Affluence (1)</li> </ul> | <ul style="list-style-type: none"> <li>• Automatic Systems (1)</li> <li>• Boon Edam (1)</li> <li>• EDS UK (1)</li> <li>• Gallagher - access control software (1)</li> <li>• Securitas (1)</li> </ul> |
|---|--|

10.16 Figure 10k illustrates that the gate entry solutions used at responding institutions are generally considered to have relatively low satisfaction levels for value for money. Overall, the proportion of respondents considering the solutions to provide 'average' value for money ranged from 42% for Lyngsoe/2CQR to 67% for Gunnebo. Additionally, none of the nine respondents rating Gunnebo rated it positively. There were variations between respondents, however, and some solutions performed better than others, with more than half of respondents rating AdvaNova (51%) and Lyngsoe/2CQR (58%) considering them to offer 'good' or 'very good' value for money.

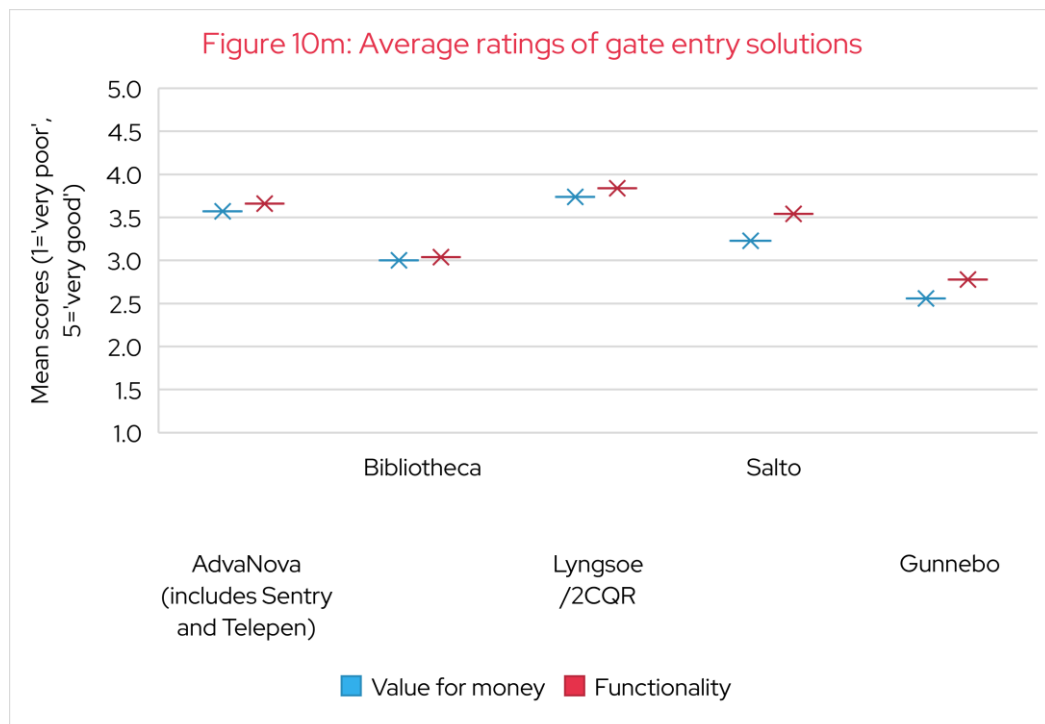


10.17 Figure 10l (page 53) highlights that almost 70% of respondents perceived Salto's functionality to be 'good', compared to 62% of respondents considering it to provide 'average' value for money. The overall proportion of respondents rating the solutions as 'good' or 'very good' ranged from 32% for Bibliotheca to 69% for Salto,

and the solutions generally performed better for functionality than for value for money, except for Lyngsoe/2CQR with 58% of respondents rating it 'good' or 'very good' for both.



10.18 Figure 10m illustrates that all gate entry solutions achieved slightly higher average ratings for functionality than for value for money, which is perhaps not surprising given the relatively low ratings for value for money; however, there is generally little difference between the two averages. Gunnebo received the lowest averages for both value for money (2.6) and functionality (2.8), while Lynsgoe/2CQR received the highest average rating for both.



10.19 Some respondents expressed their frustration with the current software management of these services and indicated that they would prefer cloud-based hosting:

*With both suppliers we use we have software to run the equipment and provide functionality such as gate counts installed on local devices which is often inconvenient as it is sometimes not noticed when it has failed for external reasons. We would very much like this cloudbased [sic] and off-site*

10.20 Others mentioned the lack of competition in this area and the possible lack of developments as a result:

*... It would be good to see more innovation (at a more affordable level) in the market.*

10.21 There was also a consensus that gate entry solutions, and in particular the equipment, tend to be expensive and in the current economic climate it is hard to justify the level of expenditure required:

*... Security gates in general are costly and it is difficult to see whether they pay for themselves in terms of loss of stock.*

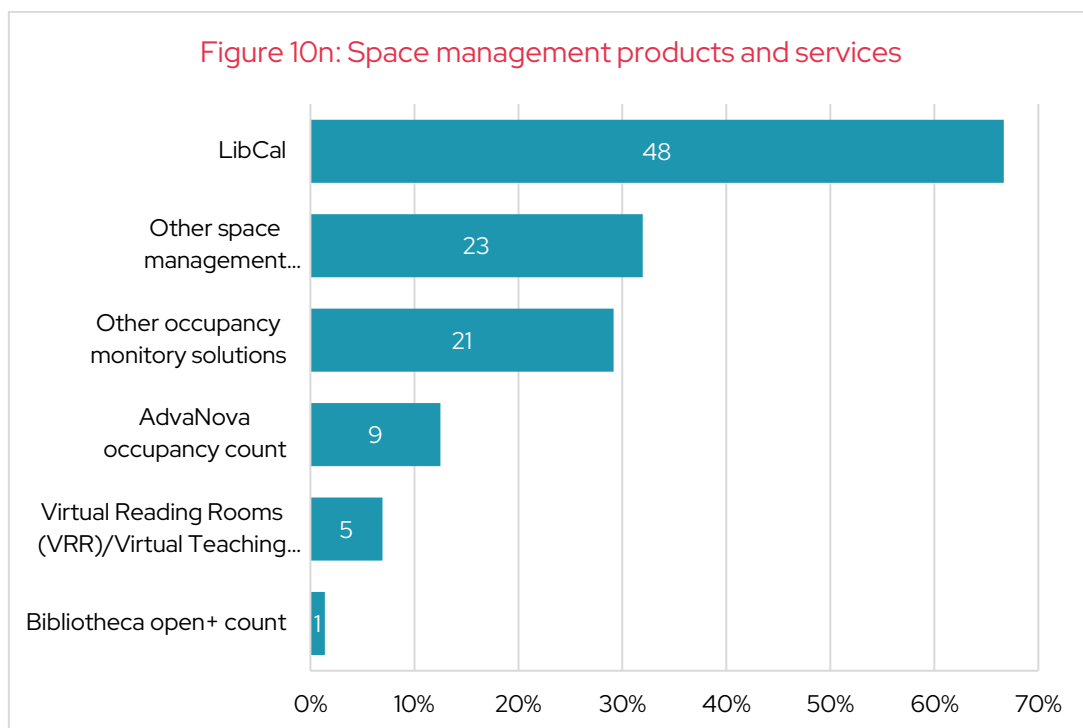


## 10D Library and learning spaces management

Survey respondents were given the following guidance:

Please include solutions to monitor the occupancy of the library (e.g. Bibliotheca open+ count).

Please also include Virtual Reading Rooms (VRR) and Virtual Teaching Spaces (VTS) solutions.



Percentages are based on 72 respondents indicating they used any of the products or services.

10.22 Figure 10n displays the systems used for library and learning space management and highlights that LibCal was used at two-thirds of responding institutions, while other space management technologies were used at 23 responding institutions (32%) and other occupancy monitoring solutions were used at 21 responding institutions (29%).

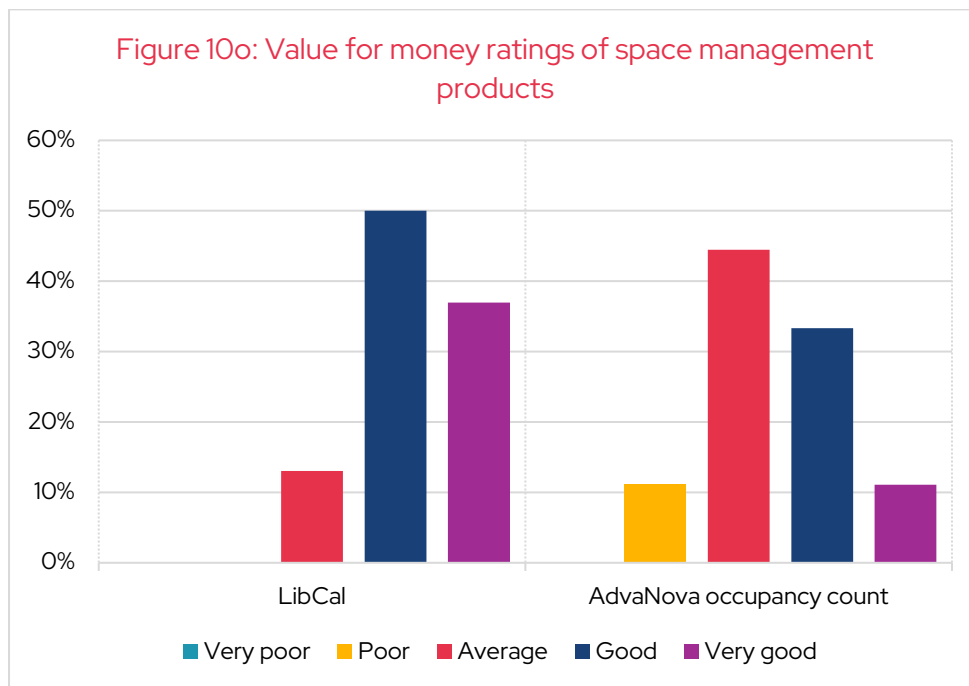
10.23 Table 12 (page 55) presents the other occupancy monitoring solutions noted by respondents and Table 13 (page 55) provides details of the other space management technologies used at responding institutions. Note that it was not always clear whether the noted system was used for monitoring occupancy or for space management and there may be some inaccuracies in Tables 12 and 13.

Table 12: Other occupancy monitoring solutions (number of respondents in brackets)	
<ul style="list-style-type: none"> <li>• Affluences (3)</li> <li>• Bespoke/in-house (3)</li> <li>• Occupeye (3)</li> <li>• Pen and paper/headcounts (2)</li> <li>• Aspex (1)</li> <li>• Axiomatic (1)</li> </ul>	<ul style="list-style-type: none"> <li>• CMISGo (1)</li> <li>• Hoxton (1)</li> <li>• Juno Sentry (1)</li> <li>• MyPC (1)</li> <li>• SafeCount from Irysis (1)</li> <li>• SmartViz (1)</li> </ul>

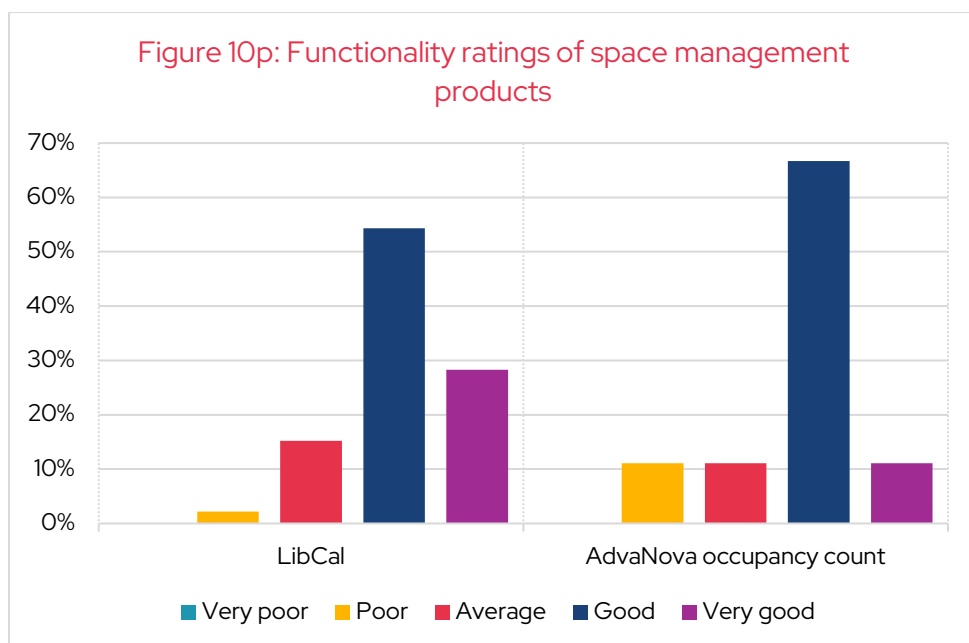
Table 13: Other space management technologies (number of respondents in brackets)	
<ul style="list-style-type: none"> <li>• Resource Booker (3)</li> <li>• Connect2 (2)</li> <li>• Bespoke (1)</li> <li>• ClusterMarket (1)</li> <li>• Event Map Booker (1)</li> <li>• In-house (1)</li> <li>• IoT (1)</li> <li>• Lyngsoe gate counter (1)</li> <li>• MazeMap (1)</li> </ul>	<ul style="list-style-type: none"> <li>• MyPC (1)</li> <li>• Pacom (1)</li> <li>• Planon (1)</li> <li>• Salto accesses (1)</li> <li>• Sentry (1)</li> <li>• SmartViz (1)</li> <li>• Smartway (1)</li> <li>• Spreadsheets (1)</li> <li>• Thermal sensors from AdvaNova (1)</li> </ul>

10.24 Note that as other occupancy monitoring solutions and other space management systems do not correspond to single systems, they have been omitted from the charts that follow.

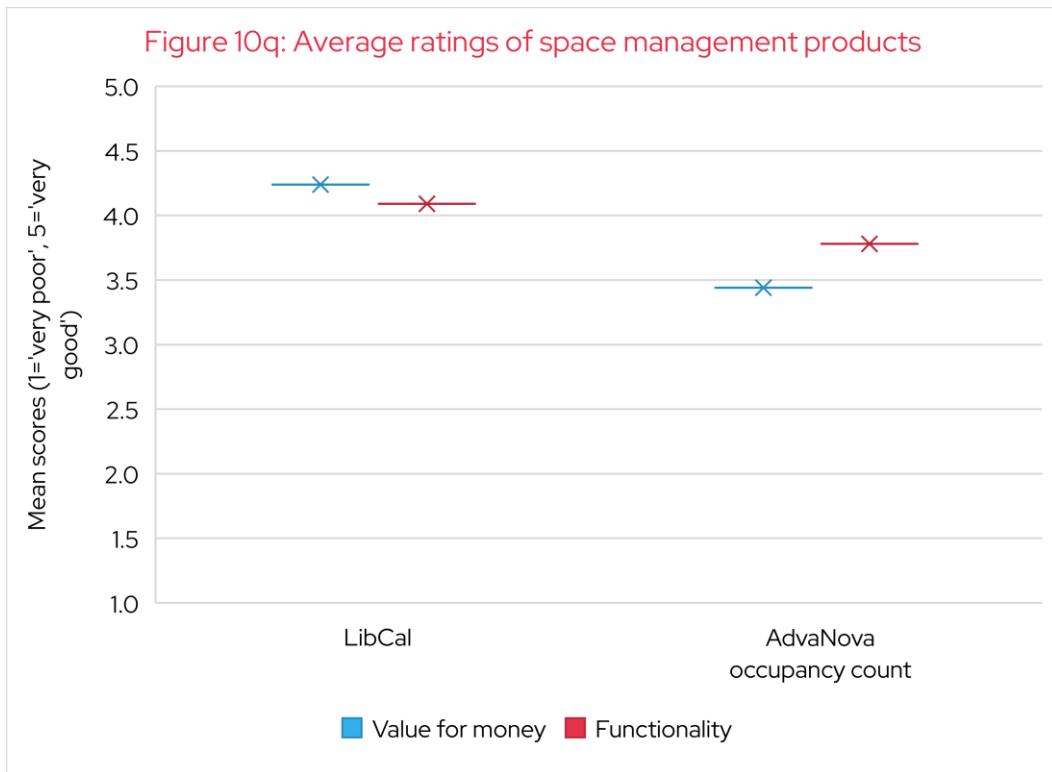
10.25 Figure 10o (page 56) displays the value for money ratings of space management products and services and illustrates that LibCal rates higher, with 87% of respondents indicating it offered 'good' or 'very good' value for money, compared to 44% of respondents rating AdvaNova occupancy count as highly.



10.26 Figure 10p highlights that AdvaNova occupancy count performs better when we consider functionality, with around three-quarters of respondents rating it positively, while 83% of respondents considered LibCal to provide 'good' or 'very good' functionality.



10.27 This is confirmed by Figure 10q (page 57) which highlights that LibCal achieves average ratings above 4.0 for both value for money and functionality, indicating that respondents generally rated the system positively, compared to averages below 4.0 for AdvaNova.



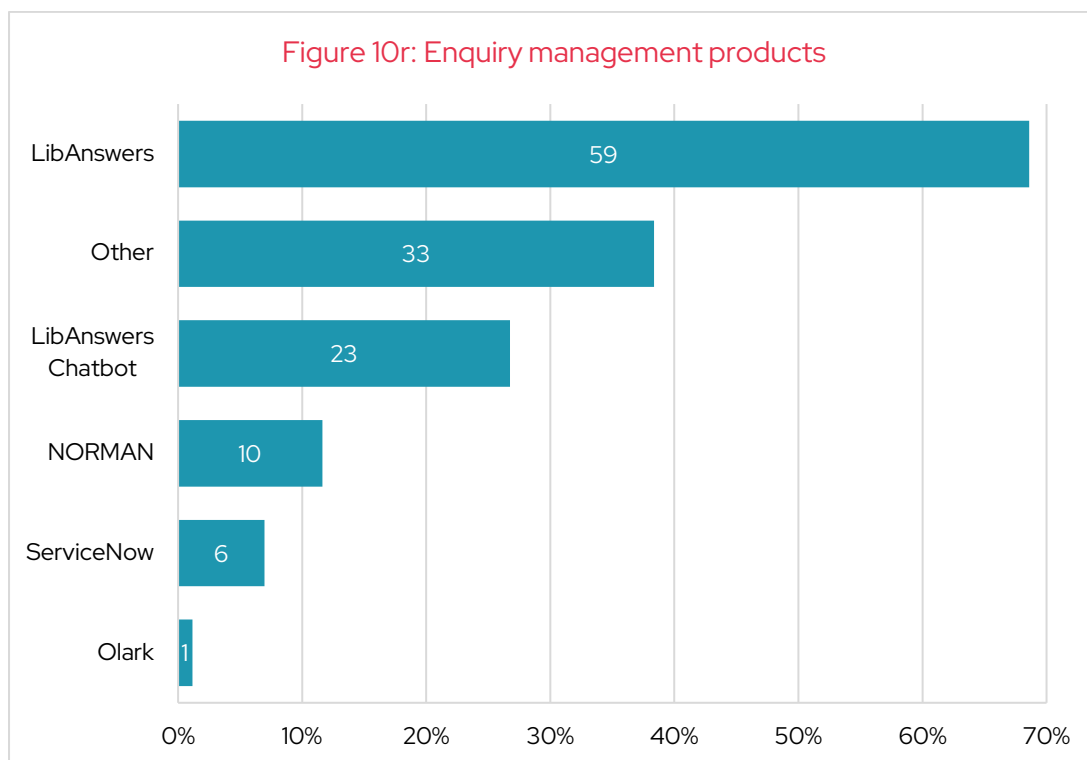
10.28 Several respondents included additional comments on space management solutions; however, these largely provided more detail on the use of the solutions at individual institutions with no common themes emerging.

## 10E Enquiry management

Survey respondents were given the following guidance:

Please include:

- enquiry management solutions that are library-specific e.g. LibAnswers
- solutions from other providers such as ServiceNow that may be licensed by the institution
- AI-based ChatBot services such as LibAnswers Chatbot from Springshare
- locally developed enquiry and Chatbot services.



Percentages are based on 86 respondents indicating they used any of the products or services.

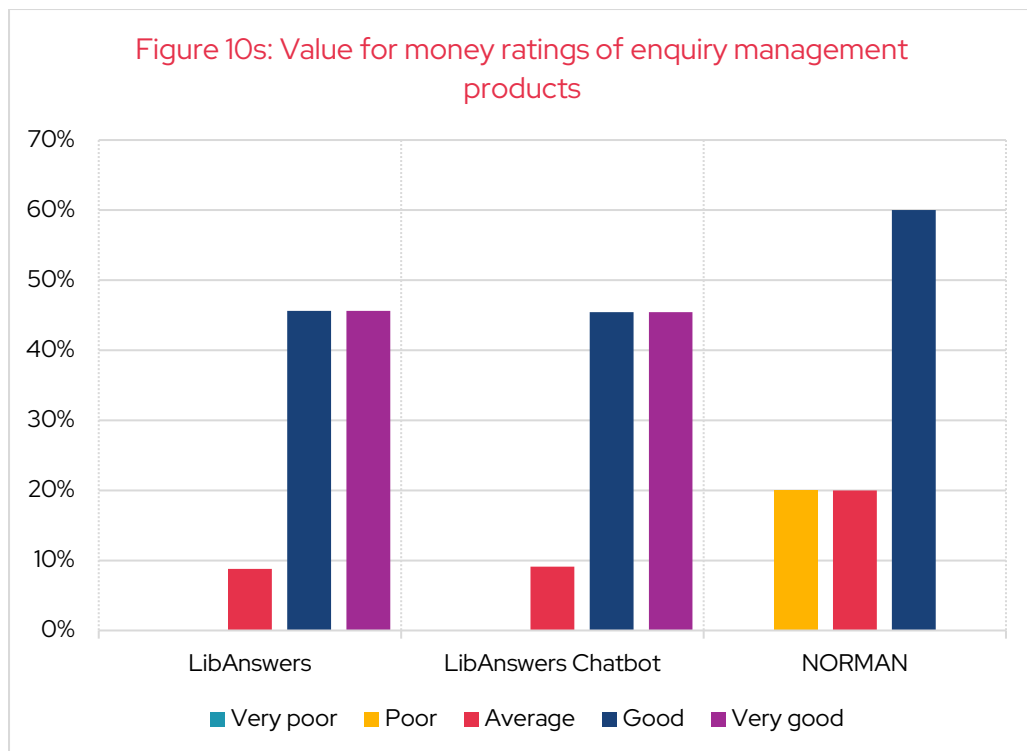
10.29 LibAnswers was the most popular enquiry management tool (Figure 10r) and was used at 59 responding institutions (69%), followed, some way behind, by LibAnswers Chatbot (23 respondents, 27%), NORMAN (ten respondents, 11.6%) and ServiceNow (six respondents, 7.0%). Olark was used at just one responding institution and has been omitted from the charts that follow. Overall, 33 respondents reported they used at least one 'other' solution and these are listed in Table 14 (page 60).

**Table 14: Other enquiry management products and services**

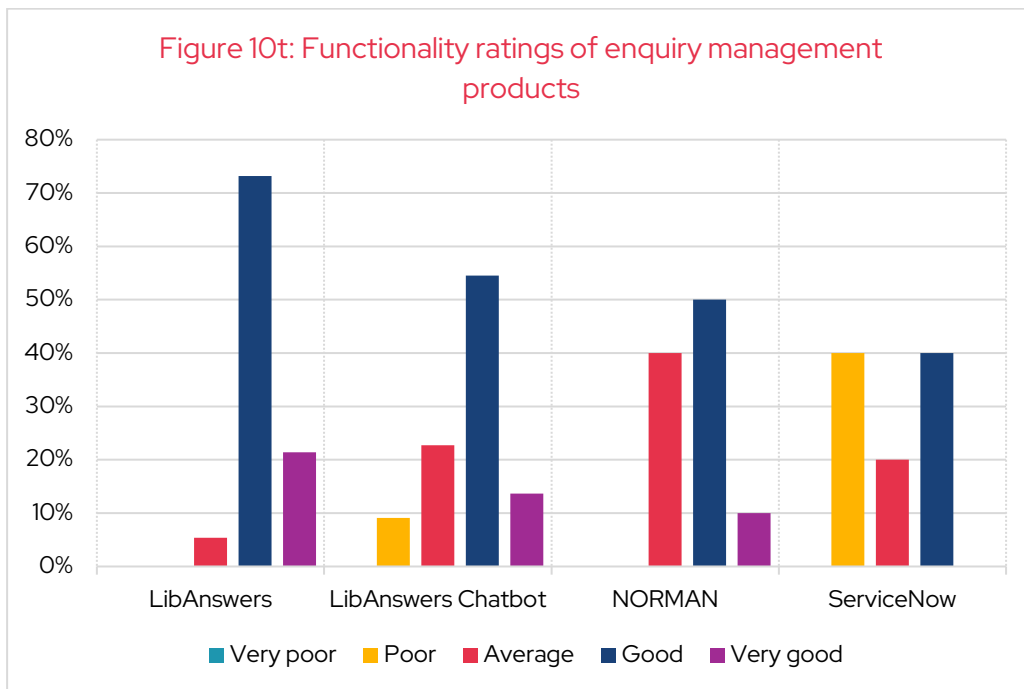
(number of respondents in brackets)

<ul style="list-style-type: none"> <li>• Topdesk (5)</li> <li>• LibraryH3lp (4)</li> <li>• Ivanti (4)</li> <li>• FreshService (3)</li> <li>• LibChat (3)</li> <li>• Tribal (3)</li> <li>• In-house (2)</li> <li>• RequestTracker (2)</li> <li>• Axiell Calm (1)</li> </ul>	<ul style="list-style-type: none"> <li>• Beyond Trust Remote Support (BOMGAR) (1)</li> <li>• Click4Assist Live Chat (1)</li> <li>• Email (1)</li> <li>• Engage to Serve (E2S) (1)</li> <li>• Gecko (1)</li> <li>• JIRA (1)</li> <li>• Snapengage (1)</li> <li>• Unishare (1)</li> </ul>
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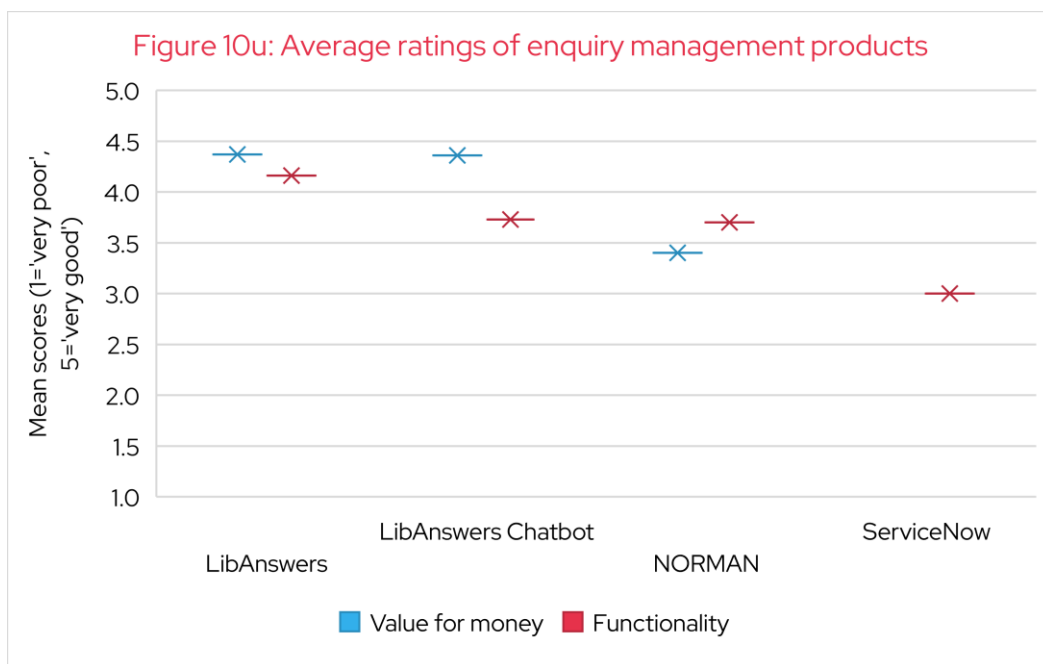
10.30 Figure 10s highlights the largely positive ratings for both LibAnswers and LibAnswers Chatbot, with just over 90% of respondents considering each tool to provide 'good' or 'very good' value for money. NORMAN achieved a wider spread of ratings, with two out of the ten respondents rating it considering it to provide 'poor' value for money, while two respondents rated it 'average'. Just four respondents rated ServiceNow for value for money and it has been omitted from Figure 10s, although full details are available in the Library Technology Landscape: Supplementary Tables document available on the SCONUL website.



10.31 Figure 10t highlights that LibAnswers also performed well for functionality, with 95% of respondents rating it as 'good' or 'very good', compared to just over two-thirds of respondents rating LibAnswers Chatbot positively.



10.32 This trend is confirmed when we consider the average ratings of the systems, with Figure 10u (page 61) highlighting the generally positive ratings of LibAnswers for both value for money and functionality. Figure 10u also illustrates that LibAnswers Chatbot performed better for value for money than for functionality, while NORMAN rated higher for functionality, on average.



10.33 Several respondents included additional comments on enquiry management solutions; however, these largely provided more detail on the situation at individual institutions, along with details on additional tools used, with no common themes emerging.

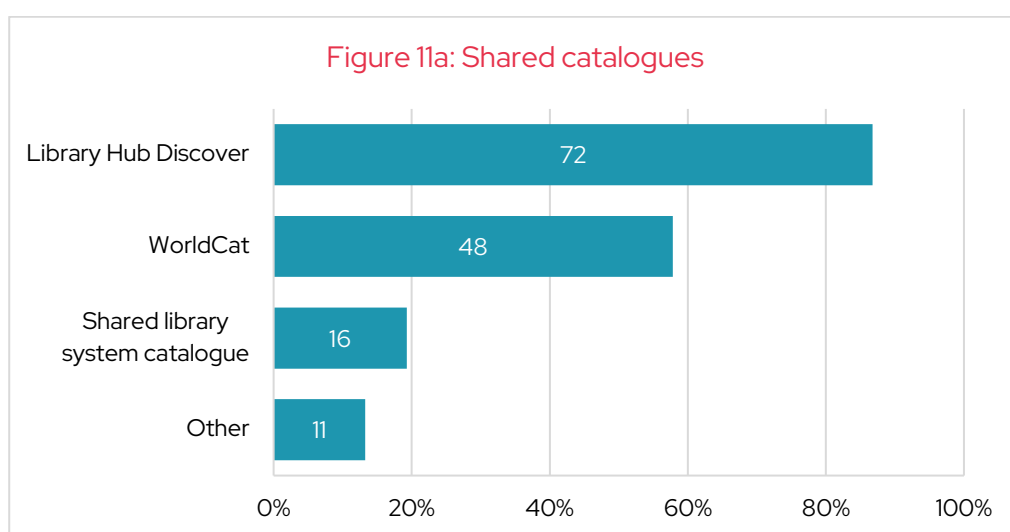


## 11. Shared catalogues

Survey respondents were given the following guidance:

Please include regional, national and international catalogues such as WorldCat (OCLC) and Library Hub Discover (Jisc) as well as shared catalogues based on a shared library system.

11.1 Figure 11a illustrates that Library Hub Discover was used at 87% of responding institutions, while WorldCat was used at 48 responding institutions (58%) and a shared library catalogue system was used at sixteen responding institutions (19%).



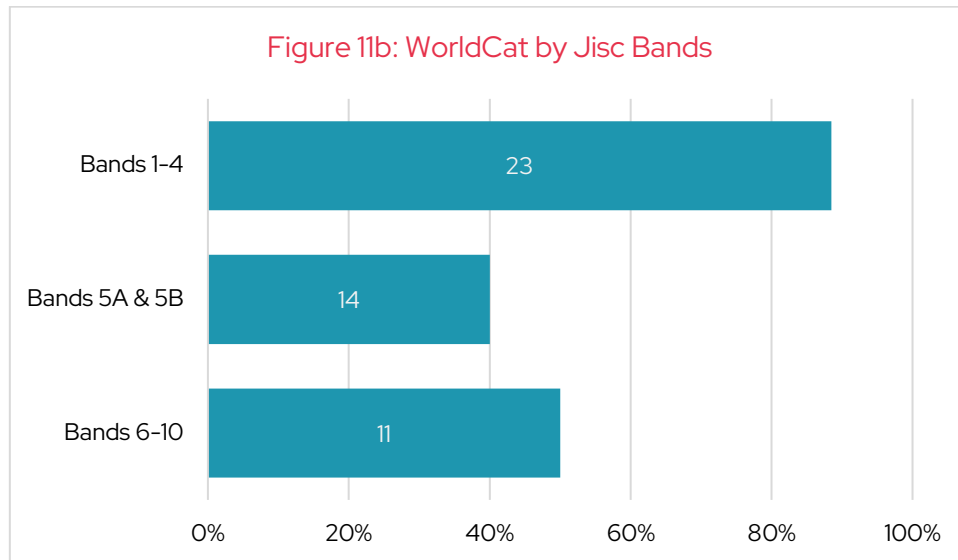
Percentages are based on 83 respondents indicating they used any of the products or services.

11.2 Overall, eleven respondents indicated that they used at least one 'other' shared catalogue, and these are listed in Table 15.

**Table 15: Other shared catalogues**  
(number of respondents in brackets)

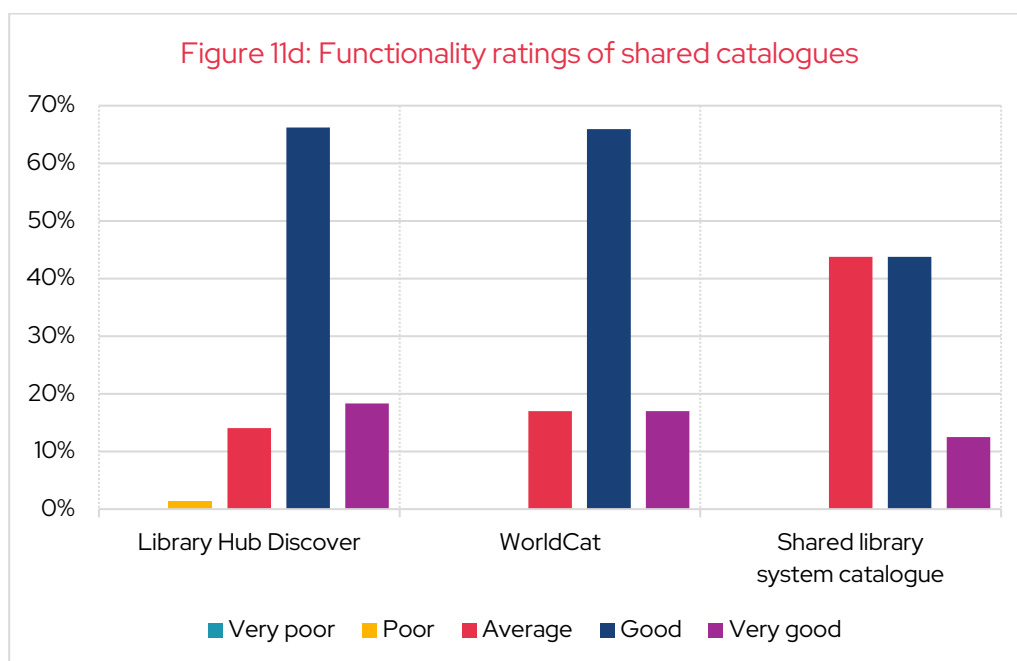
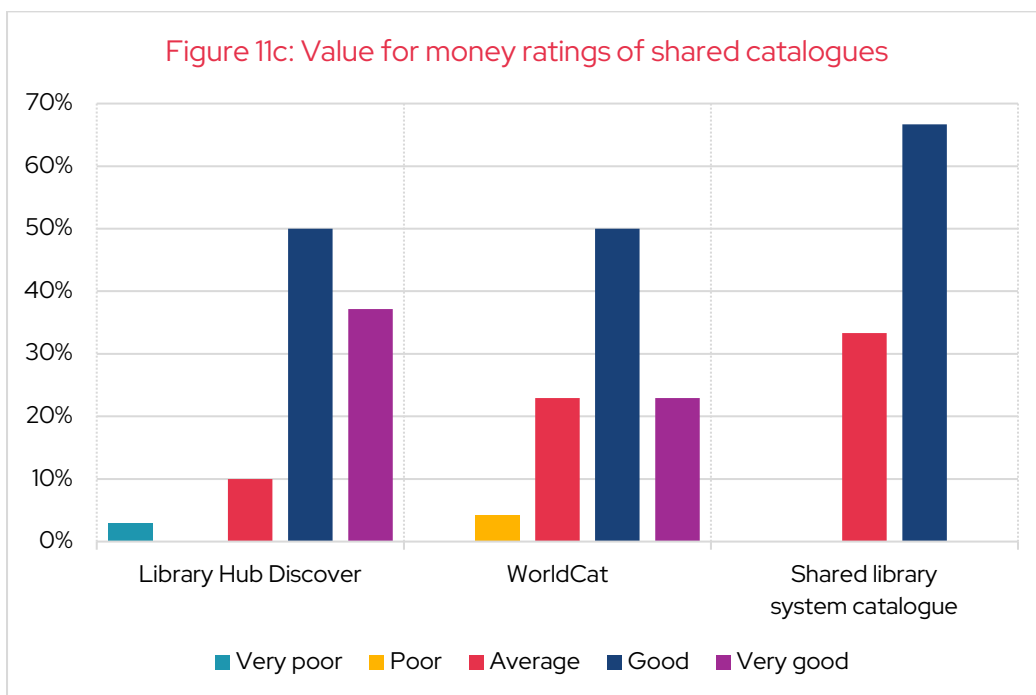
<ul style="list-style-type: none"> <li>• Archives Hub (2)</li> <li>• BDS (1)</li> <li>• BlueCloud Visibility (1)</li> <li>• British Library catalogue (1)</li> <li>• EThOS (British Library) (1)</li> <li>• Ex Libris Community Zone (1)</li> <li>• JISC's National Bibliographic Knowledgebase (NBK) (1)</li> </ul>	<ul style="list-style-type: none"> <li>• Nielsen BookData (1)</li> <li>• NULJ - Nursing Union List of Journals (1)</li> <li>• OCLC, Library of Congress (1)</li> <li>• Talis base (1)</li> <li>• WorldShare Collection Manager (1)</li> </ul>
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11.3 There were statistically significant differences, with responding institutions in Jisc bands 1-4 more likely to use WorldCat than those in bands 5-10 (Figure 11b).

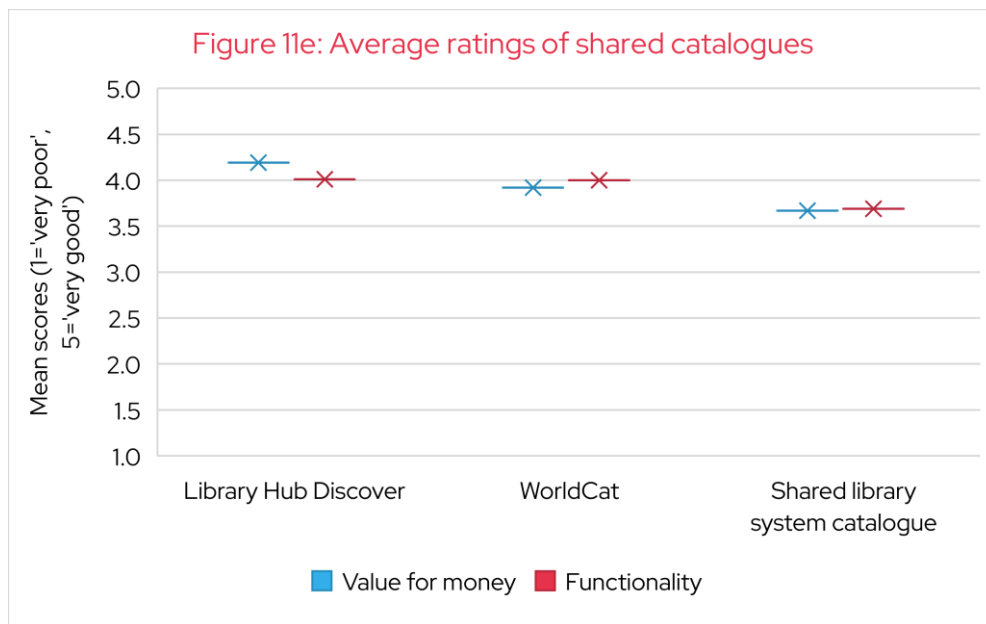


11.4 Figure 11c (page 64) illustrates that Library Hub Discover performs well with half of respondents indicating that it offers 'good' value for money and 37% rating it as 'very good'. WorldCat was also rated as providing 'good' value for money by half of respondents, with an additional 23% rating it as 'very good'. Overall, two-thirds of respondents rated a shared library catalogue as providing 'good' value for money, with the remaining one-third of respondents rating it as 'average'. However, it should be noted that these ratings are unlikely to be based on one individual system.

11.5 Figure 11d (page 64) highlights that around two-thirds of respondents rated both Library Hub Discover and WorldCat as providing 'good' functionality, with an additional 17% rating WorldCat as 'very good' and 18% indicating that Library Hub Discover's functionality was 'very good'. Overall, 44% of respondents rating shared library catalogues indicated they provided 'average' functionality, so that the overall proportion of respondents rating functionality as 'good' or 'very good' (56%) is lower than the two-thirds rating it positively for value for money.



11.6 Figure 11e (page 65) displays the average ratings for shared catalogues and highlights that there is little difference between value for money and functionality. Overall, Library Hub Discover was the only system to achieve an average rating above 4.0, with a mean of 4.2 for value for money, indicating that respondents generally rated the system positively.



- 11.7 Several respondents included additional comments on shared catalogues, although they largely provided more detail on the situation at individual institutions. However, some respondents did express concern with the quality of the metadata:

*... The scope is impressive but some of the data quality leaves something to be desired ...*

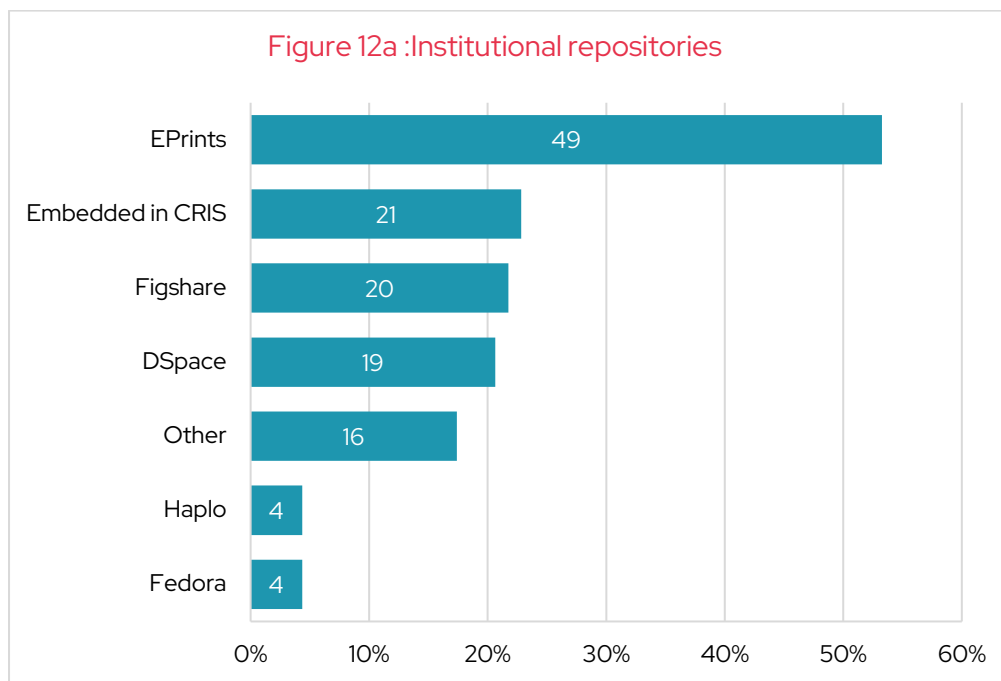
## 12. Institutional repositories

Survey respondents were given the following guidance:

Please include repositories for the management of research outputs (including articles, theses and research data) typically managed by institutional repository products such as Eprints, Dspace, Fedora, Haplo, Pure, Figshare, Zenodo etc.

Please note, Q33 refers to CRIS systems, where you can include more detail on your specific system.

12.1 Figure 12a highlights that EPrints is the most popular service for institutional repositories and was used at just over half of responding institutions (49 respondents, 53%). Additionally, 21 respondents (23%) indicated that the repository function was embedded in the CRIS at their institution, while 20 respondents (22%) reported using Figshare and 19 (21%) noted they used Dspace. Just four respondents (4.3%) indicated they used Haplo or Fedora, although both systems have been rated by five respondents and are included in the charts that follow. Overall, 18 respondents indicated that they used at least one 'other' system, and these are listed in Table 16 (page 67).



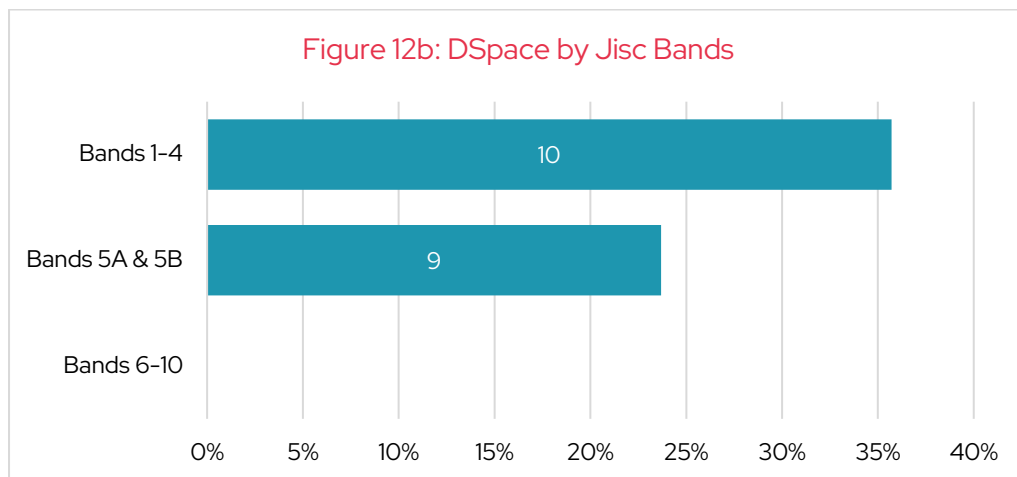
Percentages are based on 92 respondents indicating they used any of the products or services.

**Table 16: Other institutional repositories**

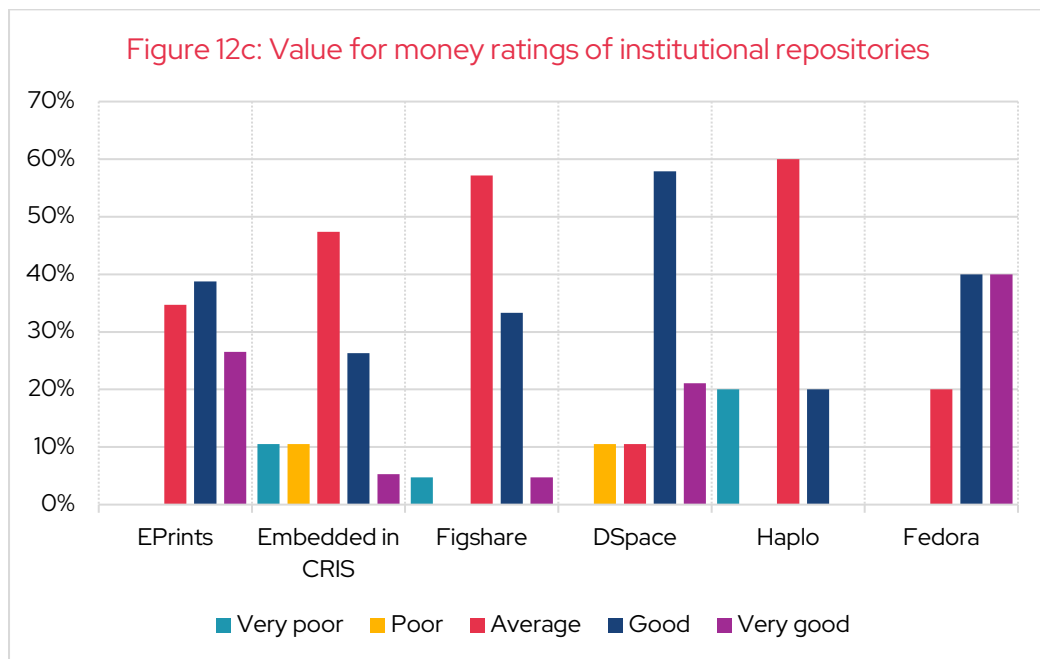
(number of respondents in brackets)

- |   |   |
|---|---|
| <ul style="list-style-type: none"> <li>• Pure (2)</li> <li>• Samvera (2)</li> <li>• Worktribe (2)</li> <li>• CKAN (1)</li> <li>• CREST for GuildHE (1)</li> <li>• Dataverse repository (1)</li> <li>• DropBox linked to Pure (1)</li> </ul> | <ul style="list-style-type: none"> <li>• Dryad (1)</li> <li>• Esploro (1)</li> <li>• EThOS (1)</li> <li>• Omeka (1)</li> <li>• OpenEquella (1)</li> <li>• VuFind (1)</li> <li>• Zenodo (1)</li> </ul> |
|---|---|

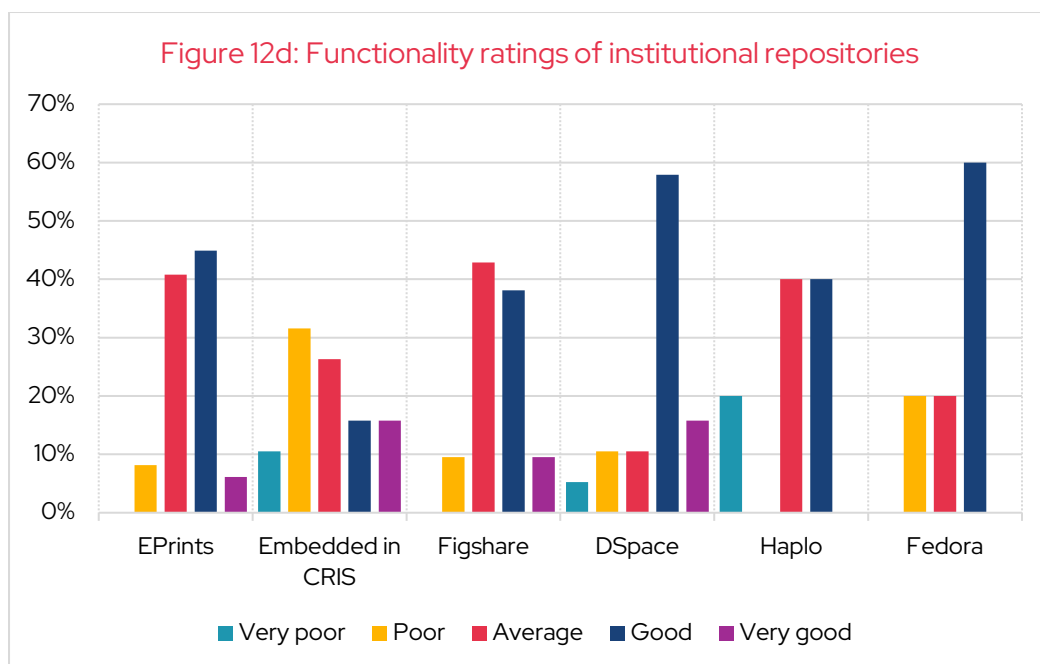
12.2 There were statistically significant differences and Figure 12b illustrates that responding institutions in Jisc bands 1-5 are more likely to use DSpace than those in bands 6-10.



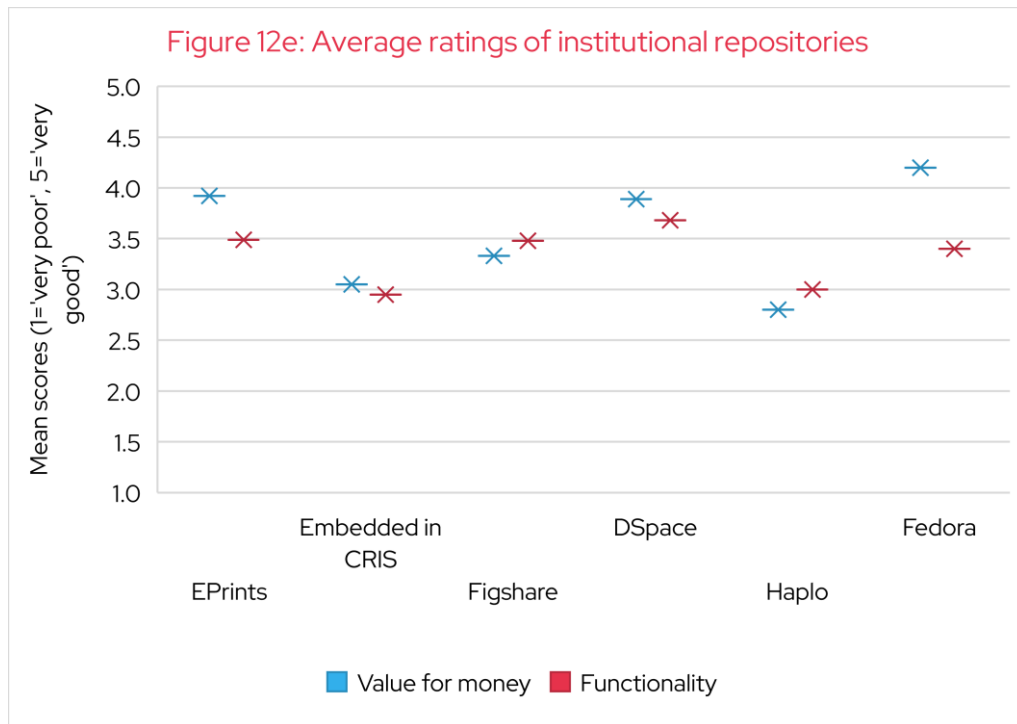
12.3 Figure 12c (page 68) highlights that there is variation in the satisfaction levels across the different institutional repositories. Overall, the proportion of respondents considering the systems to provide 'good' or 'very good' value for money ranges from 20% for Haplo to 80% for Fedora (noting that just five respondents rated these two systems). Following on from this, repositories embedded in the institutional CRIS, Figshare and Haplo all recorded a higher proportion of respondents rating them as 'average' value for money than those that rated them as 'good' or 'very good'.



12.4 Figure 12d displays the functionality ratings of institutional repositories, and when compared to Figure 12c, there is no clear pattern. Figshare and Haplo both record a higher proportion of respondents rating functionality positively than for value for money, while the reverse is true for EPrints, DSpace and Fedora. Overall, the proportion of respondents indicating their institutional repository offered 'good' or 'very good' functionality ranged from 32% for those embedded in the CRIS to 74% for DSpace.



12.5 This is highlighted further by Figure 12e with EPrints, Dspace, Fedora and the repository function being embedded in the institutional CRIS all rating higher, on average, for value for money than for functionality. In contrast, Haplo and Figshare rated slightly higher for functionality, on average. Fedora achieved an average above 4.0 for value for money, indicating that respondents generally rated the system positively, the only system to do so for either rating, although it was only rated by five respondents.



12.6 Several respondents included additional comments on institutional repositories; however, these largely provided more detail on the situation at individual institutions. Some respondents did mention the overall lack of development in the functionality of repositories:

*The technology behind repositories has not particularly moved on very much (certainly as compared to something like an LMS as part of library technology). 'If it ain't broke don't fix it' because they do still do what they need to do - but it would be interesting to explore (again) where this aspect of a library offering is going in the medium term. This could aid planning and future proofing.*



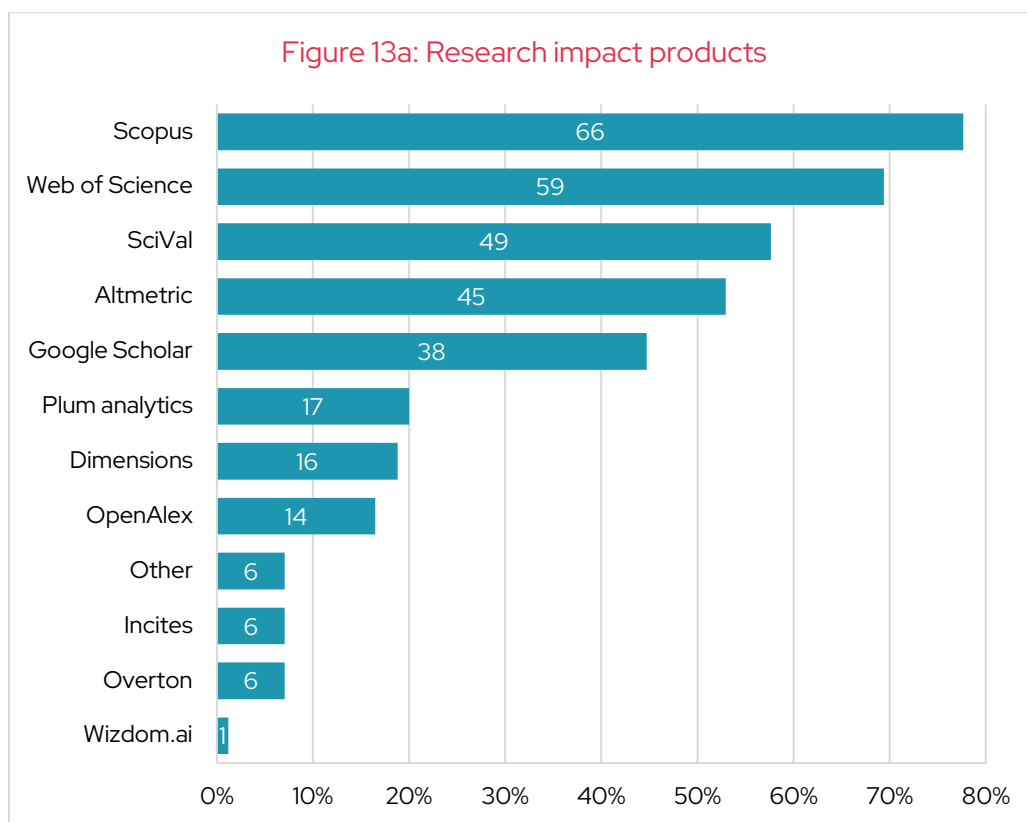
## 13. Research impact and support

### 13A Research impact measurement

Survey respondents were given the following guidance:

Please include solutions from publishers as well as other providers to measure the impact of research outputs.

13.1 Figure 13a highlights the wide range of services for research impact across the sector and illustrates that Scopus was the most popular system and was used at almost 80% of responding institutions. This was followed by Web of Science (59 respondents, 69%), SciVal (49 respondents, 58%), Altmetric (45 respondents, 53%) and Google Scholar (38 respondents, 45%). Overall, 73 respondents (86%) indicated they used more than one system; with 18 (21%) reporting they used more than five systems to measure research impact. Additionally, nine respondents indicated they used at least one 'other' system, with six noting they used Overton, and this has been reflected in the charts that follow. Details of the other systems used at responding institutions are listed in Table 17 (page 71).



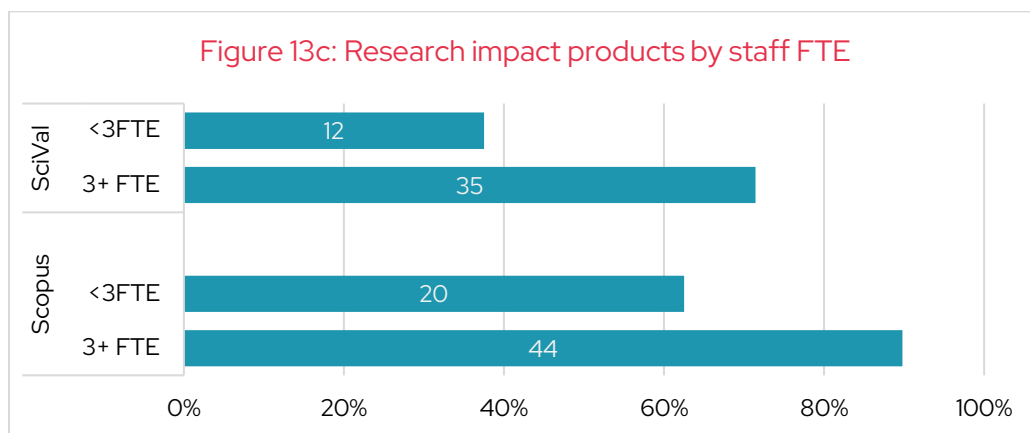
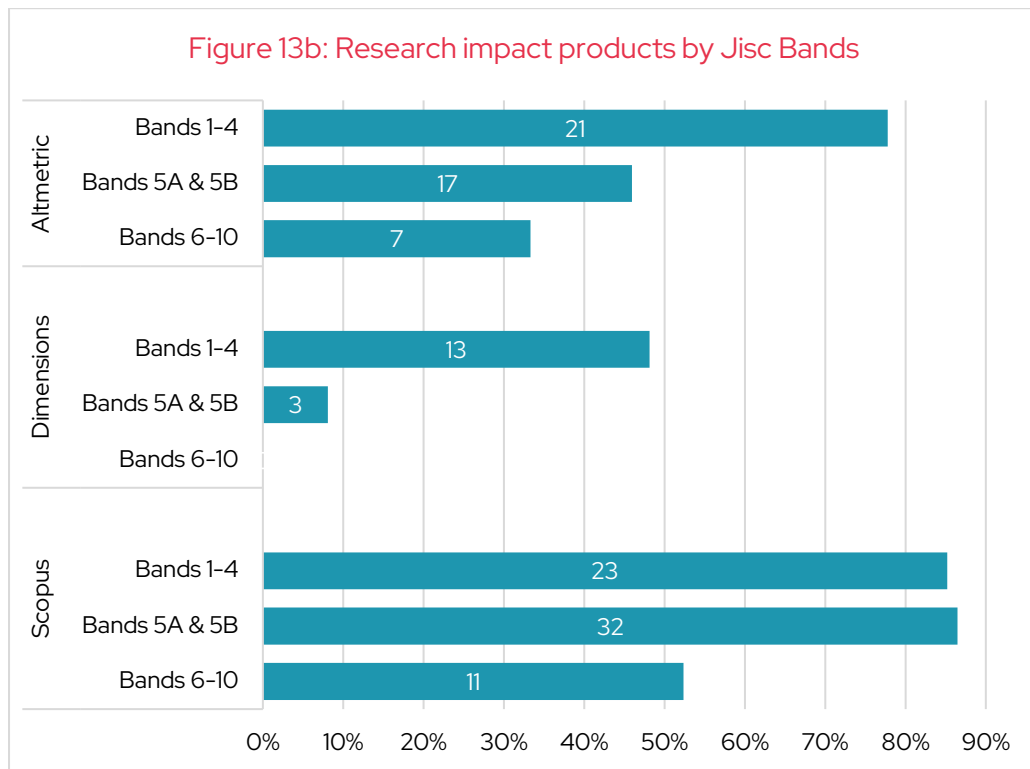
Percentages are based on 85 respondents indicating they used any of the products or services.

**Table 17: Other research impact measurement solutions**

(number of respondents in brackets)

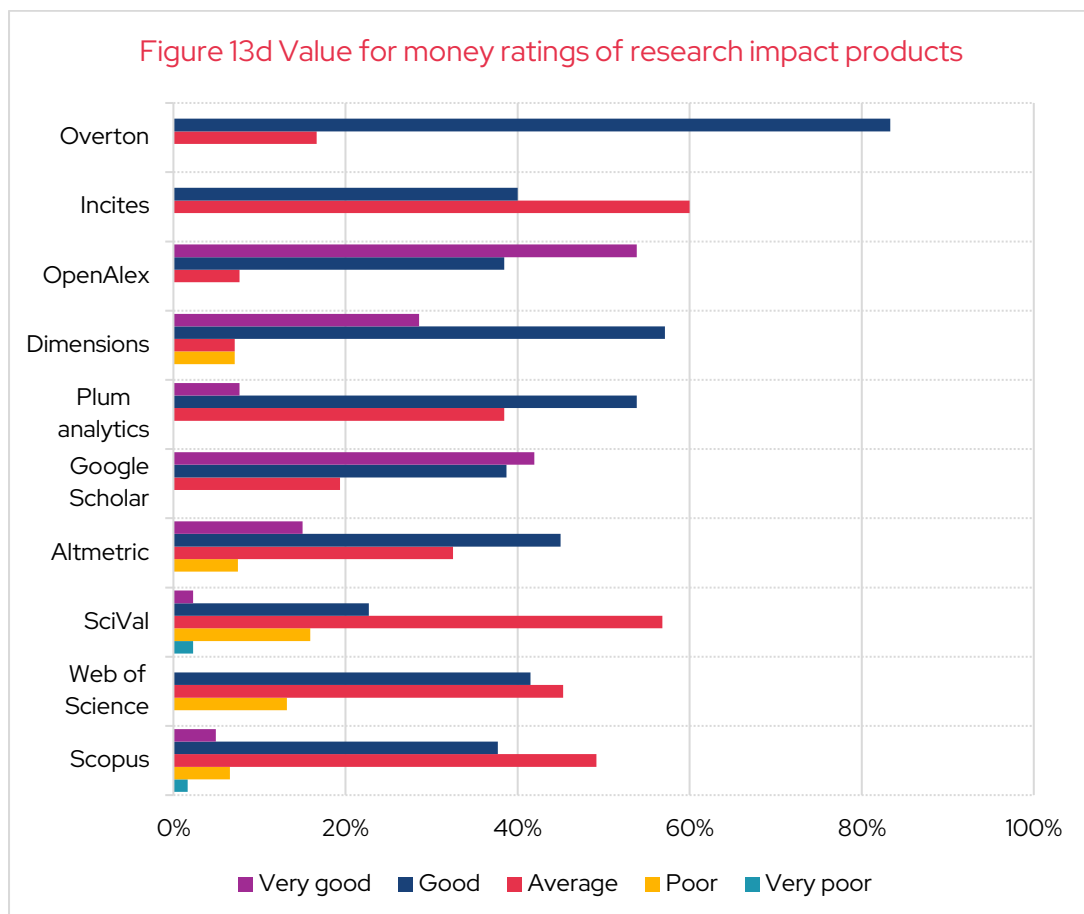
- |  |   |
|--|---|
| <ul style="list-style-type: none"> <li>Elsevier DataMonitor (1)</li> <li>IRUS (1)</li> <li>Journal Citation Reports (1)</li> </ul> | <ul style="list-style-type: none"> <li>Kevri (1)</li> <li>Rayyan (1)</li> <li>THE DataPoints (1)</li> </ul> |
|--|---|

13.2 There were statistically significant differences with Figure 13b illustrating that responding institutions in bands 1-4 are more likely to use Altmetric and Dimensions than those in bands 5-10. Additionally, responding institutions in bands 1-5 are more likely to use Scopus than those in bands 6-10.



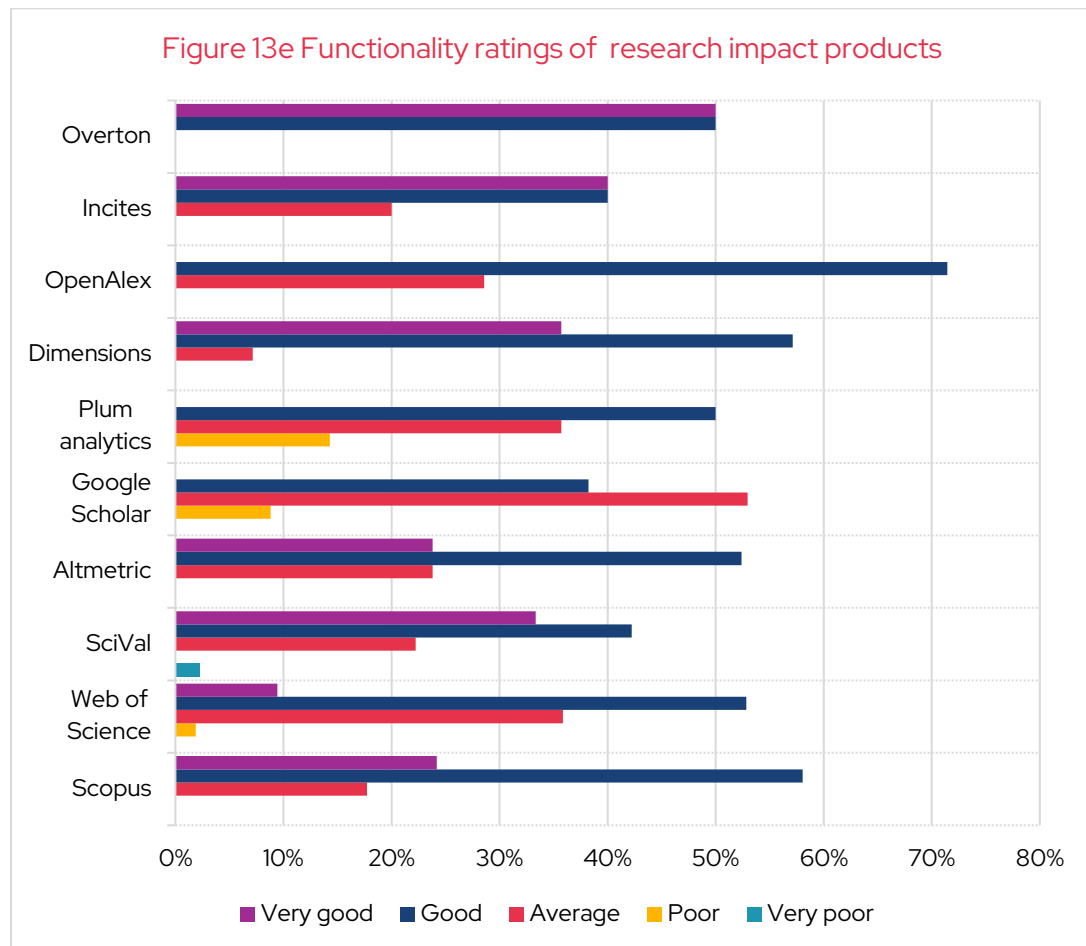
13.3 Figure 13c (page 71) highlights that those institutions with three or more FTE staff devoted to supporting library technology are more likely to use SciVal or Scopus than those institutions with fewer than three FTE staff.

13.4 Figure 13d illustrates the wide range of value for money ratings for services measuring research impact, and it should be noted that the ratings for Overton and Incites are based on fewer than seven respondents. Google Scholar, Dimensions, Overton and OpenAlex all perform highly, with more than 80% of respondents positively rating them for value for money. In contrast, Incites, SciVal, Scopus and Web of Science were considered to provide 'good' or 'very good' value for money by less than 50% of respondents rating these services. Additionally, Web of Science and SciVal were the only systems to be rated below average by more than 10% of respondents, with seven (13.2%) considering Web of Science to provide 'poor' value for money, and eight (18%) rating SciVal as 'poor' or 'very poor'.

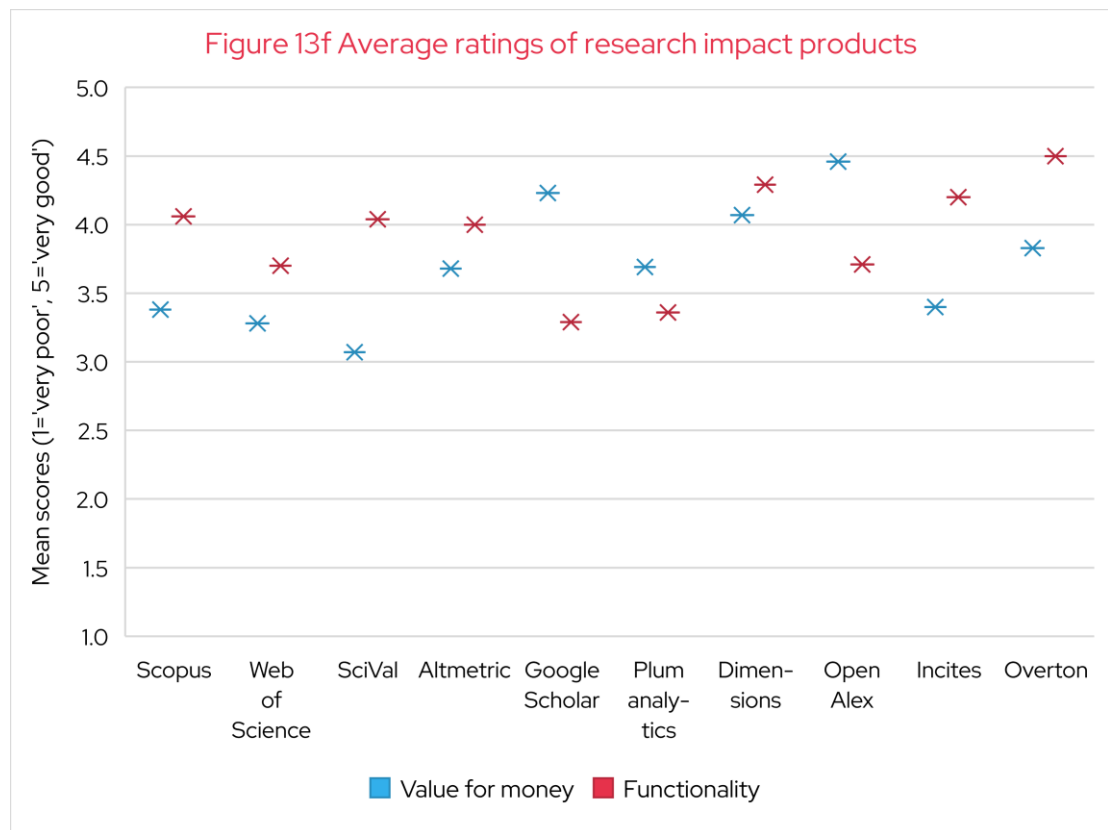


13.5 Google Scholar performs poorly for functionality (Figure 13e, page 73), with 38% of respondents rating it as 'good' or 'very good', compared to 81% rating it positively for value for money. In contrast, except for Plum Analytics and OpenAlex, the remaining systems all perform better for functionality than for value for money, with

the overall proportion of respondents considering a service to offer 'good' or 'very good' functionality ranging from 38% for Google Scholar to 100% for Overton, although the latter was only rated by six respondents.



13.6 Figure 13f (page 74) displays the average ratings for value for money and functionality and highlights that SciVal shows the largest variance between the two, with an average rating of 3.1 for value for money (corresponding to an 'average' rating), compared to 4.0 for functionality (corresponding to a 'good' rating). Notably, Scopus, SciVal, Dimensions, Incites and Overton all achieved average ratings above 4.0 for functionality, while Google Scholar, Dimensions and OpenAlex all achieved averages above 4.0 for value for money, indicating that respondents generally rated these systems positively.



13.7 Several respondents included additional comments on research impact products; however, these largely provided more detail on the situation at individual institutions and the use of the different systems. Some respondents did mention that some or all of the research impact metric services available at their institution were possibly underused:

*Our 'poor' value for money rating is given because Scopus and SciVal are underused in our organisation. There are several factors for this: both the tools and the intelligence gained are complex; value is throttled by limitations in the resource required to deploy them widely, whether this be within research support services or by individual researchers; they provide indicators, not facts; some of our subject areas are not given to their use.*

## 13B Research support management

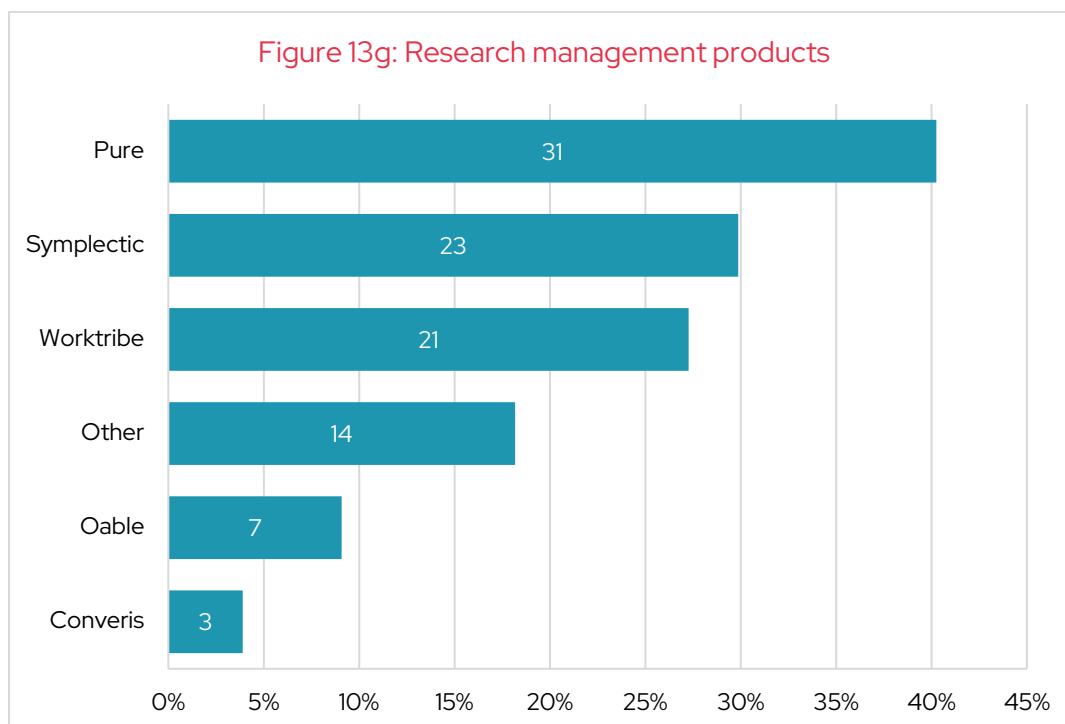
Survey respondents were given the following guidance:

Please include CRIS solutions (also known as Research Information Management (RIM) Systems) such as Pure (Elsevier), Converis (Clarivate), Symplectic (Digital Science) and Worktribe.

Please also include open access management software such as Oable (Knowledge Unlatched) that unify publisher workflows and streamline management operations.

If your CRIS is paid for by your Research Office, please consult with them over the value for money appraisal.

13.8 Figure 13g highlights that Pure was the most popular service for research management and was used at 31 responding institutions (40%), followed by Symplectic (23 respondents, 30%) and Worktribe (21 respondents, 27%). Overall, fourteen respondents indicated they used at least one 'other' service, and the detail is provided in Table 18 (page 76). Note that Converis was only rated by four respondents and has been omitted from the charts that follow, although full details are available in the Library Technology Landscape: Supplementary Tables document available on the SCONUL website.

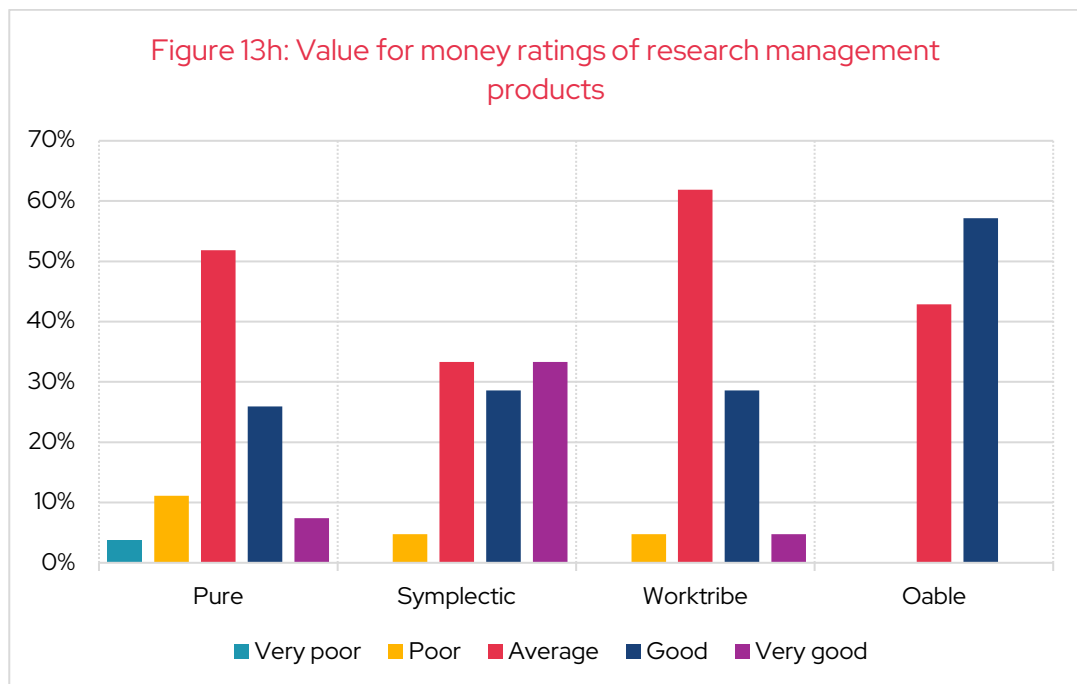


Percentages are based on 77 respondents indicating they used any of the products or services.

**Table 18: Other research support management solutions**  
(number of respondents in brackets)

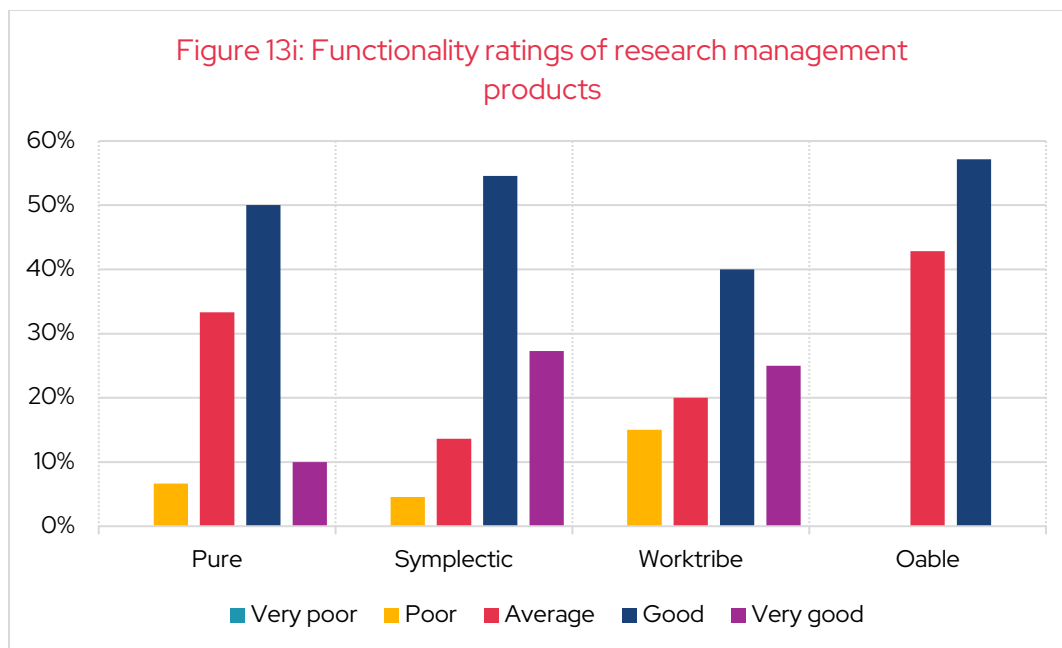
<ul style="list-style-type: none"> <li>• Haplo/Cayuse (4)</li> <li>• In-house (4)</li> <li>• Vidatum (2)</li> <li>• Blackdackel Research Costing Tool (1)</li> <li>• DataCite (1)</li> </ul>	<ul style="list-style-type: none"> <li>• DMP Online (1)</li> <li>• EPrints (1)</li> <li>• Ideate (1)</li> <li>• Infonetica Research Ethics System (1)</li> <li>• JIRA (1)</li> </ul>
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13.9 Figure 13h highlights that at least one-third of respondents considered each service to provide 'average' value for money – ranging from 33% for Symplectic to 62% for Worktribe. Following on from this, the proportion of respondents rating research management tools as 'good' or 'very good' value for money ranged from 33% for Pure and Worktribe to 62% for Symplectic, illustrating that there is room for improvement.

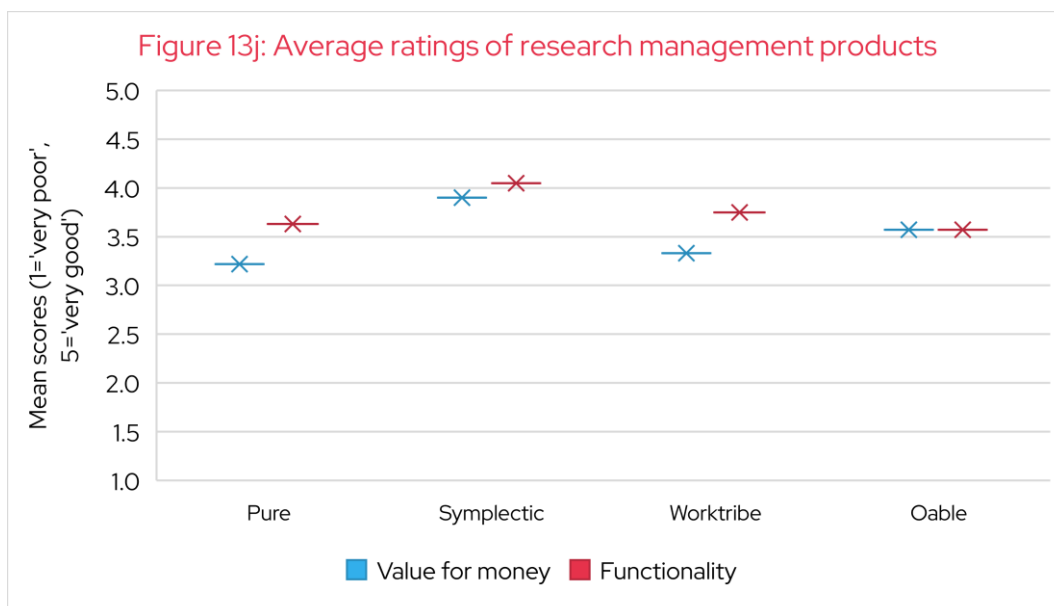


13.10 It is perhaps not surprising, that given the lower levels of satisfaction for value for money, Pure (60%), Symplectic (82%) and Worktribe (65%) all achieved a higher proportion of respondents rating their functionality as 'good' or 'very good' (Figure 13i, page 77). Compared to the value for money ratings, the proportion of

respondents indicating that these services provided 'average' functionality ranged from 13.6% for Symplectic to 43% for Oable.



13.11 Figure 13j displays the average ratings for value for money and functionality of research management products, with the generally lower value for money ratings for Pure, Symplectic and Worktribe clearly evident.



13.12 Several respondents included additional comments on research management solutions; however, these largely provided more detail on the use of the systems and the situation at individual institutions, with no common themes emerging.



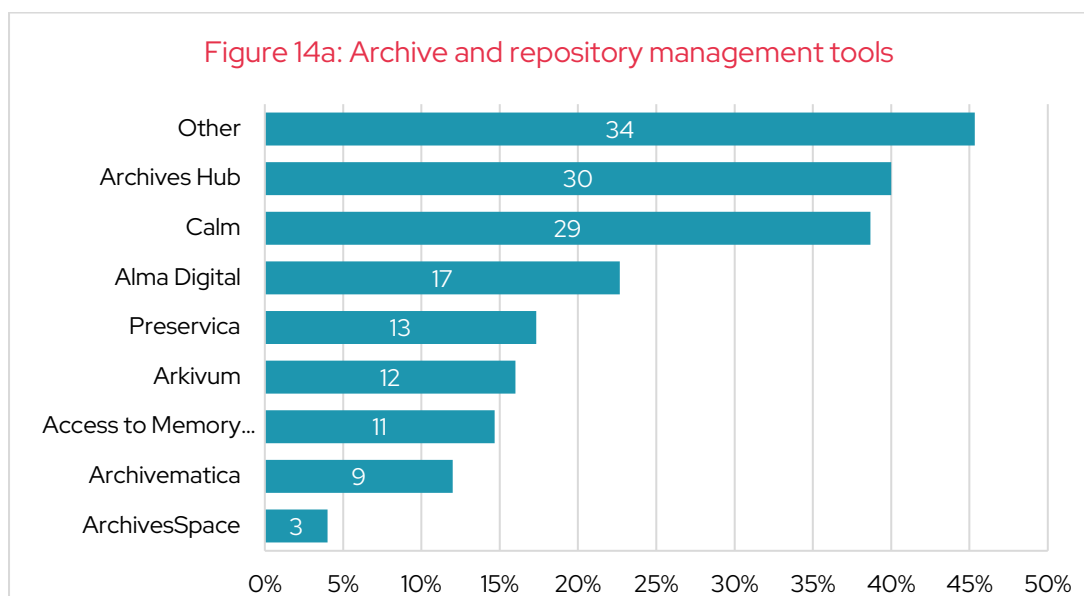
## 14. Archive management, digital repository and preservation solutions

Survey respondents were given the following guidance:

Please include:

- commercial (e.g Calm from Axiell,) and open source (e.g. ArchivesSpace) solutions designed to manage archive collections and museum objects
- digital repository solutions (e.g. for special collections) such as ContentDM (OCLC), Luna (Luna Imaging) and Rosetta (Ex Libris/Clarivate)
- digital preservation systems (e.g. open source Preservica)
- solutions such as Archives Hub (Jisc) that aggregate archive data.

14.1 Figure 14a illustrates that Archives Hub was the most popular archive management, digital repository and preservation solution and was used at 30 responding institutions (40%), closely followed by Calm which was used at 29 responding institutions (39%). Figure 8a (page 34) highlighted Alma’s dominance in library management systems and Figure 14a illustrates that Alma Digital was the third most used individual system (17 respondents, 23%). Notably, of the 75 respondents indicating they used these systems at their institution, 48 (64%) noted they used multiple solutions, with eight (10.7%) indicating they used five or more archive and repository management tools. Overall, 34 respondents indicated they used at least one ‘other’ solution, and the detail is provided in Table 19 (page 79). Notably, two respondents mentioned they had not been using Epexio for long and could not provide the value for money and functionality ratings; therefore, Epexio has not been included separately in Figures 14a-d.

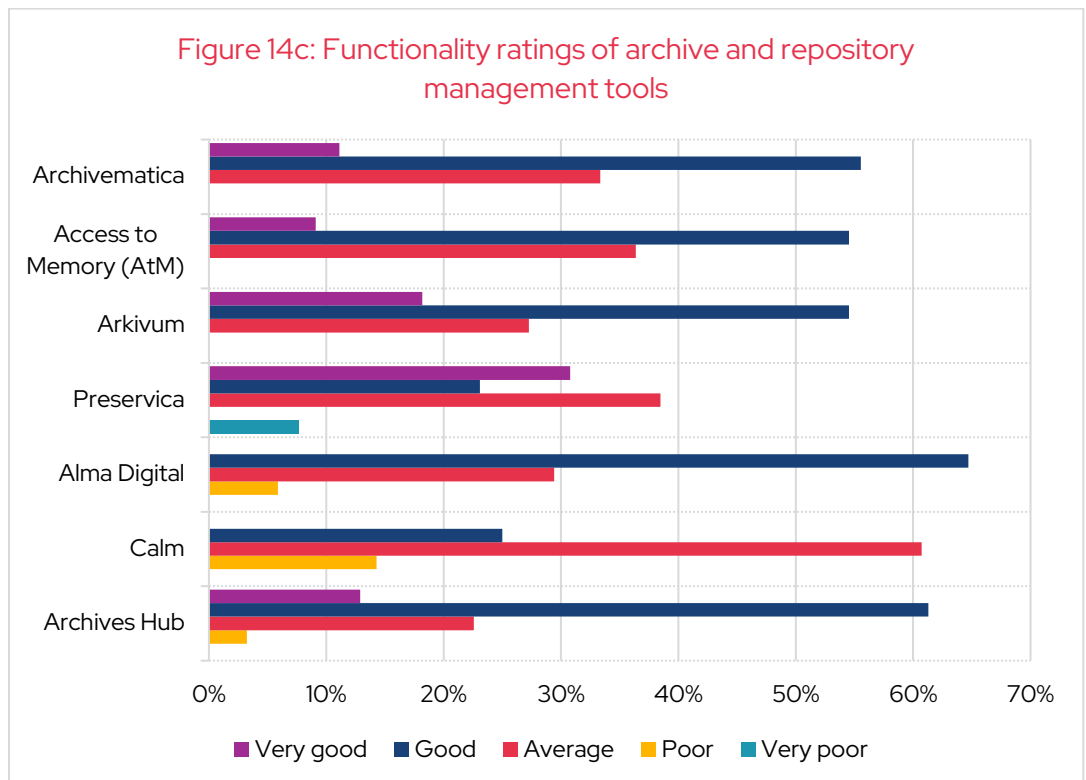
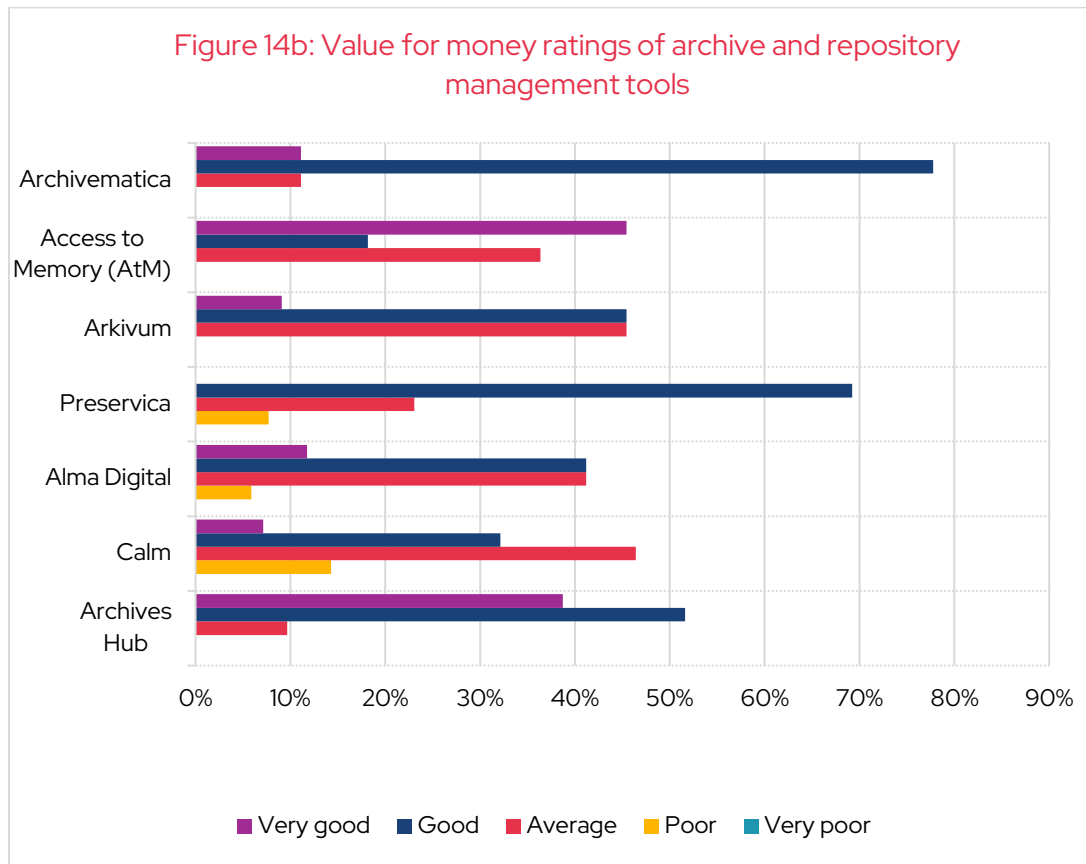


Percentages are based on 75 respondents indicating they used any of the products or services.

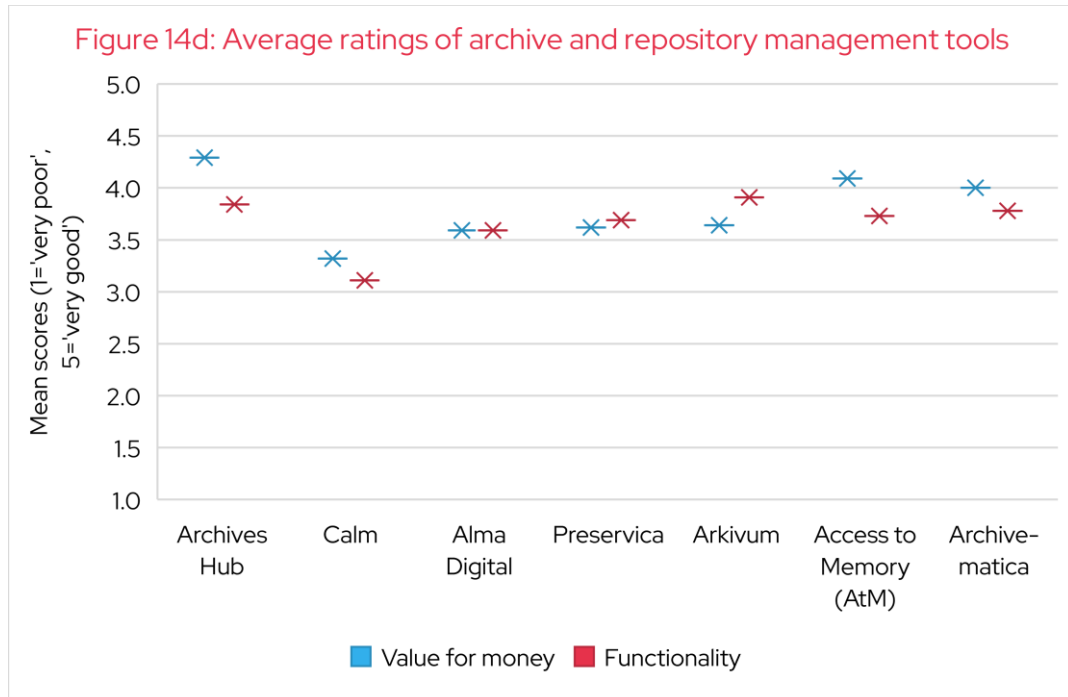
**Table 19: Other archive management, digital repository and preservation solutions**  
(number of respondents in brackets)

<ul style="list-style-type: none"> <li>• Epexio (6)</li> <li>• EMu (5)</li> <li>• Bespoke/in-house (4)</li> <li>• CONTENTdm (3)</li> <li>• Adlib (2)</li> <li>• AssetBank (2)</li> <li>• EPrints (2)</li> <li>• Modes (2)</li> <li>• Omeka (2)</li> <li>• Other (2)</li> <li>• SSL Archive Index+ (2)</li> <li>• Aim3 (1)</li> <li>• Axiell Collections (1)</li> <li>• Checksum (1)</li> <li>• Discover York (1)</li> <li>• Discovery (National Archives catalogue and aggregator) (1)</li> </ul>	<ul style="list-style-type: none"> <li>• Documentum (1)</li> <li>• DROID (1)</li> <li>• Fedora (1)</li> <li>• Internet Archive (1)</li> <li>• Islandora 7 (1)</li> <li>• LOCKSS (1)</li> <li>• Portfolio (1)</li> <li>• Portico (1)</li> <li>• Rosetta (1)</li> <li>• Samvera (1)</li> <li>• SharePoint (1)</li> <li>• Sierra/Encore (1)</li> <li>• The National Archives Discovery Service (1)</li> <li>• TNA Discovery (1)</li> <li>• Turning the Pages software (1)</li> <li>• VuFind (1)</li> </ul>
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- 14.2 Overall, the proportion of respondents rating the archive and repository management solutions as 'good' or 'very good' value for money ranges from 39% for Calm to 90% for Archives Hub (Figure 14b, page 80). ArchivesSpace has been omitted from Figures 14b-d as it was only rated by three responding institutions, all of which rated the service as 'good' or 'very good' for both value for money and functionality.
- 14.3 As with value for money, Calm rated relatively low for functionality with just one-quarter of respondents rating it as 'good' or 'very good' (Figure 14c, page 80), while 61% of respondents considered it to provide 'average' functionality. In contrast, the remaining solutions were rated positively by more than half of respondents, with almost three-quarters of respondents rating Archives Hub as 'good' or 'very good'.



14.4 This trend is highlighted further by Figure 14d which illustrates that Calm achieved the lowest average ratings for both value for money and functionality. In contrast, both Archives Hub and Access to Memory (AtM) achieved average ratings of more than 4.0 for value for money, indicating that respondents generally rated these systems positively, while none of the solutions achieved an average above 4.0 for functionality.



14.5 Several respondents noted their frustration with the lack of development with Calm:

*... Calm dropped the ball on development when it had a monopoly ...*

14.6 Whilst others noted that open-source products provided a good solution for archives management, but that obtaining full functionality requires knowledgeable staff with the time to make full use of it:

*... Open source systems offer greater customisation and regular improvement, but require the employ of dedicated specialist staff to make the most of the system ... Open source systems offer greater customisation.*

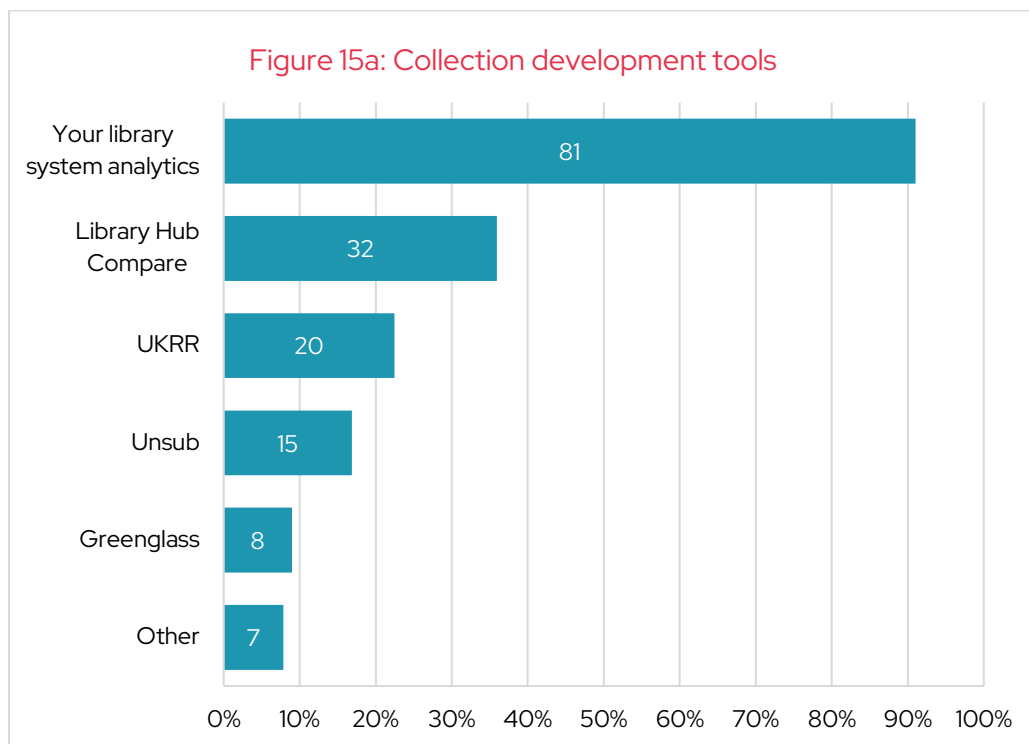
## 15. Collection development

Survey respondents were given the following guidance:

Please include collection analytics tools within a library system as well as:

- Jisc Library Hub Compare (which allows a library to use Library Hub data to benchmark monograph and serials collections against those of other libraries)
- UK Research Reserve (UKRR) (which allows libraries to de-duplicate their journal holdings)
- GreenGlass and Choreo Insights (collection management tools from OCLC)
- tools such as Unsub (OurResearch) and CloudSource OA (SirsiDynix).

15.1 Figure 15a highlights that just over 90% of respondents indicated they used their library systems analytics tool for collection development, while just over one-third noted they used Library Hub Compare, 20 (22%) used UK Research Reserve (UKRR) and eight (9.0%) used GreenGlass. Overall, 21 respondents noted they used at least one 'other' system, with fifteen indicating that they used Unsub and this is reflected in the charts that follow. Details on the other systems used at responding institutions is provided in Table 20 (page 83).



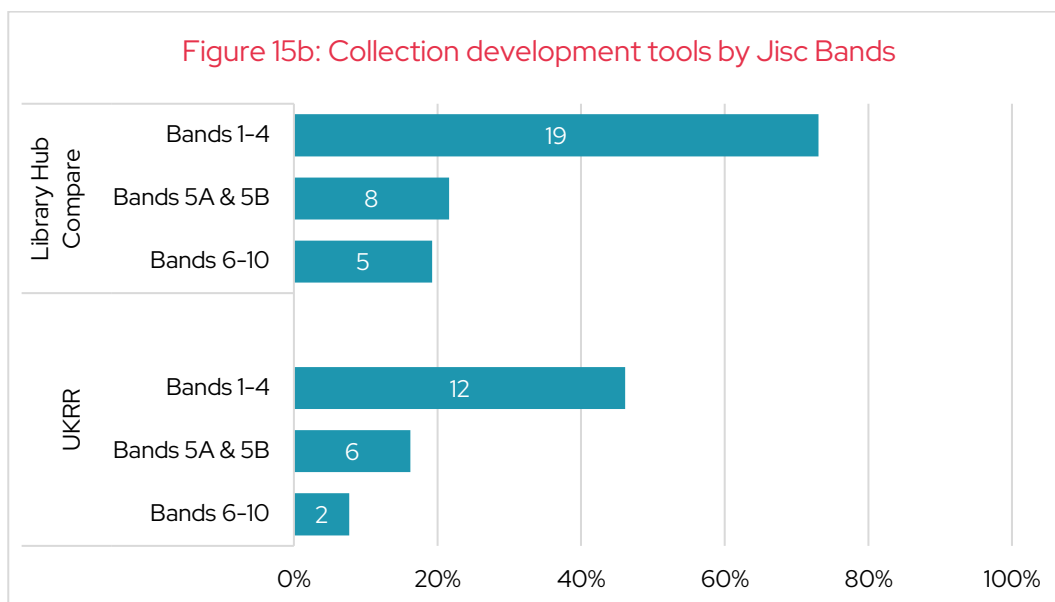
Percentages are based on 89 respondents indicating they used any of the products or services.

**Table 20: Other collection development tools**

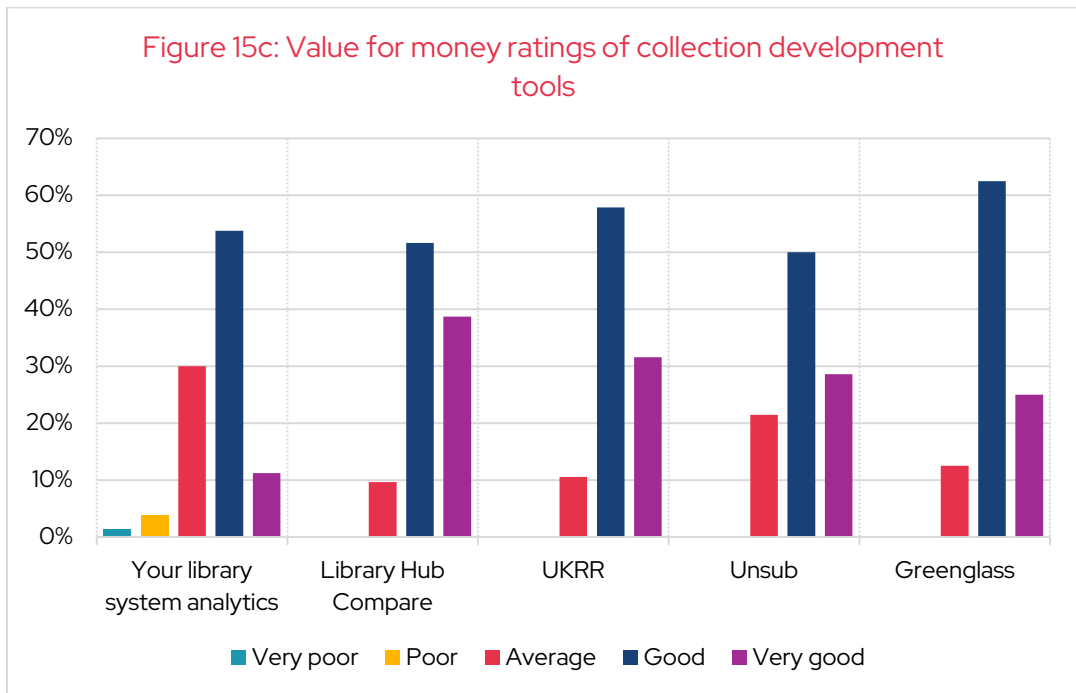
(number of respondents in brackets)

- |  |   |
|--|---|
| <ul style="list-style-type: none"> <li>• 360Core (1)</li> <li>• Collection HQ Academic (1)</li> <li>• ElasticSearch (1)</li> </ul> | <ul style="list-style-type: none"> <li>• Esploro (1)</li> <li>• Power Bi (1)</li> <li>• WorldCat (1)</li> </ul> |
|--|---|

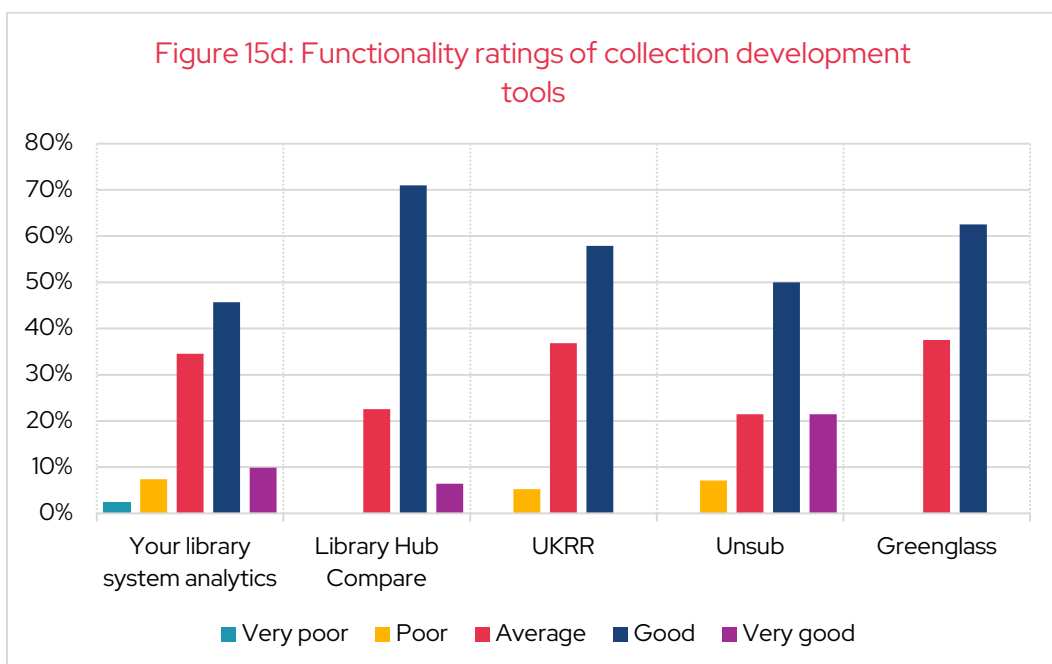
15.2 There were statistically significant differences between Jisc bands, with Figure 15b illustrating that responding institutions in Jisc bands 1-4 are more likely to use UKRR than those in bands 6-10, while responding institutions in bands 1-4 are more likely to use Library Hub Compare than those in Bands 5-10.



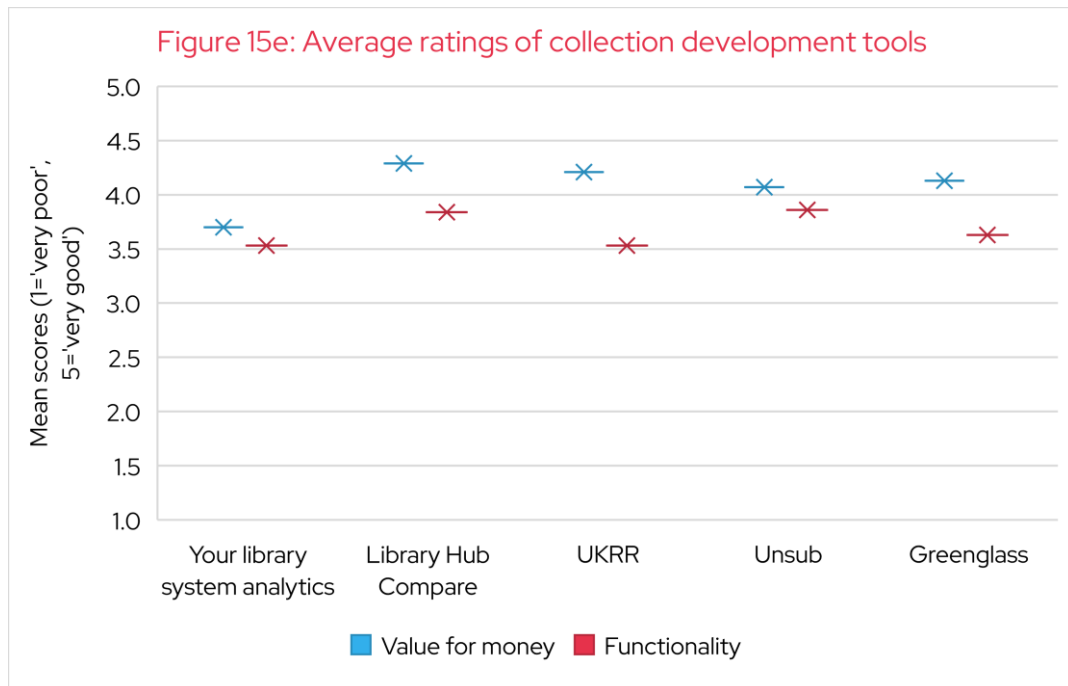
15.3 Figure 15c (page 84) displays the value for money ratings of collection development tools and illustrates that the individual systems all performed relatively well, with more than three-quarters of respondents considering them to offer 'good' or 'very good' value for money. Around two-thirds of respondents using their library system analytics for collection development rated them positively for value for money; however, it was the only solution to be rated as 'poor' or 'very poor' by any respondents. Of the respondents rating the analytics module of their library system, 54 previously indicated their library management system was Alma, and almost 70% considered its analytics module to provide 'good' or 'very good' value for money.



15.4 When we consider the functionality ratings of collection development tools (Figure 15d), we see a slightly different picture with the proportion of respondents rating the individual systems positively ranging from 58% for UKRR to 77% for Library Hub Compare. As previously mentioned, the ratings from those respondents using their library system analytics for collection development will cover more than one solution, and of the 54 previously indicating their library management system was Alma, 65% considered its analytics module to provide 'good' or 'very good' functionality.



15.5 The variances between the ratings are highlighted by Figure 15e, with all solutions scoring higher, on average, for value for money than for functionality. Library Hub Compare, UKRR, Unsub and GreenGlass all achieved average ratings above 4.0 for value for money, indicating that respondents generally rated these systems positively, while, in contrast, none of the systems recorded an average rating above 4.0 for functionality. It should be noted that it is not clear which of the services incur additional costs, and this could impact on the average ratings displayed in Figure 15e.



15.6 Several respondents included additional comments on collection development tools; however, these largely provided more detail on the use of the solutions and the situation at individual institutions, with no common themes emerging.



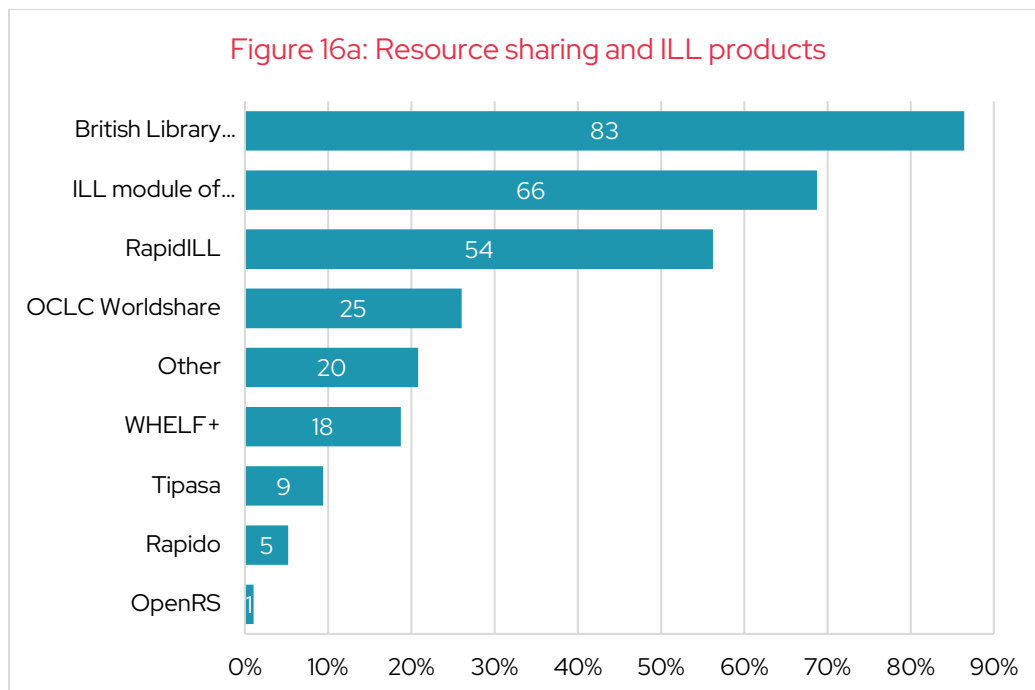
## 16. Resource sharing and ILL

Survey respondents were given the following guidance:

Please include:

- the use of an ILL module within your library system as well as separate 'add on' ILL solutions
- peer to peer services using ISO ILL functionality built into the library system
- peer to peer resource sharing solutions such as RapidILL, Tipasa, ReShare etc.
- British Library (BLDSS) service
- services such as Reprints Desk
- brokering solutions such as (Ex Libris/Clarivate) Rapido that allows users to select the best delivery solution from a range of options.

16.1 The British Library (BLDSS) was the most popular system for resource sharing and ILL and was used at 86% of responding institutions (Figure 16a), followed by ILL modules of the library system (66 respondents, 69%) and RapidILL (54 respondents, 56%). Overall, 20 respondents indicated they use at least one 'other' resource sharing or ILL product or service and the detail is provided in Table 21 (page 87).



Percentages are based on 96 respondents indicating they used any of the products or services.

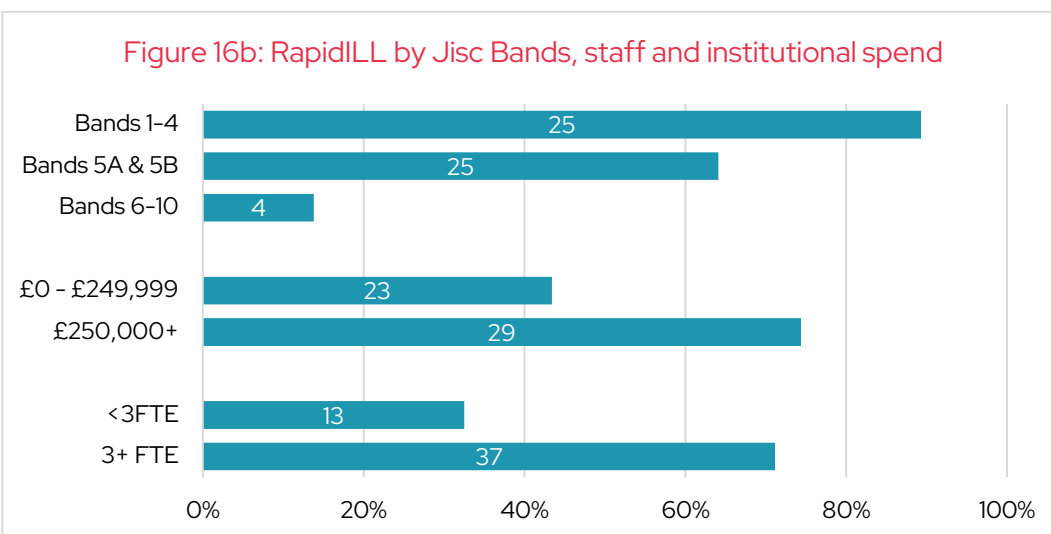
**Table 21: Other resource sharing and ILL products and services**

(number of respondents in brackets)

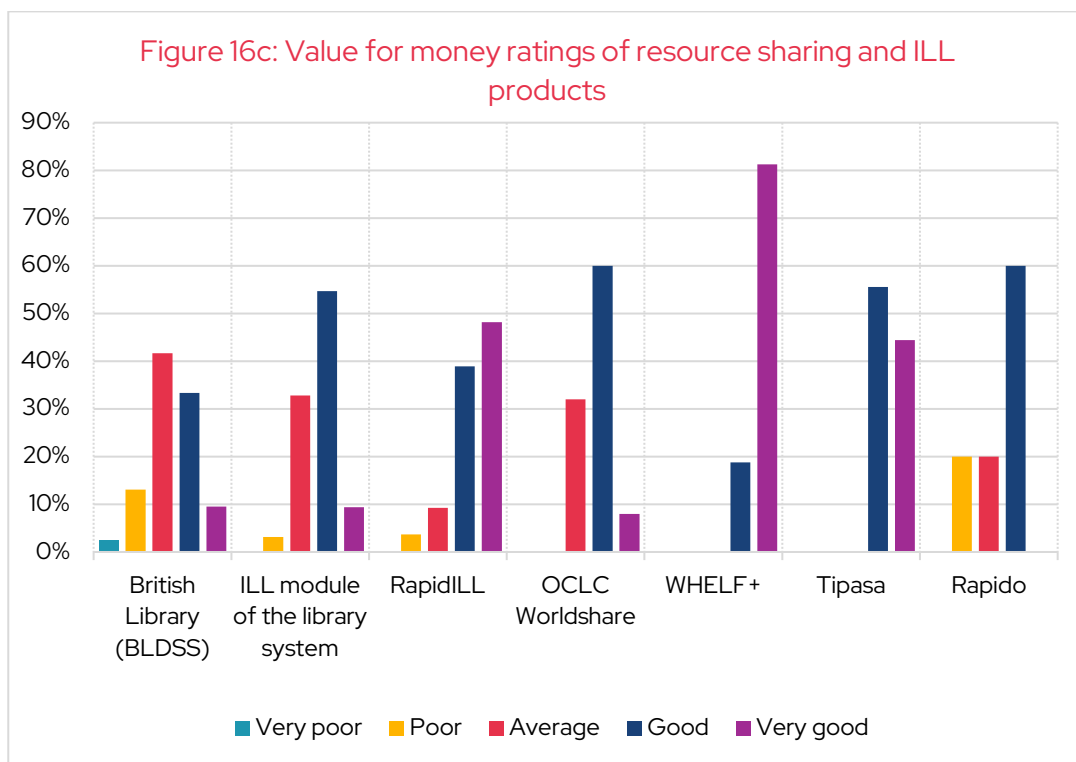
<ul style="list-style-type: none"> <li>• Subito (5)</li> <li>• Clio (3)</li> <li>• Direct contact with/from other institutions (3)</li> <li>• IFLA (2)</li> <li>• NULJ (2)</li> <li>• Article Galaxy (1)</li> </ul>	<ul style="list-style-type: none"> <li>• Bespoke/in-house (1)</li> <li>• Health Journals Network Ireland (HJNI) (1)</li> <li>• MS Forms (1)</li> <li>• Reprints Desk (1)</li> <li>• RSCVD (1)</li> </ul>
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16.2 There were statistically significant differences and Figure 16b illustrates that responding institutions in Jisc bands 1-5 are more likely to use RapidILL than those in bands 6-10. Additionally, responding institutions with more than three FTE staff devoted to the support of library technology are also more likely to use RapidILL along with those respondents from institutions estimated to spend £250,000 or more on technology to support library services and functions.

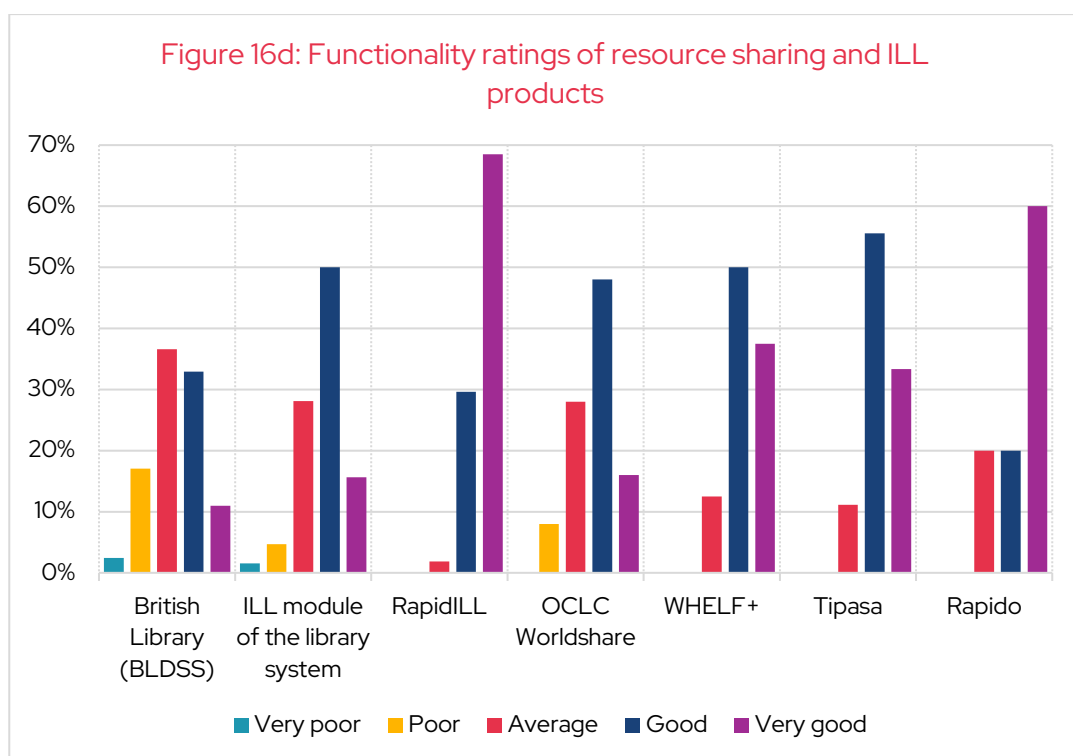
**Figure 16b: RapidILL by Jisc Bands, staff and institutional spend**



16.3 Figure 16c (page 88) illustrates that all sixteen respondents rating WHELP+ for value for money, rated it as 'good' or 'very good', while the nine respondents using Tipasa also rated it positively, noting that there is no additional charge for the WHELP+ service. Elsewhere, the proportion of respondents rating the systems as 'good' or 'very good' value for money ranged from 43% for the British Library (BLDSS) to 87% for RapidILL. Of the respondents rating the ILL module of their library system, 46 previously indicated their library management system was Alma, and around two-thirds considered its ILL module to provide 'good' or 'very good' value for money. However, it should be noted that it is not always clear which services incur an additional cost, and those that are either free or included within other systems.

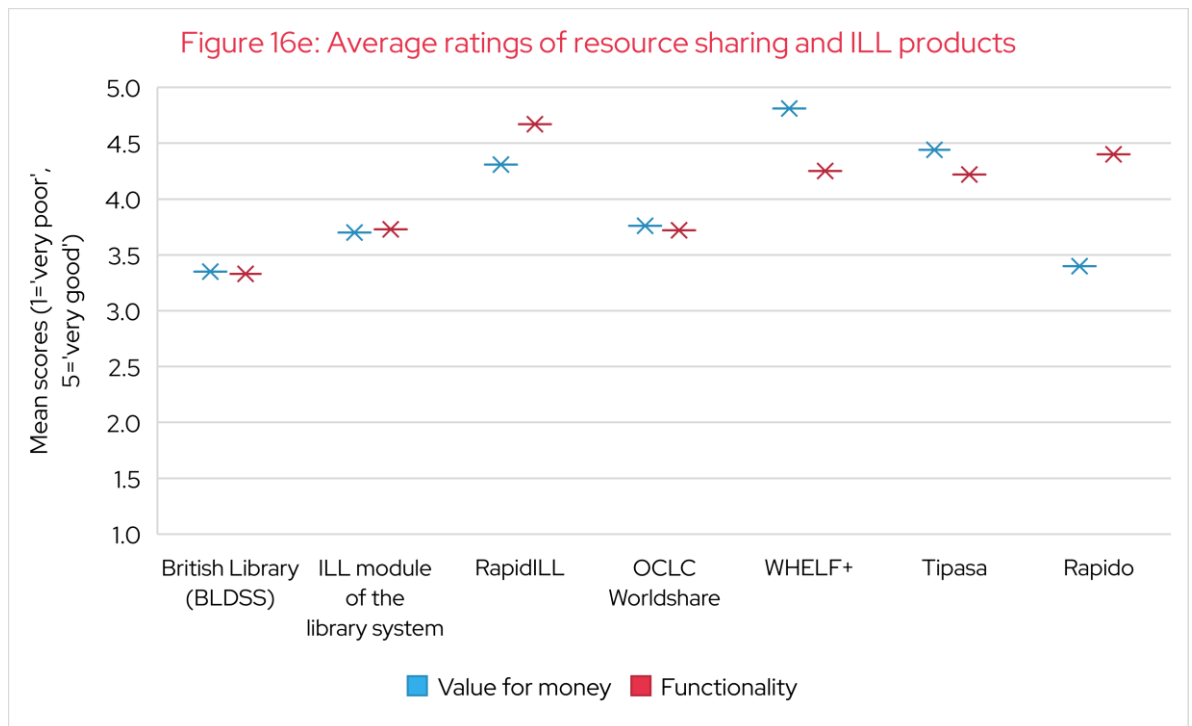


16.4 A similar picture emerges when we consider functionality (Figure 16d), with the proportion of respondents rating the service as 'good' or 'very good' ranging from 44% for the British Library (BLDSS) to 98% for RapidILL – higher than the 87% rating it positively for value for money.



16.5 Figure 16e highlights that RapidILL, WHELP+ and Tipasa all achieved average ratings above 4.0 for both value for money and functionality, indicating that respondents generally rated these systems positively. Rapido also obtained an average above 4.0 for functionality, compared to an average rating of 3.4 for value for money; however, it should be noted that just five respondents rated the system. Notably, the British Library (BLDSS) has scored relatively low for both value for money and functionality; however, several respondents mentioned the cyber-attack of October 2023, with some indicating that their ratings are based on the level of service before this event, while others have noted that the cyber-attack has impacted on their ratings:

*Use of BL this year (23/24) has been minimal due to cyber-attack - full functionality still not reinstated and reflected in scoring ...*



16.6 Additionally, several respondents have mentioned the improvement of their service as a result of implementing RapidILL:

*RapidILL has been a game-changer for us: simple to use, effective and saves a great deal of staff time ...*

16.7 Others maintained that the ILL market is dominated by one or two suppliers, whilst some think that the COVID-19 pandemic, along with the cyberattack at the British Library, has improved the situation:

*... The recent cyber-attack on the British Library, on which the sector has been historically over-reliant, strengthened the position of alternative suppliers, especially where they are more cost-effective and provide a better service ...*

16.8 Although, others expressed concerns with the costs of resource sharing and ILL services:

*Entry cost of systems for ILL can be an issue for institutions with small numbers of ILLs ...*

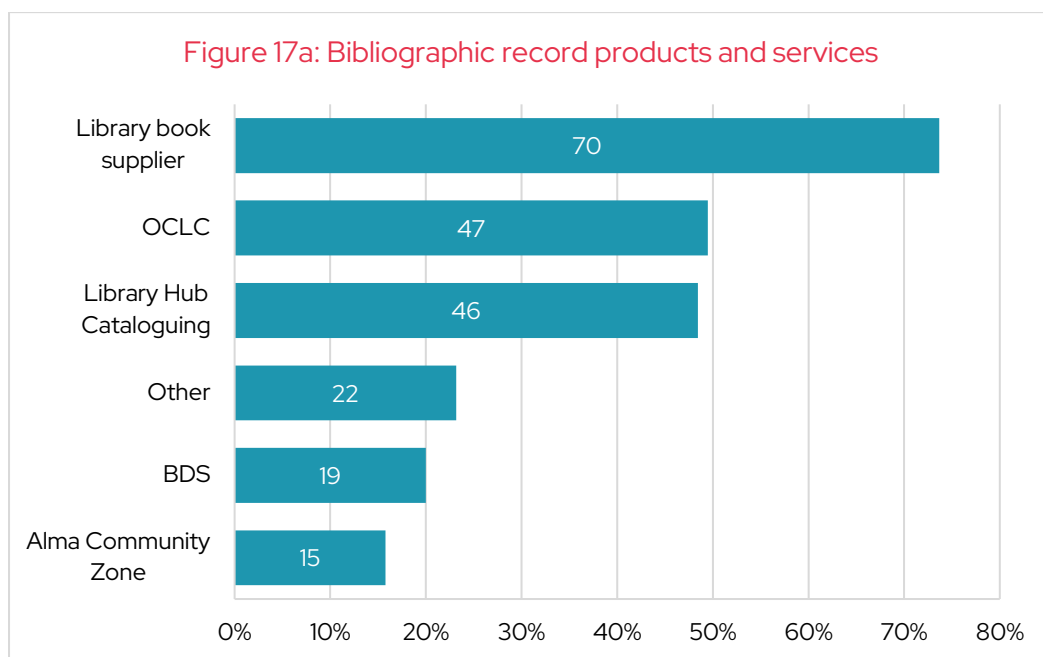
## 17. Bibliographic record creation and supply

Survey respondents were given the following guidance:

Please include:

- record download services such as the ESS library system 'Base' service, SkyRiver (Innovative Interfaces/Clarivate), OCLC, BDS, Library of Congress, Library Hub Cataloguing (Jisc) etc.
- catalogue record provision as part of the acquisitions process via library suppliers such as Askews, EBSCO or ProQuest.

17.1 Almost three-quarters of respondents use a library book supplier for bibliographic record creation and supply (Figure 17a), while 47 respondents (49%) indicated they used OCLC and 46 (48%) reported using Library Hub Cataloguing for this service. Notably three-quarters of respondents indicated that they used multiple bibliographic record services, with fourteen (14.7%) indicating they used four or more different services. Overall, 33 respondents noted they use at least one 'other' service, with fifteen (16%) indicating they used Alma Community Zone and this is reflected in the charts that follow. Details on the other services used at responding institutions are listed in Table 22 (page 92). Only five respondents noting they used information supplied direct from publishers or suppliers rated the services for value for money and functionality and they have not been included separately in the charts that follow.

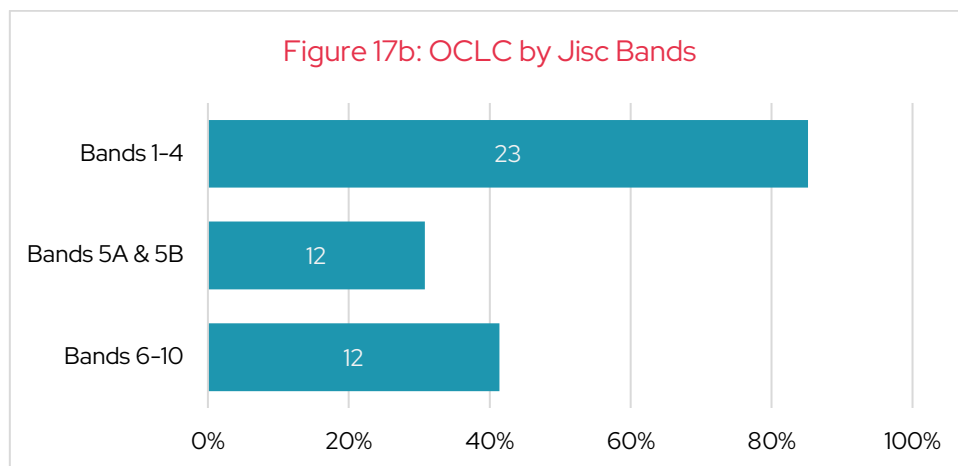


Percentages are based on 95 respondents indicating they used any of the products or services.

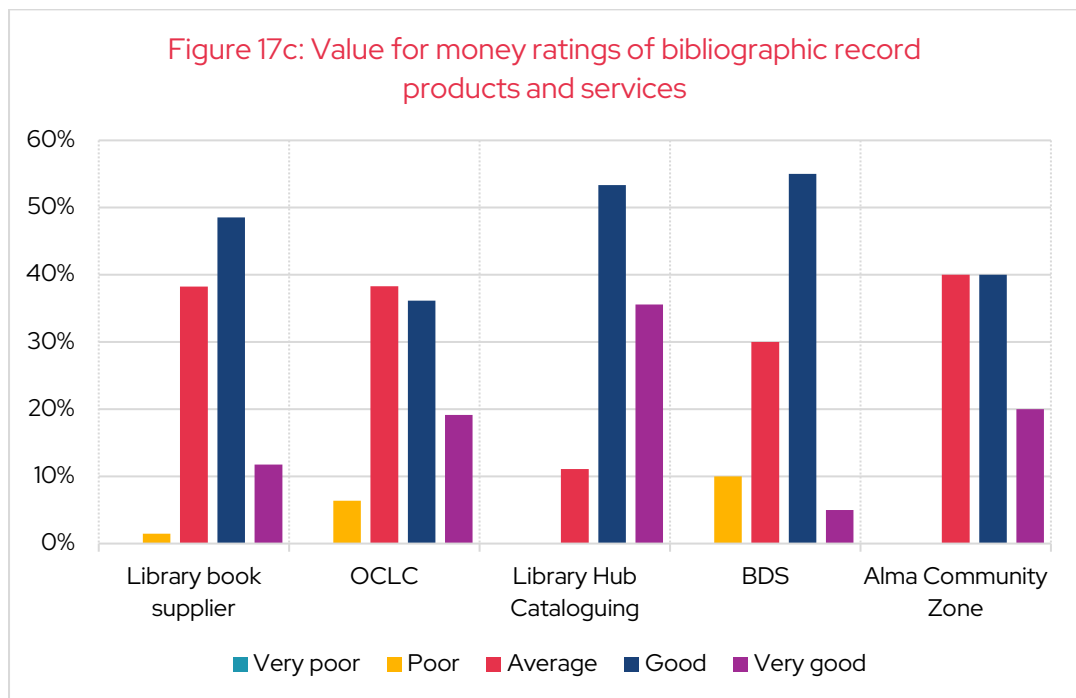
**Table 22: Other bibliographic record creation and supply products and services**  
(number of respondents in brackets)

<ul style="list-style-type: none"> <li>• Direct from publisher/supplier (6)</li> <li>• Library of Congress (5)</li> <li>• British Library (4)</li> <li>• ProQuest/Clarivate (2)</li> <li>• BNB (1)</li> <li>• Casalini (1)</li> <li>• EBSCO GOBI ebooks (1)</li> <li>• ESS (1)</li> <li>• In-house (1)</li> </ul>	<ul style="list-style-type: none"> <li>• LMS Community Zone (1)</li> <li>• loc 2 (1)</li> <li>• MarcEdit (1)</li> <li>• National Libraries (1)</li> <li>• NBK (1)</li> <li>• Talis (1)</li> <li>• Trinity College Dublin (1)</li> <li>• Watson (1)</li> <li>• WebDewey only (OCLC) (1)</li> </ul>
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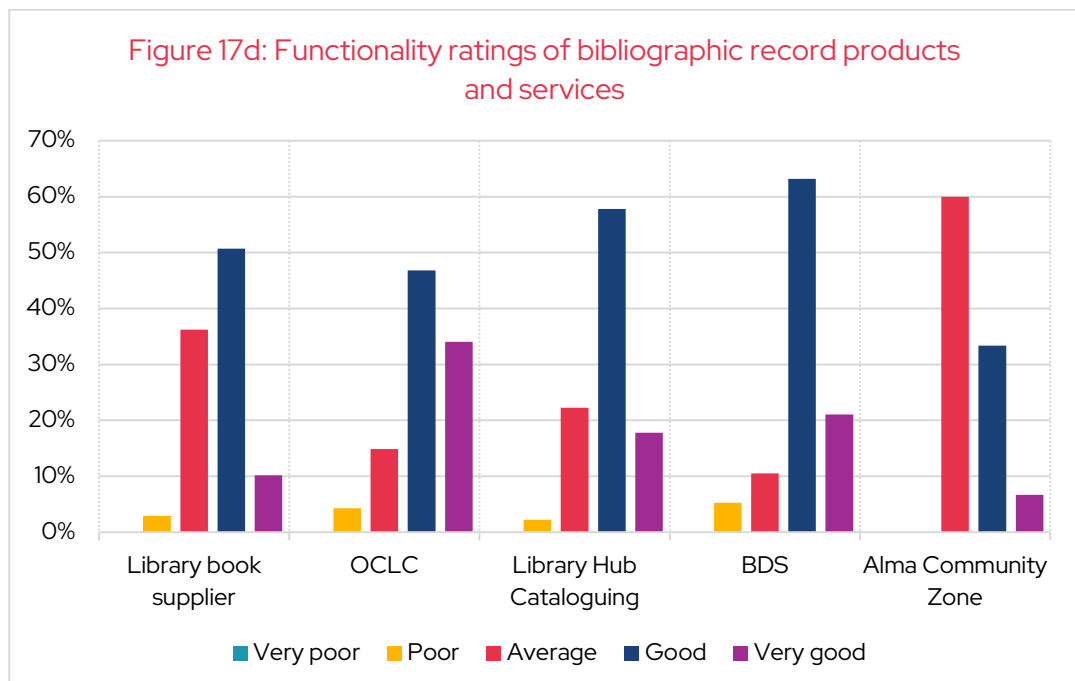
17.2 There are statistically significant differences, with Figure 17b highlighting that responding institutions in Jisc bands 1-4 are more likely to use OCLC than those in bands 5-10.



17.3 Figure 17c (page 93) displays the value for money ratings of bibliographic record creation and supply services and highlights that Library Hub Cataloguing has the highest positive rating, with almost 90% of respondents considering it to offer 'good' or 'very good' value for money. The other services are some way behind with the proportion of respondents rating them positively ranging from 55% for OCLC to 60% for Alma Community Zone, BDS and library book suppliers, although it should be noted that the ratings for the latter will include several different suppliers.

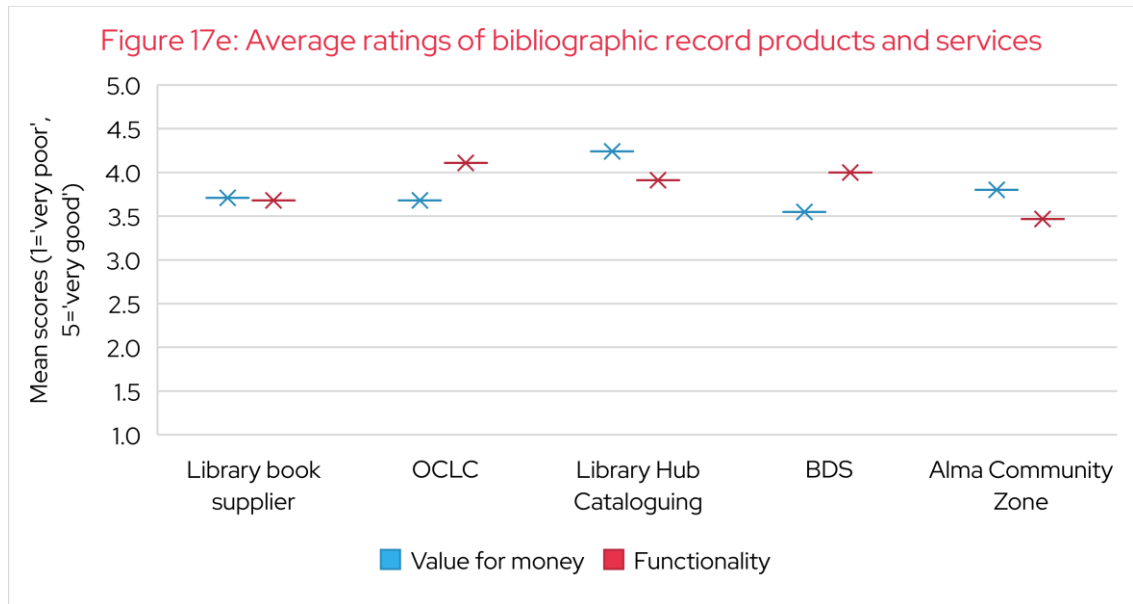


17.4 A similar picture emerges when we consider the functionality ratings for library book suppliers (Figure 17d), while both OCLC and BDS perform better for functionality with more than 80% of respondents rating these services as 'good' or 'very good'. In contrast, both Library Hub Cataloguing (76%) and Alma Community Zone (40%) achieve lower positive ratings for functionality than for value for money.





17.5 This is highlighted further by Figure 17e, which illustrates that OCLC and BDS achieved higher ratings, on average, for functionality than for value for money, while the reverse is true for Library Hub Cataloguing and Alma Community Zone. Notably, only OCLC (functionality) and Library Hub Cataloguing (value for money) achieved average ratings above 4.0, indicating that respondents generally rated the systems positively.



17.6 Respondents largely expressed their concern with the quality of the records received, and the differences between suppliers with no standardisation:

*... Records supplied by vendors vary widely in quality/accuracy and cannot be relied upon without mediation/checking. We need to balance quality and cost.*

17.7 A couple of respondents also raised concerns regarding the apparent dominance of OCLC and the increasing costs and restrictions as a result:

*... OCLC seem to dominate the market currently, and we are concerned about restrictions on reuse of OCLC records, e.g. they cannot be used in Library Hub Cataloguing ...*

17.8 Additionally, several respondents mentioned their disappointment with the end of the OCLC and Jisc deal:

*... We were disappointed that Jisc and OCLC could not continue to develop and offer a shared service.*

## 18. Analytics and management information

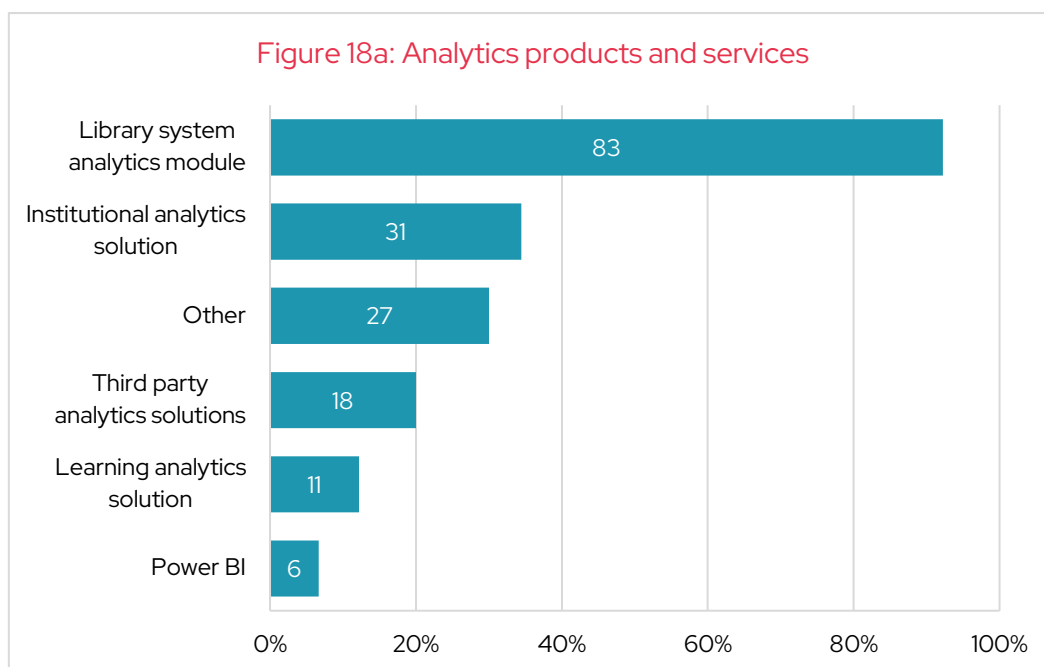
Survey respondents were given the following guidance:

Please include:

- management information and analytics capabilities provided as part of the library system
- third party solutions such as Tableau that are used to analyse library data
- institutional business information/analytics solutions such as e.g. MS Power BI or Qlik that pull in library data and mix it with other institutional data
- learning analytics solutions that ingest library data such as Civitas Learning and Jisc Learning Analytics.

Please include the name of the product for library management system and third party vendors in the text box below.

18.1 Figure 18a highlights that more than 90% of respondents use their library systems analytics module, while around one-third use their institutional analytics solution and one-fifth use third party analytics solutions. Overall, thirty respondents indicated they used at least one 'other' system including six noting they used Power BI and this is reflected in the charts that follow. Details of other systems used at responding institutions are provided in Table 23 (page 96).



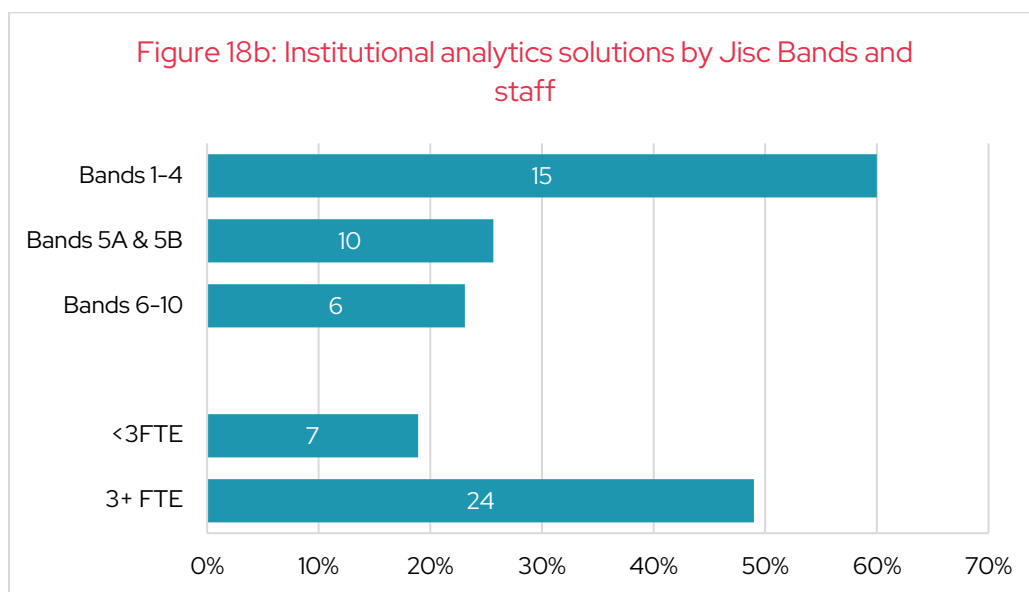
Percentages are based on 90 respondents indicating they used any of the products or services.

**Table 23: Other analytics and management information systems**

(number of respondents in brackets)

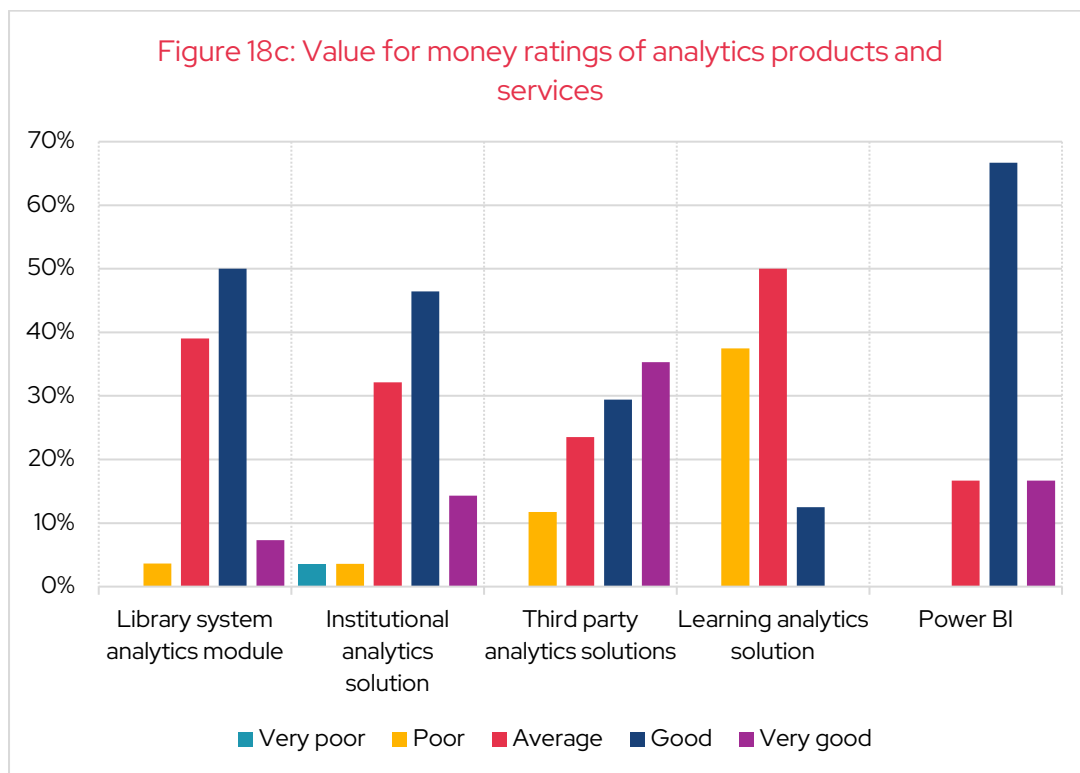
- |  |   |
|--|---|
| <ul style="list-style-type: none"> <li>• JUSP (4)</li> <li>• Tableau (2)</li> <li>• Celus (1)</li> <li>• Civitas (1)</li> <li>• EZproxy (1)</li> <li>• Google analytics (1)</li> <li>• Grafana (1)</li> <li>• HeidiSQL (1)</li> <li>• HoxtonAI 'Control Room' (1)</li> <li>• Koha (1)</li> </ul> | <ul style="list-style-type: none"> <li>• Kortext analytics (1)</li> <li>• LibInsights (1)</li> <li>• MARCedit (1)</li> <li>• Metabase (1)</li> <li>• Microsoft (1)</li> <li>• OPN Buildings (1)</li> <li>• Prenax Libmetrix (1)</li> <li>• QlikView (1)</li> <li>• Sierra LMS (1)</li> <li>• Unsub (1)</li> </ul> |
|--|---|

18.2 Figure 18b illustrates that there are statistically significant differences with responding institutions in Jisc bands 1-4 more likely to use their institutional analytics solutions than those respondents in bands 5-10. Additionally, responding institutions with three or more FTE staff devoted to supporting library technology are also more likely to use their institutional analytics solution than respondents with fewer than three FTE staff.

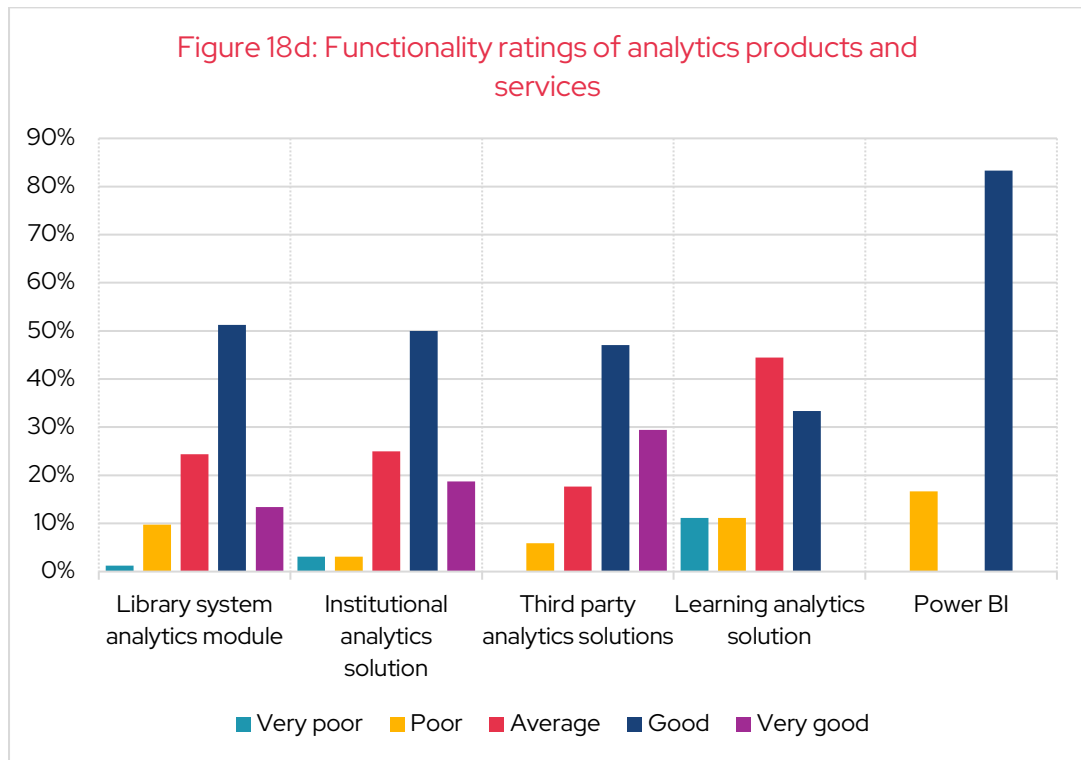


18.3 Overall, the proportion of respondents considering each service to offer 'good' or 'very good' value for money ranged from just 12.5% for learning analytics solutions to 83% for Power BI (Figure 18c, page 97), with the latter based on just six respondents. Notably, of the 83 respondents rating their library systems analytics

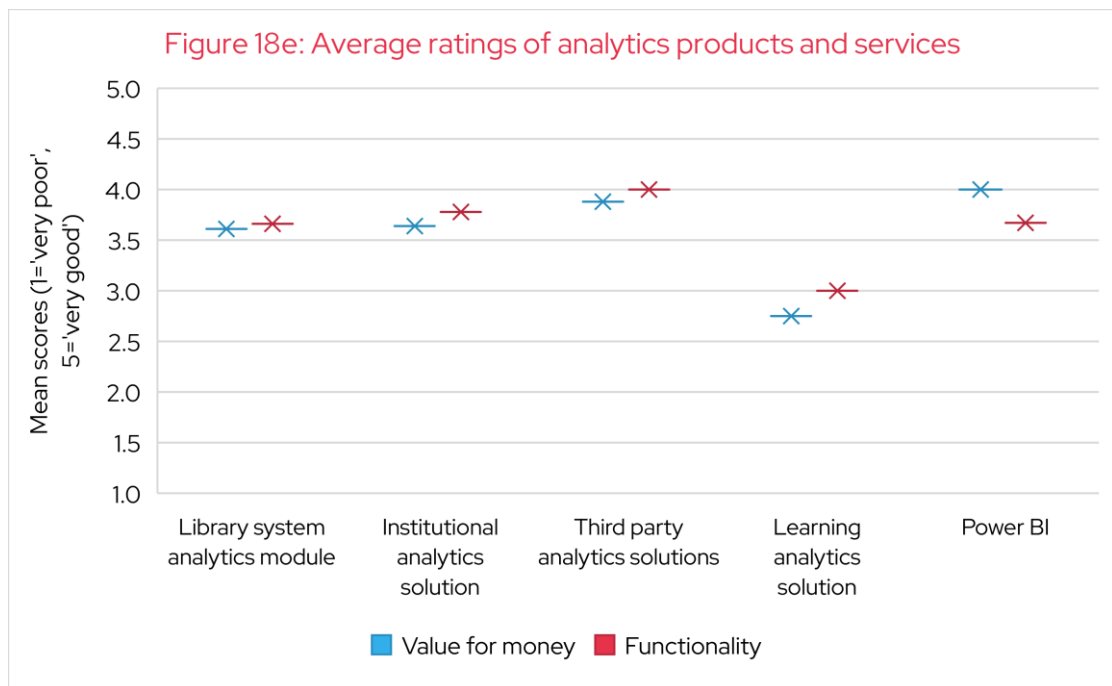
module, 60 previously indicated that they used Alma, with 58% considering the analytics module to provide 'good' or 'very good' value for money.



18.4 Figure 18d (page 98) displays the functionality ratings for analytics tools used at responding institutions. The services all generally achieve slightly higher satisfaction levels for functionality than for value for money, except for Power BI which records a similar proportion of respondents rating them positively for both, despite one respondent considering it to provide 'poor' functionality. Overall, the proportion of respondents considering the services to offer 'good' or 'very good' functionality ranging from 33% for learning analytics solutions to 83% for Power BI. Of the 83 respondents rating their library systems analytics module, 60 previously indicated that they used Alma, with 72% considering the analytics module to provide above average functionality.



18.5 Figure 18e confirms this trend with all services achieving slightly higher average ratings for functionality than for value for money, except for Power BI; however, it should be noted that the majority of these averages are all likely to cover several different systems.



- 18.6 The additional detail provided by respondents largely highlighted that several analytics tools are required:

*I don't think any one analytics package can ever deliver everything that all users want ...*

- 18.7 Additionally, several respondents mentioned issues obtaining the required information, for example with regards to e-resources:

*... a big issue for us is the system does not allow us to accurately compare our subscribed collections of ebooks and journals on a title basis ...*

- 18.8 While others mentioned that some of the analytics tools are complicated to use and often require additional knowledge:

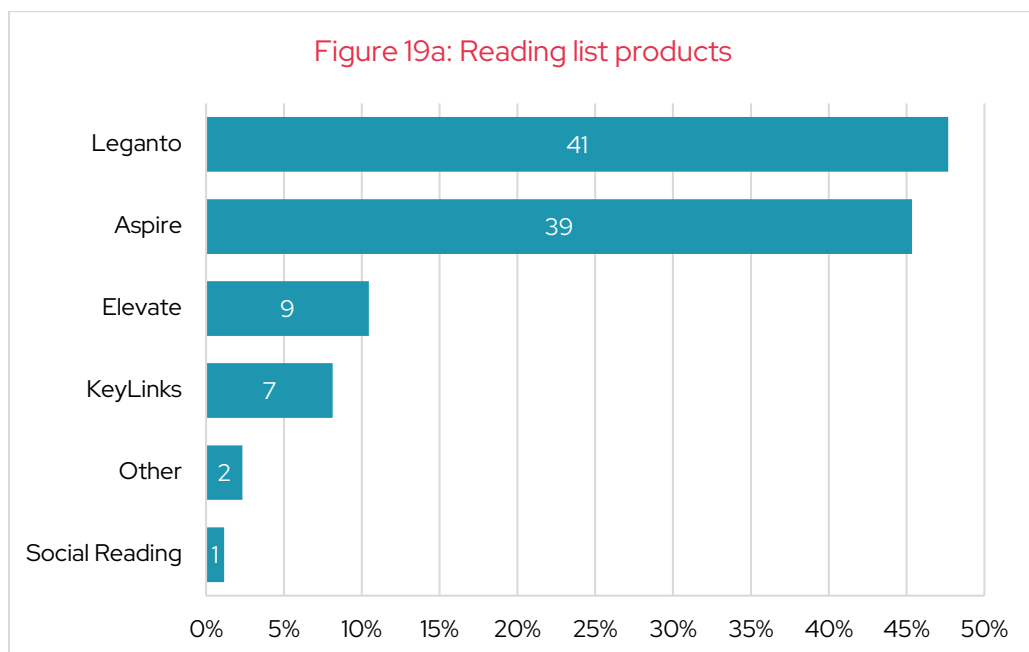
*... analytics module is very powerful, but requires skills to exploit it - raw SQL skills are required to fully exploit the module ...*

## 19. Resource/reading list solutions

Survey respondents were given the following guidance:

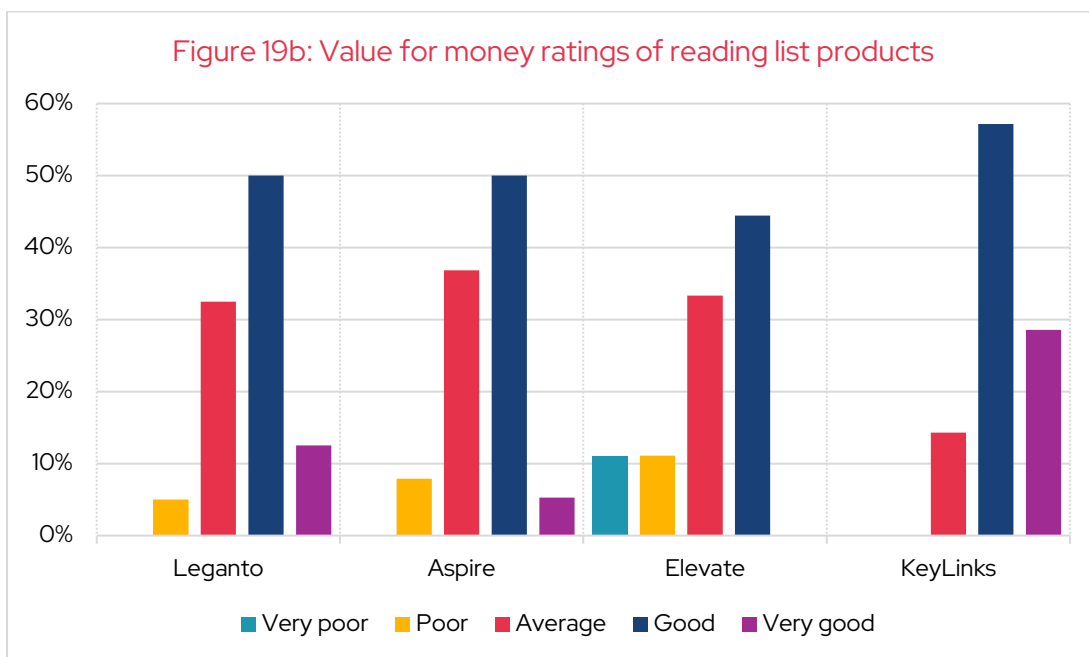
Please include reading/resource lists include Aspire (Talis/Sage), KeyLinks (Kortext), Leganto (Ex Libris/Clarivate), as well as related solutions such as Talis Elevate or Social Reading (Ex Libris/Clarivate) for student and academic engagement with texts (annotations, comments etc.).

19.1 Figure 19a illustrates that 41 respondents (48%) indicated they used Leganto for reading lists, while 39 (45%) reported they use Aspire, nine (10.5%) use Elevate and KeyLinks was used at seven responding institutions (8.1%). Just one respondent (1.2%) indicated that they used Social Reading and this has been omitted from the charts that follow. Overall, two respondents noted they used 'other' reading list solutions and these were CLA's Digital Content Store and StoryGraph.

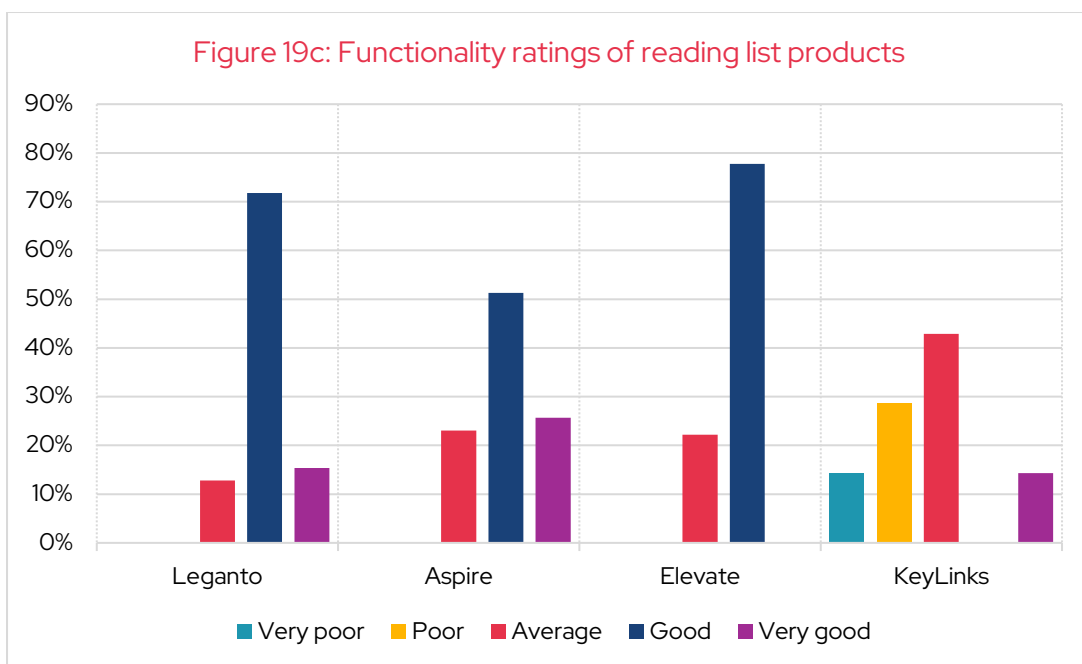


Percentages are based on 86 respondents indicating they used any of the products or services.

19.2 Figure 19b (page 101) illustrates that the two most popular systems, Leganto and Aspire, achieve a similar distribution of value for money ratings overall; however, Leganto (63%) does record a higher proportion of respondents considering the service to offer 'good' or 'very good' value for money than Aspire (55%). KeyLinks achieved the highest satisfaction levels, with 86% of respondents rating the service positively for value for money, noting that just seven respondents rated this service.

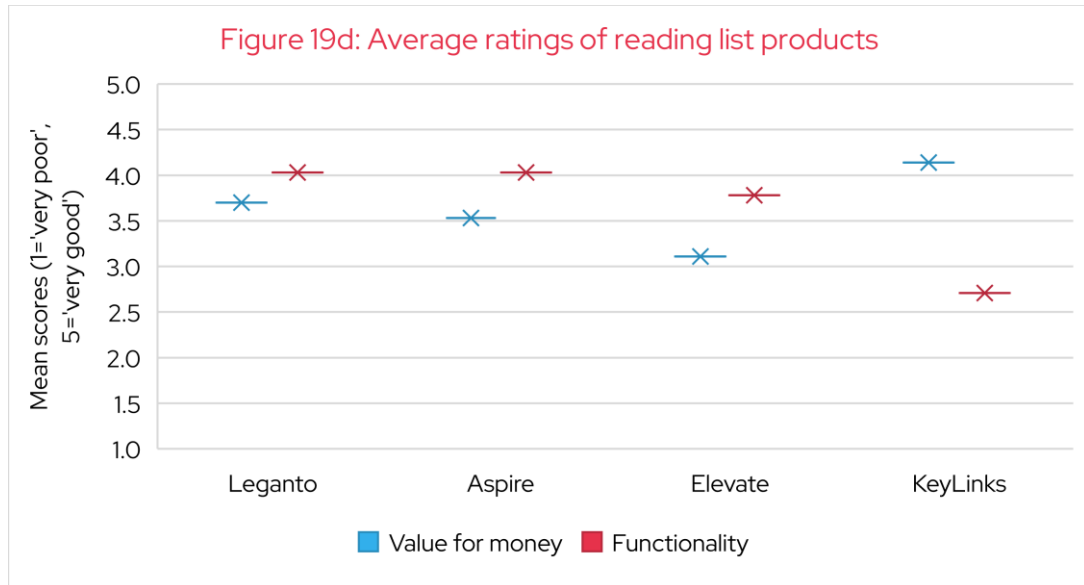


19.3 All of the solutions, except for KeyLinks, record higher levels of satisfaction for functionality than for value for money (Figure 19c), with the proportion of respondents rating the functionality of these systems as 'good' or 'very good' ranging from 77% for Aspire to 87% for Leganto. Additionally, no respondents consider Leganto, Aspire or Elevate to offer below average functionality. In contrast, just one respondent considered Keylinks to provide above average functionality; however, it should be noted that just seven respondents rated it overall.





19.4 Figure 19d further highlights the variance between the value for money and functionality ratings for KeyLinks, which achieved both the highest average rating for value for money and the lowest average functionality rating; however, the system was rated by just seven respondents. Figure 19d also highlights that Leganto, Aspire and Elevate all achieved higher average ratings for functionality than for value for money.



19.5 The additional comments provided by respondents largely focussed on the situation at individual institutions; however, several did express frustration with the lack of, or the need for better, integration with other products and services:

*... We desperately need more integration functionality and flexibility for example for SRS/ LMS/ VLE ...*

## 20. Student training and information literacy

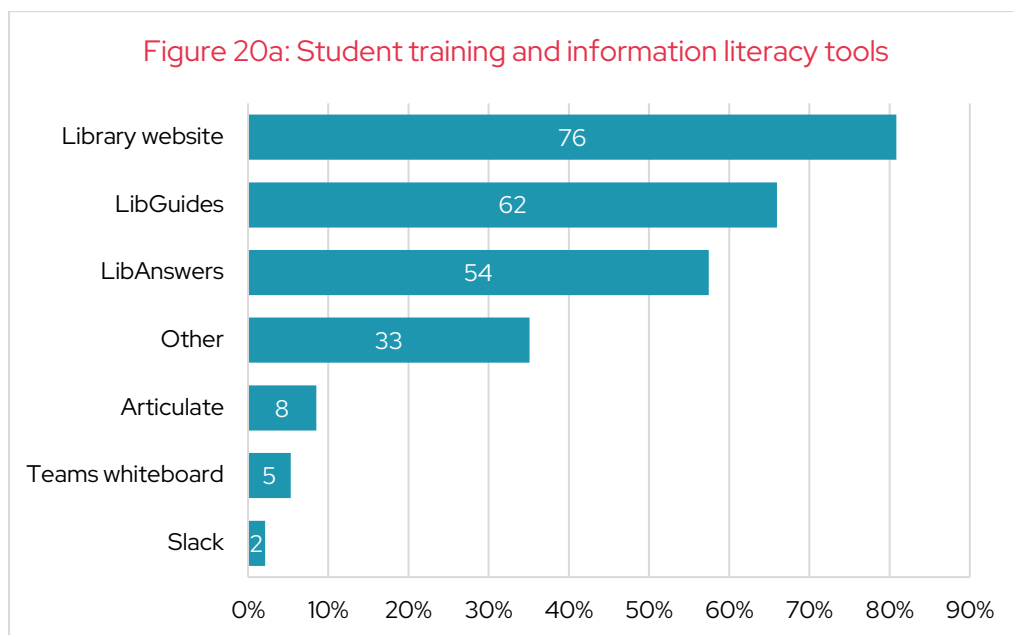
Survey respondents were given the following guidance:

Please include the wide variety of tools which may be used to support user education and training in terms of both teaching and learning and research including:

- solutions such as LibGuides that enhance the library website
- products such as Infobase which provide a content management system (CMS) with content
- locally developed library web pages based on a variety of CMS solutions
- collaboration tools such as Slack or Teams Whiteboard.

20.1 Figure 20a highlights that around four out of five respondents indicated they used the library website for student training and information literacy, while LibGuides were used by around two-thirds of respondents, and LibAnswers was used at almost 60% of responding institutions. Notably, 36 respondents (38%) indicated that they used all three of the library website, LibGuides and LibAnswers, while an additional 30 respondents (32%) noted they used two out of three of these services. Just two respondents (2.1%) indicated they used Slack and this has been omitted from Figures 20b-d.

20.2 Overall, 36 respondents noted they used at least one 'other' tool with eight indicating they used the Articulate 360 Platform, and this is reflected in the charts that follow.



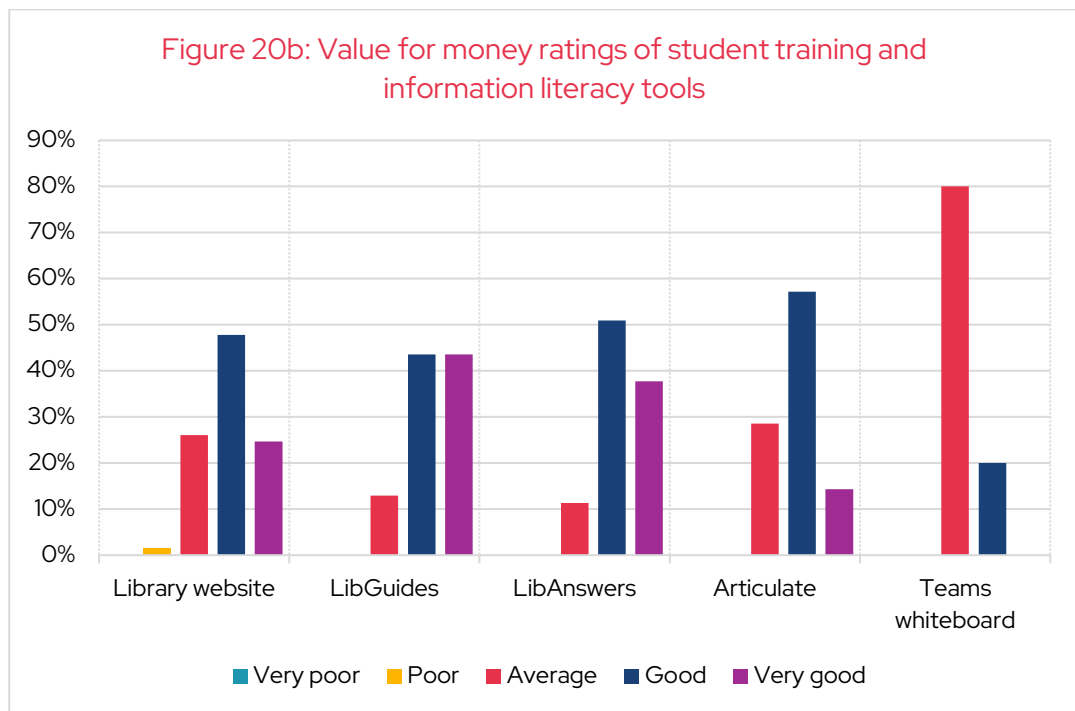
Percentages are based on 94 respondents indicating they used any of the products or services.

20.3 Details on the other systems used at responding institutions are provided in Table 24.

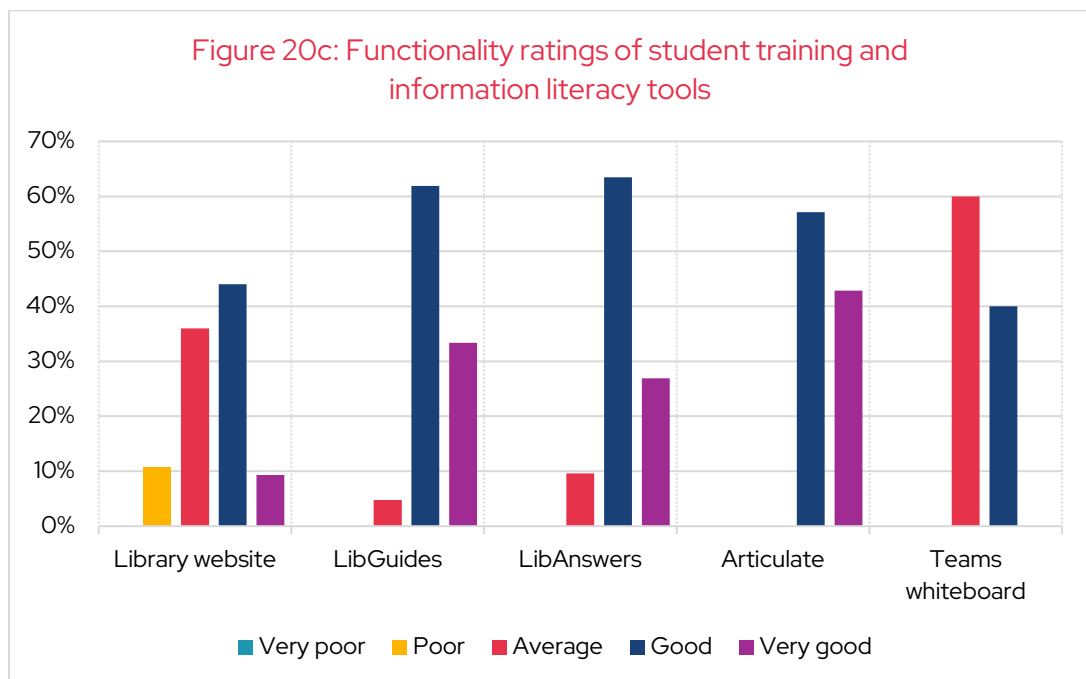
**Table 24: Other student training and information literacy products and services**  
(number of respondents in brackets)

<ul style="list-style-type: none"> <li>• Padlet (5)</li> <li>• Panopto (5)</li> <li>• Mentimeter (4)</li> <li>• Moodle (4)</li> <li>• LibWizard (3)</li> <li>• SharePoint (3)</li> <li>• Teams (3)</li> <li>• Canvas (2)</li> <li>• MS Forms (2)</li> <li>• WordPress (2)</li> <li>• Xerte (2)</li> <li>• Adapt Learning (1)</li> <li>• Animoto (1)</li> <li>• Blackboard Ultra (1)</li> <li>• Camtasia (1)</li> <li>• Canva (1)</li> <li>• Cite it right (1)</li> </ul>	<ul style="list-style-type: none"> <li>• H5P (1)</li> <li>• In-house (1)</li> <li>• Kentico (1)</li> <li>• Miro (1)</li> <li>• Office 365 (1)</li> <li>• Participoll (1)</li> <li>• Percipio (1)</li> <li>• PointSolutions (1)</li> <li>• Poll everywhere (1)</li> <li>• Pressbooks (1)</li> <li>• ServiceNow (1)</li> <li>• Slido (1)</li> <li>• Studiosity (1)</li> <li>• Tophat (1)</li> <li>• Vevox (1)</li> <li>• Woodclap (1)</li> <li>• Zoom (1)</li> </ul>
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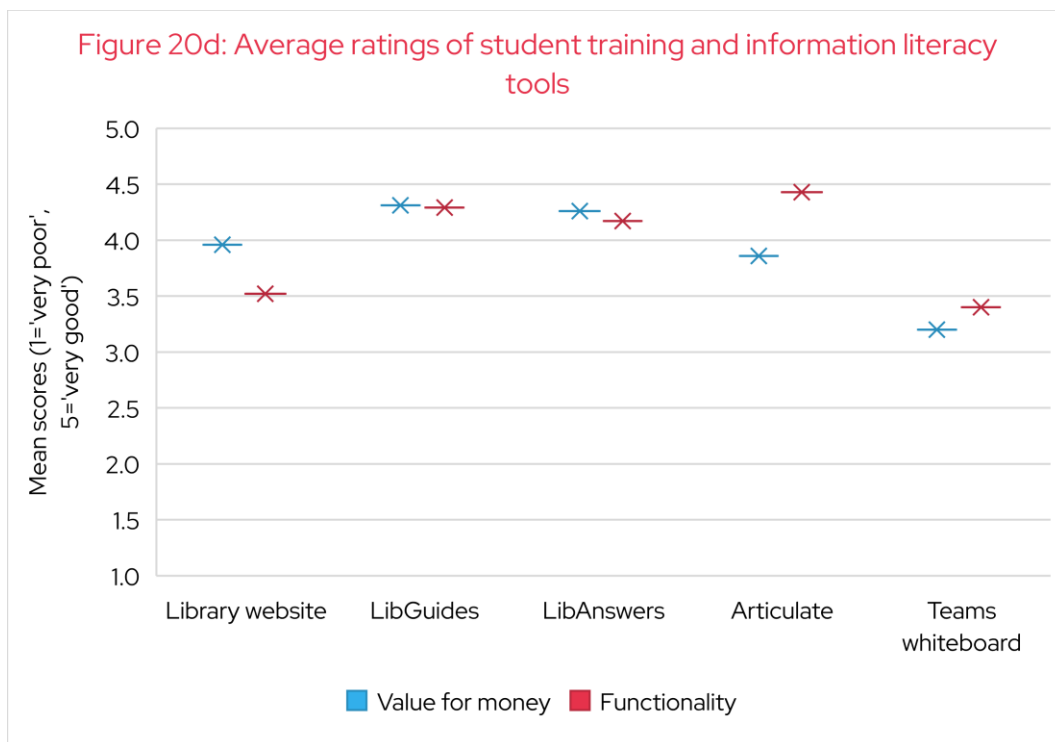
20.4 Figure 20b (page 105) illustrates that there is little difference in the value for money satisfaction levels of student training and information literacy tools, except for Teams Whiteboard which was considered to offer 'average' value for money by four out of the five respondents rating it. Elsewhere, the proportion of respondents considering a product to offer 'good' or 'very good' value for money ranged from 71% for Articulate to 89% for LibAnswers.



20.5 When we consider the functionality of the products and services for student training and information literacy (Figure 20c), the library website did not perform as highly, with just over half of respondents rating it as ‘good’ or ‘very good’. This compares to LibAnswers and LibGuides which were each considered to provide above average functionality by at least 90% of respondents and Articulate which was rated positively by all seven respondents supplying the information.



20.6 Figure 20d displays the average ratings for the student training and information literacy tools and illustrates that LibGuides and LibAnswers performed on a similar level for both value for money and functionality. Figure 20d also highlights that the library website achieved a higher average rating for value for money than functionality, while the reverse is true for Articulate and Teams Whiteboard, although they were both based on a smaller number of respondents.



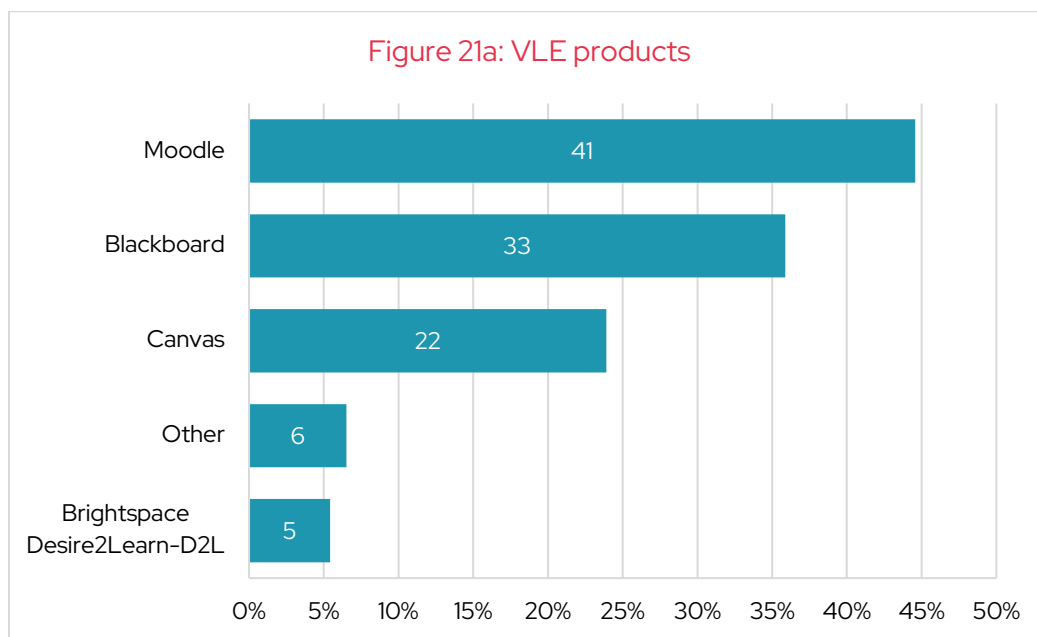
20.7 Several respondents included additional comments on student training and information literacy tools; however, they largely provided more detail on the use of the solutions and the situation at individual institutions, along with details on additional solutions used, with no common themes emerging.

## 21. Virtual learning environment/learning management solutions

Survey respondents were given the following guidance:

Please include information about your virtual learning environment/learning management system irrespective of whether or not the library provides or manages it. You should consult with Learning Technologies or IT to give greater clarity on the value for money and functionality questions.

21.1 Figure 21a highlights that Moodle was the most popular VLE product and was used at 41 responding institutions (45%), followed by Blackboard (33 respondents, 36%), Canvas (22 respondents, 24%) and Brightspace Desire2Learn – D2L (five respondents, 5.4%). Overall, six respondents indicated that they used an ‘other’ solution and the details are provided in Table 25.

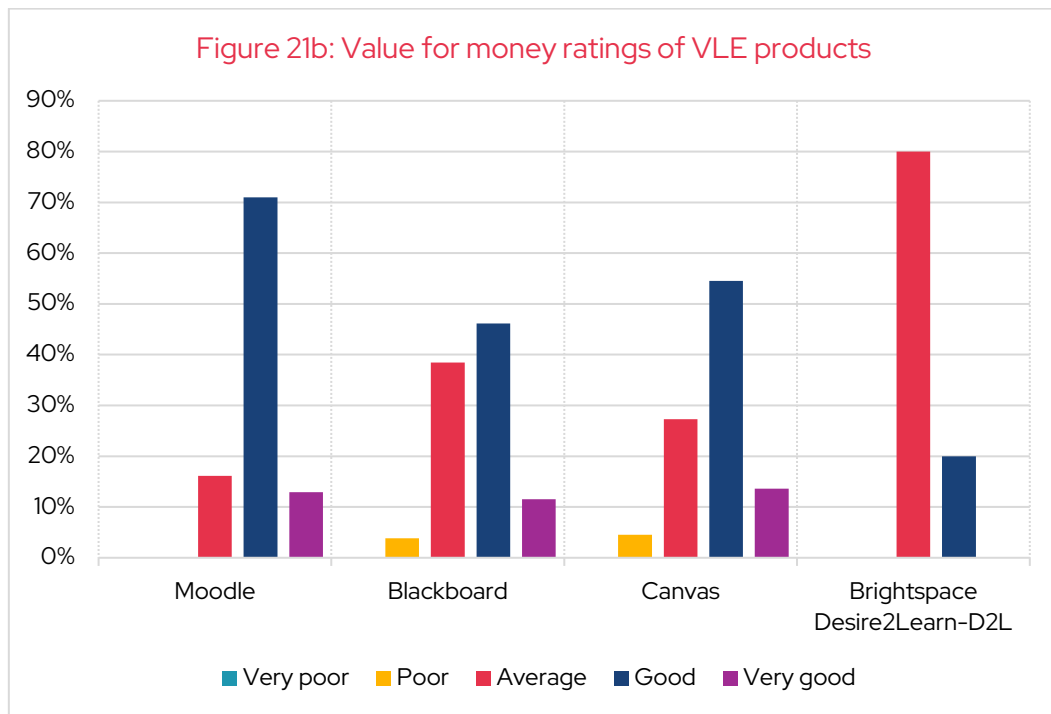


Percentages are based on 92 respondents indicating they used any of the products or services.

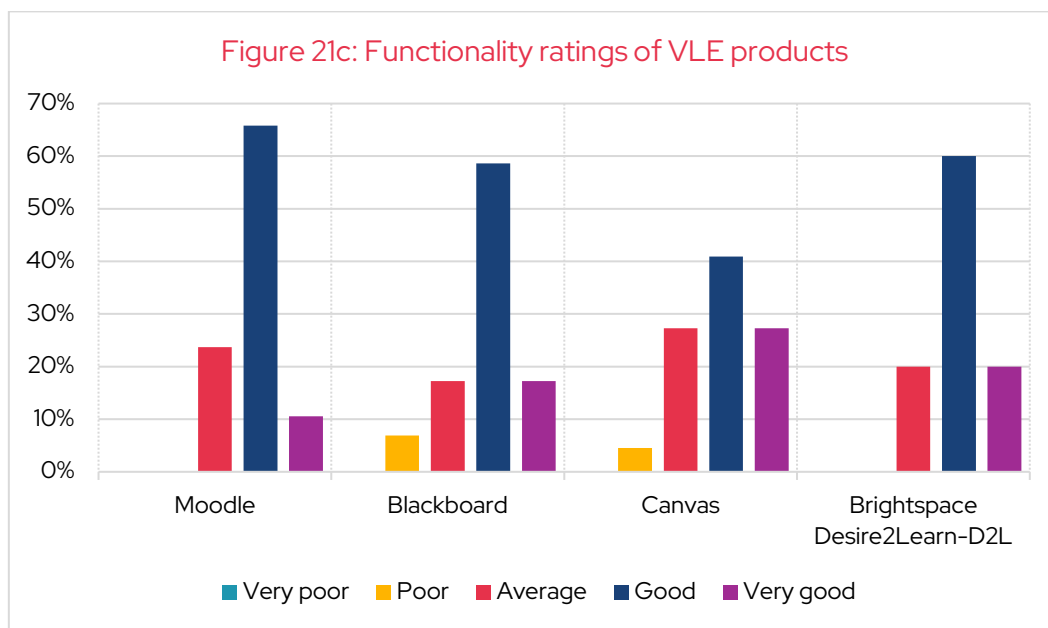
**Table 25: Other VLE/learning management solutions**  
(number of respondents in brackets)

- |   |  |
|---|--|
| <ul style="list-style-type: none"> <li>• Aula (2)</li> <li>• Blackboard Ally (1)</li> <li>• Coursera (1)</li> <li>• Google Classroom (1)</li> </ul> | <ul style="list-style-type: none"> <li>• InsendiParticipoll (1)</li> <li>• Minerva (1)</li> <li>• Panopto (1)</li> <li>• Zoom (1)</li> </ul> |
|---|--|

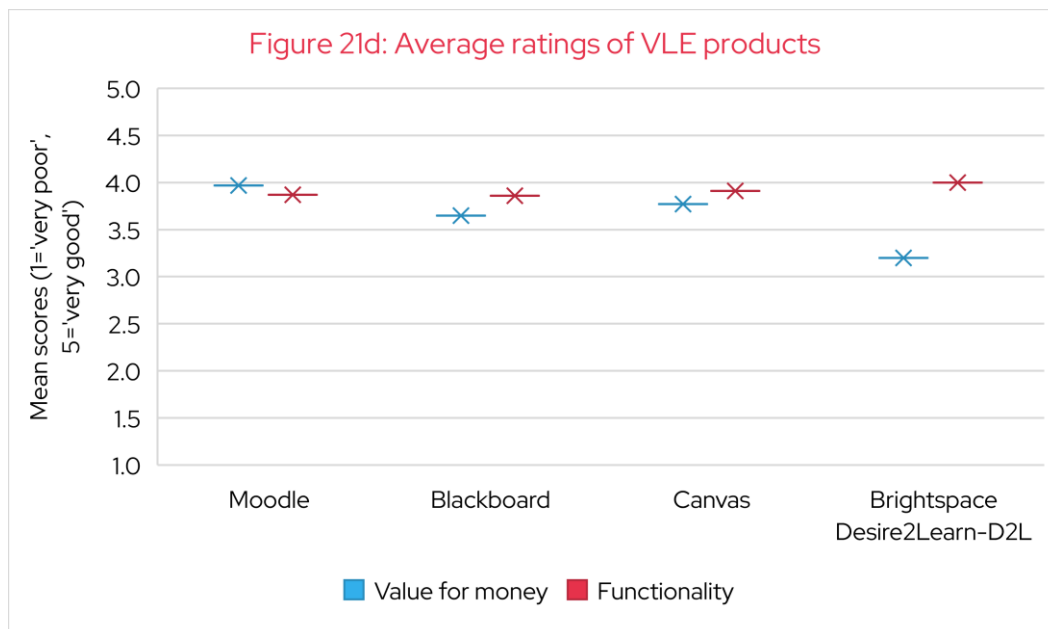
21.2 Figure 21b displays the range of value for money ratings of VLE products, and highlights that Moodle achieved the highest satisfaction levels overall, with 84% of respondents rating it 'good' or 'very good', which is possibly owing to it being a free resource. In contrast, Brightspace Desire2Learn obtained the lowest satisfaction levels, with just one out of five respondents rating it positively for value for money.



21.3 Figure 21c (page 109) also highlights higher satisfaction levels for Moodle, with around three-quarters of respondents rating it above average for functionality, lower than the 84% rating it positively for value for money. Just over two-thirds of respondents rated Canvas as 'good' or 'very good' for functionality, three-quarters of respondents rated Blackboard positively, while four out of five respondents considered Brightspace Desire2Learn to provide 'good' or 'very good' functionality.



21.4 Figure 21d illustrates that Blackboard, Canvas and Brightspace Desire2Learn performed better for functionality than for value for money, on average, while the reverse is true for Moodle. Notably, none of the systems achieved an average rating higher than 4.0, corresponding to a 'good' rating, for either value for money or functionality.



21.5 The supplementary comments made by respondents largely indicated that the library was not responsible for the VLE with no additional themes emerging.



## 22. Open institutional publishing

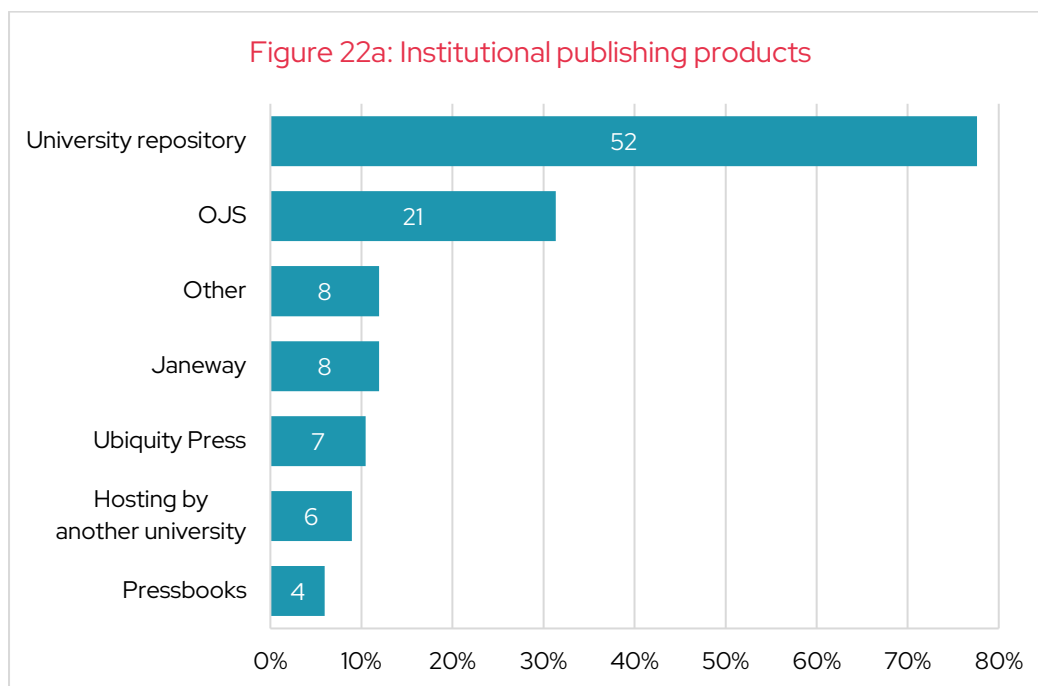
Survey respondents were given the following guidance:

Excluded here are 'conventional' university presses. This section is concerned with the trend towards the open publication of institutional journals and ebooks.

Please include:

- publishing platforms by specialist providers like Ubiquity Press and Highwire
- services from universities, such as the University of Edinburgh's journal-hosting service, the University of St. Andrews's journal-hosting service and the University of Warwick journals
- the institutional repository.

22.1 Figure 22a displays the open institutional publishing tools used across the sector and highlights that the university repository was used at just over three-quarters of responding institutions. Open Journal Systems (OJS) was the next most popular system; however, this was some way behind and was used at 21 responding institutions (31%), followed by Janeway (eight respondents, 11.9%), Ubiquity Press (seven respondents, 10.4%) and hosting by another university (six respondents, 9.0%). Pressbooks was used at just four responding institutions (6.0%) and is omitted from Figures 22b-d.

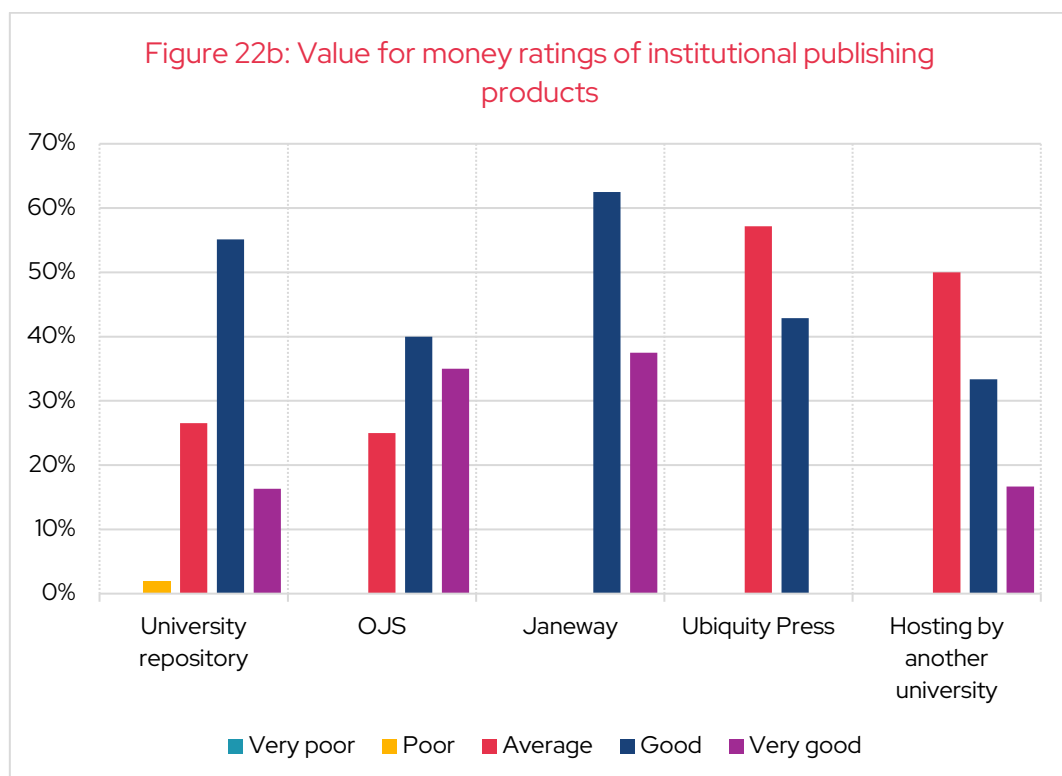


Percentages are based on 67 respondents indicating they used any of the products or services.

22.2 Overall, eight respondents indicated that they used an 'other' system for open institutional publishing and the systems are listed in Table 26.

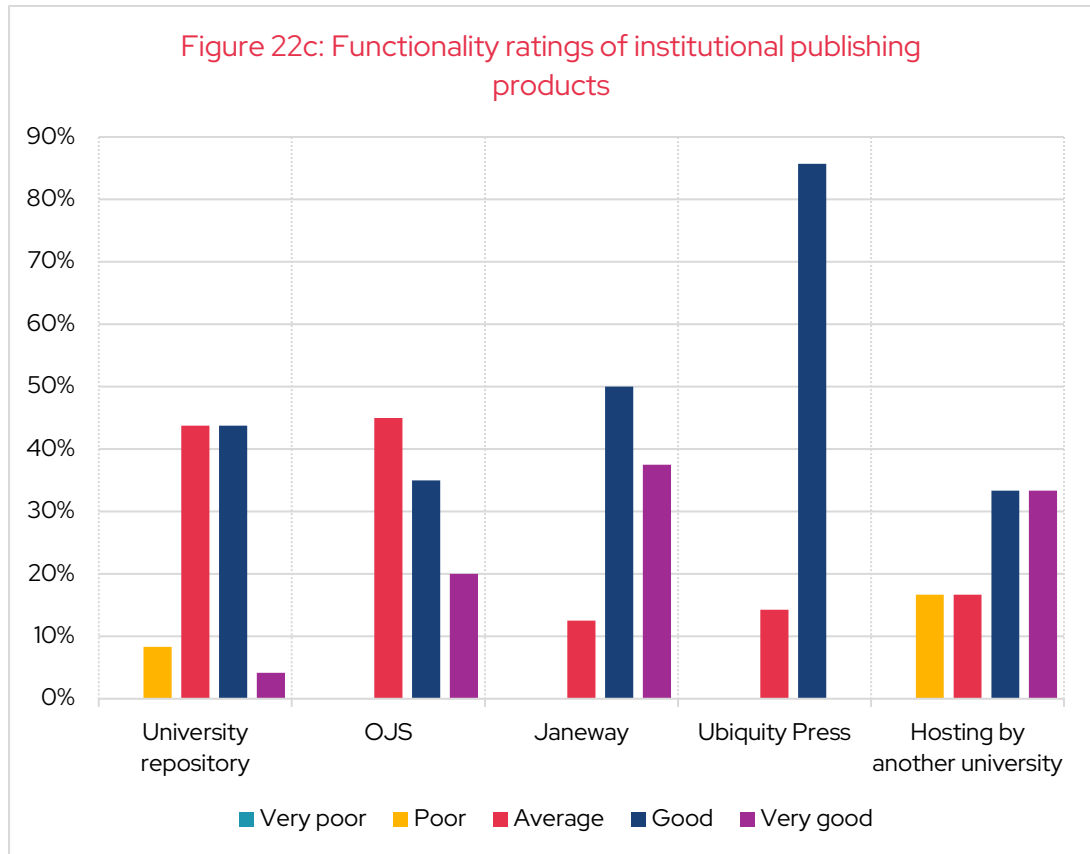
Table 26: Other institutional publishing products (number of respondents in brackets)	
<ul style="list-style-type: none"> <li>DSpace (1)</li> <li>EPrints (1)</li> <li>OMP (1)</li> </ul>	<ul style="list-style-type: none"> <li>Preservica Universal Access (1)</li> <li>PubPub (1)</li> <li>Scholastica (1)</li> </ul>

22.3 Overall, the proportion of respondents considering the systems to provide 'good' or 'very good' value for money ranged from 43% for Ubiquity Press to 100% for Janeway (Figure 22b). Figure 22b also highlights that more than half of respondents rating Ubiquity Press considered it to offer 'average' value for money, and this was also the case for half of respondents indicating they used hosting by another university for open institutional publishing. However, it should be noted that, apart from the university repository and OJS, the ratings are based on fewer than ten respondents.

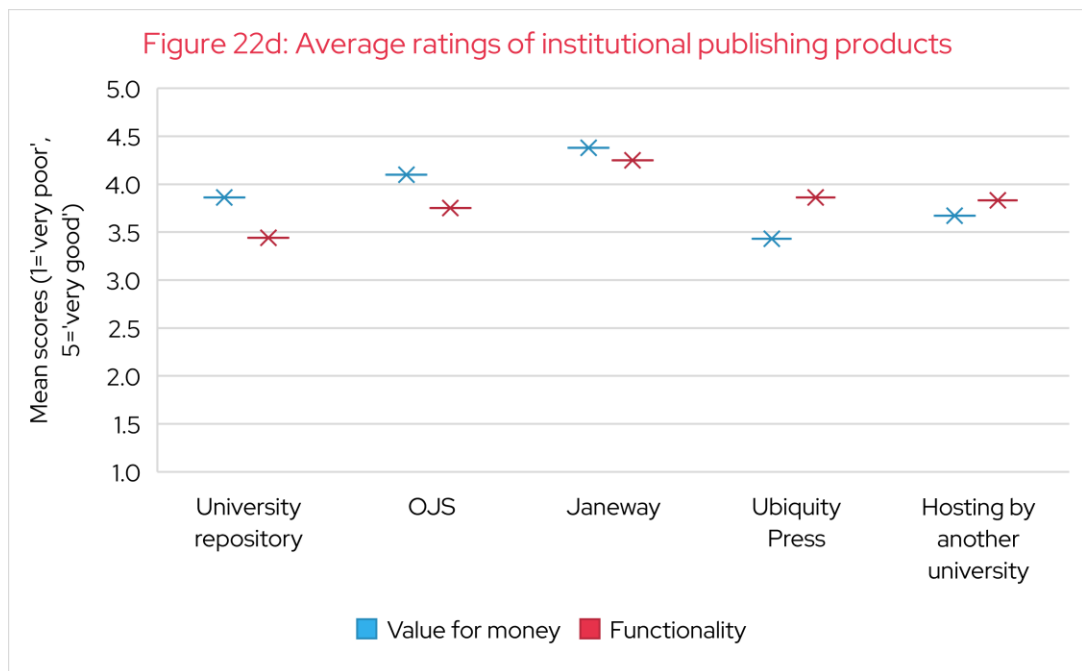


22.4 A slightly different picture emerges when we consider functionality (Figure 22c, page 112), with both hosting by another university (67%) and Ubiquity Press (86%) achieving a higher proportion of respondents rating their functionality positively

compared to value for money, while the reverse was true for the university repository, Janeway and OJS. Overall, the proportion of respondents considering the systems to provide 'good' or 'very good' functionality ranged from 48% for the university repository to 88% for Janeway.



22.5 This pattern is highlighted further by Figure 22d (page 113) which illustrates that the university repository, OJS and Janeway all achieved higher average ratings for value for money than for functionality, while Ubiquity Press and hosting by another university all performed better for functionality. Janeway was the only system to achieve an average rating above 4.0 for functionality, while both OJS and Janeway achieved an average higher than 4.0 for value for money, indicating that respondents generally rated these systems positively.



22.6 Several respondents included additional comments on open institutional publishing tools; however, these largely provided more detail on the use of the solutions and the situation at individual institutions, along with details on additional solutions used, with no common themes emerging.

## 23. The technology landscape

### Emerging technologies/services

23.1 Respondents were asked to provide information on new or emerging technologies or services that were being explored at either their own or other institutions, with several noting individual tools and how they were hoping to integrate them in to current workflows, or to upgrade current systems.

23.2 The predominant emerging area was digital advancements, with a particular emphasis on AI. However, institutions were investigating possible benefits of AI tools in a variety of ways, although not all respondents elaborated. Several indicated that they were considering introducing AI Chatbots, such as Copilot and ChatGPT:

*AI Chatbot for enquiry handling.*

23.3 While others were investigating the possible uses of AI for information literacy, and several indicated they were particularly interested in generative AI:

*We are very interested in generative AI for metadata, both for cataloguing and for descriptive metadata. Pilot projects are already underway in the library to explore solutions. Objectives are to understand the potential of various software solutions, shortcomings, and how they could roll into our operational work, if appropriate.*

23.4 Some respondents also indicated that they were either already exploring, or were interested in exploring, the possibilities of AI in resource discovery:

*We would be interested in exploring AI Discovery (possibly as a widget/add on to other systems), but feel this is in no way a formed "thing" yet, so will keep horizon scanning.*

23.5 Respondents also indicated that they were exploring other digital areas, with augmented/virtual reality mentioned by some:

*We are providing staff and students with access to AR/VR tools and extended reality equipment to support innovations in curricula, delivering enhanced situated and experiential learning opportunities.*

*This is being supported through our Digital Creativity lab. Our stated objective is to promote the use of augmented and virtual reality services to support digital learning opportunities and experiences.*

- 23.6 While others also mentioned evaluating library space, including developing maker spaces with the latest equipment and technologies:

*Considering spaces such as data visualisation lab, podcast studios or VR. Trying to address introducing variety of spaces for students use.*

- 23.7 Additionally, several respondents indicated that they were considering emerging technologies for space monitoring:

*Intelligent space monitoring to help with the evolution of our Library estate.*

- 23.8 Other areas discussed by respondents included system integrations and the use of API's, open research/publishing, streamlining workflows and the linking of data. However, notably, several respondents also noted that they were currently unable to explore any new and emerging technologies due to budget constraints, as well as the prohibitive costs in these areas:

*Not exploring new areas due to severe financial constraints.*

### Use of AI

- 23.9 While AI emerged as one of the key technologies that respondents had either newly implemented or were interested in exploring further, several respondents also indicated that the library was not currently making use of any AI tools, with some noting that they expected this to change in the next academic year. Others noted that they were either currently developing AI tools internally, were working with suppliers (including beta testing AI products/plugins), or were waiting for suppliers to further develop their AI offering before implementing tools:

*We await further developments from other suppliers in respect of AI in their products. We take the view that it is for suppliers to develop their functionality in response to sector needs, and we will take a view on if we want to harness it when it is ready.*

23.10 Where AI tools were already in place, chatbots such as ChatGPT and Copilot were the most popular, although it was occasionally noted that these tools were used informally, rather than endorsed by the institution:

*Nothing specifically - informal use of Chat GPT ...*

23.11 Some respondents provided further details on their use of tools such as ChatGPT and Copilot and reported that they were used to check metadata, to perform repetitive tasks, for learning and teaching use and to assist with writing papers and emails, amongst other things. While others indicated that they were currently making use of generative AI tools:

*Staff are using generative AI as part of their everyday work, to generate reports, lesson plans etc ...*

23.12 Several respondents indicated that, while the library was not always using AI tools themselves, they had been enlisted to provide guidance, advice or training on AI tools:

*... Some use by individual library staff and individual academics; Library providing some 'AI literacy' guidance as well as info about citing and referencing AI generated content.*

23.13 Other AI tools in use at responding institutions include, but are not limited to:

- AI Metadata Assistant
- AWS Rekognito
- Consensus AI
- Covidence
- DALL-E
- Google Gemini
- Illicit
- Integrated AI available in Adobe
- Keenious
- Mentimeter
- Perplexity
- Research Rabbit
- SciSpace
- Scite
- Scopus AI
- Studiosity
- Transkribus

## Use of AI tools on library websites

23.14 Respondents were also asked to indicate whether AI tools were being used in any functional areas of their websites, not already covered by the survey. Overall, 50 respondents provided detail, including 35 reporting that AI tools had not currently been implemented in any additional ways on their website. Several respondents noted that chatbots and LLM's were being used, along with AI tools for research, Keenious, Handwritten Text Recognition tools, Mentimeter and Studiosity; however, it was not always clear in what capacity these tools had been implemented.

## Technology concerns

23.15 Respondents were asked to note whether they currently had any concerns about library technology or its providers, with the lack of competition and dominance of one or two providers emerging as key themes. Several respondents, expressed concern with the shrinking LMS market and the dominance of Ex Libris/Clarivate products and the impact this might have on academic libraries:

*The Library Management System marketplace is largely a monopoly at this juncture. Far too many library services and tools are concentrated in Clarivate and its associated companies, which ought to be a real concern.*

23.16 Some concerns were also raised about Ex Libris being based in Israel, while other respondents also expressed concern with the lack of competition in discovery platforms, and the impact of company mergers on the marketplace:

*... Proquest bought Ex Libris who in turn were bought by Clarivate. It's either Clarivate or EBSCO. Not much choice when it comes to discovery, knowledge bases etc ...*

23.17 Several respondents also expressed concerns with the increasing costs of library resources, including in new and emerging areas:

*... The cost to keep up with new technology is prohibitive and impacts our resource provision ... and impacts our resource provision.*

23.18 Concerns around AI tools were also raised, including with generative AI tools, while some respondents expressed concerns with AI, copyright and data protection, and several highlighted the impact of these tools on licensing agreements and the potential issues this may cause in the future:



*Content publishers are adding AI clauses to publishing deals. E.g. "Licensee and Authorized Users may not use artificial intelligence tools or machine learning technologies with any of the content included in the Databases or Services for any purpose." Our content teams are referring to <https://nationalcentreforai.jiscinvolve.org/wp/2024/06/19/guidance-on-resisting-restrictive-ai-clauses-in-licences/> and negotiating where they can. But ultimately we are accepting these clauses. Which may have an impact in the future.*

23.19 Respondents also noted that the current trend appears to be for AI tools to be extra or add-ons to current systems, rather than integrated within existing systems, which will potentially lead to additional costs if a library wants to keep up with emerging technologies.

23.20 Some concerns were also raised about the current financial constraints on library budgets, the lack of awareness of this by suppliers, as well as the costly supply of ebooks, and in particular etextbooks, and how this will impact on the service academic libraries are able to provide for its users. Some respondents also noted the aggressive sales tactics employed by e-textbook suppliers:

*E-textbook providers and the predatory marketing techniques that they employ, targeting students with add-on (paid for) services.*

## SCONUL support

23.21 Respondents were also asked to provide details on how SCONUL could continue to support institutions with regards to both existing and emerging technologies and a wide range of views were communicated.

23.22 Some respondents felt that SCONUL should be continuously horizon scanning to identify emerging trends and raise awareness of these areas within the sector, along with the widespread sharing of good practices, including through the use of case studies. Respondents also indicated that it would be beneficial if SCONUL could continue to advocate for academic libraries to ensure that suppliers provide improved value for money, to provide a unified front and reduce the disparity between institutions and potentially negotiate lower prices:

*By being mediators in ensuring realistic costs for all library related products and services. Despite current budget restraints on many university budgets, suppliers continue to increase costs.*

23.23 Additionally, several respondents indicated that it would be helpful if SCONUL could run training sessions and webinars, potentially including suppliers, to provide more information and guidance on the available tools and any integration with existing systems, as well as generally providing continued support to libraries navigating the AI landscape:

*SCONUL could support our institution by facilitating access to best practices and guidelines for integrating emerging technologies, providing platforms for collaboration and knowledge sharing among member institutions, and advocating for favourable terms and conditions with technology providers to ensure affordability and interoperability. Additionally, SCONUL could offer training and professional development opportunities to help our staff stay updated with the latest technological advancements.*

23.24 Respondents also noted that it would be helpful if SCONUL could identify skillsets required to work with emerging technologies, and potentially provide job specifications for more technical roles.

## 24. Evaluation questions

24.1 Respondents were asked to indicate whether there were areas of technology not covered by the survey, with several providing details of specific products and services, or suggestions of more in-depth questions on the use of technology to be included in the survey and integrations with other systems. Those areas identified by respondents include the following, although it should be noted that, except for a couple of exceptions, most were only mentioned by one or two respondents:

- Accessibility support
- AI
- Appointment booking tools
- Assistive technologies
- Augmented/virtual reality
- Book sorters/automated retrieval systems
- Booking tools
- Browser extensions
- Card and account management
- Copyright and licensing
- Digital libraries, digitised articles and digital lending
- Digital preservation
- Hardware such as 2D and 3D scanners and 3D printers
- Interactive eLearning courses
- RDM solutions
- Reference management tools
- Research data management
- Special collections content
- Survey kiosks
- Wayfinding tools.

24.2 Respondents were also asked whether the technology survey had revealed anything that they were previously unaware of. Some respondents indicated that it had helped them discover which systems were used in some areas of library technology, while other noted that it had raised awareness of both suppliers and available products and services, as well as the wide range of technology in place at their own institution:

*... I didn't realise how many different forms of technology we used in the library and how many people across the library were involved in using and managing those services ...*

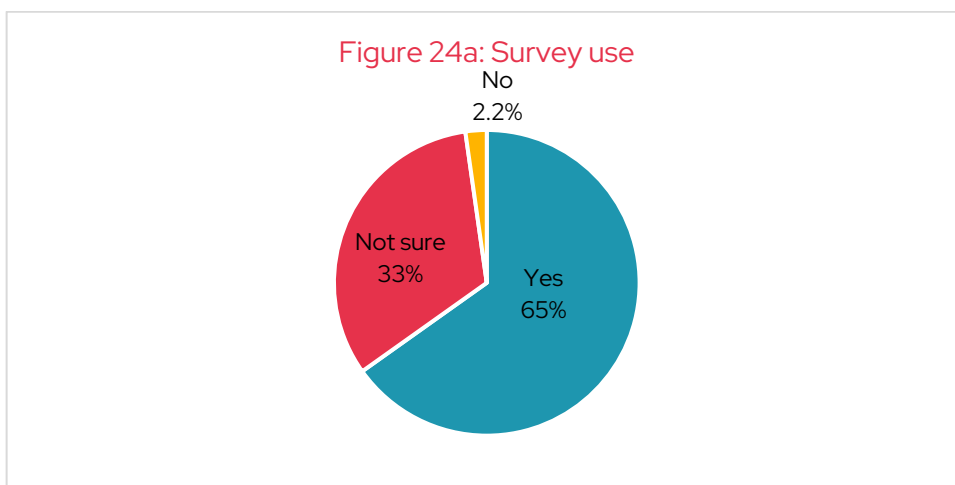
24.3 Additionally, others noted that the survey had highlighted the potential underinvestment in library technology at their institution, as well as exposing potential gaps in service delivery. While others noted that the survey had emphasised the collaboration within institutions to provide these services:

*That running and supporting these platforms and services is a truly cross-library collaboration. All our directorates are contributing.*

24.4 While others indicated that the survey had provided an opportunity to collate the information in one place:

*We have recently had some changes in personnel and it has become apparent that there was no centrally held overview of technologies and who own them. We were working on this already, but the survey has given us an opportunity to gather all of this information together in one place and start to evaluate the tools and technologies we use.*

24.5 Figure 24a illustrates that almost two-thirds of respondents envisaged using the results of the survey to inform their own practices and development, one-third were not sure if they would use the findings of the survey, while just two respondents (2.1%) did not think they would use the survey results.



24.6 Several respondents indicated that the survey would be beneficial in highlighting which services are being used across the sector, and potentially identify opportunities for collaboration between institutions. Others noted that the survey would provide a good benchmarking exercise and could assist with procurement stages.



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