Koha in French academic libraries network

1. Introduction

The aim of this paper is to give a feedback on the adoption of Koha in the French academic libraries network. As Koha is the most used open source Library Management System (LMS) worldwide,[1] the French case is just one among a lot of other examples. Yet, France stands out due to the early implementation of Koha by several large academic libraries between 2010 and 2012. Moreover, it is now the second most used LMS amongst French academic libraries. The KohaLa association played a key role to ensure the development of the community users. Created as early as 2007, it is acknowledged by the "Agence Bibliographique de l'Enseignement supérieur" (ABES)[2], the bibliographic agency for Higher Education, as a trustworthy stakeholder.

The paper starts with a look at the origins of Koha, providing a historic outline of the software development. Secondly, the steering role of ABES as a national supervising authority for bibliographic services is explained, as well as the determinants of how the implementation of Koha spread amongst academic libraries. Finally, the major future challenges faced by the community are discussed.[3]

2. Koha: An astonishing history and longevity

Koha was originally created in New-Zealand in 1999 by 3 developers in order to replace the LMS of a local public library that could not handle the change of calendar data due to the year 2000 issue. The Koha code was directly released with an open source license, under the GNU General Public License (GPL). It rapidly raised the interest of other developers. As soon as 2002, a French developer became the 7th contributor to Koha software development. Over a 25-year period, the pool of contributors surged from 3 to 502 people.[4] Each release remains a collaborative process. For instance, the 24.05 release has benefited from the participation of 68 people coming from 30 institutions located in 4 different continents.[5] This momentum is also reflected in the growing number of support services. There are now almost 80 companies providing services around Koha.[6] It is always difficult to draw up a list of libraries using Koha as they can download and install Koha without informing the community. What's more, customer support companies are not always willing to share data about their clients. Yet, according to Marshall Breeding, Koha is the most widely used open source LMS at the international level.

The development of Koha is very dynamic as 2 versions per year are released, following a strict process of quality control. Corrections or new features have to be assessed and approved according

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1 Breeding, Marshall, Koha. The Original Open Source LMS, Library Technology Reports, 53 (6), 2017p. 9–17, https://journals.ala.org/index.php/ltr/article/view/6405/8452, last accessed 17.08.2024.
2 https://abes.fr/en/l-abes/presentation/, last accessed 21.08.2024.
3 This paper refers to the presentation «Koha in French academic libraries network» by the author on 4 June 2024 at BiblioCon 2024 in Hamburg, Germany.
4 https://koha-community.org/about/history/, last accessed 21.08.2024.
5 https://koha-community.org/koha-24-05-00-released/, last accessed 21.08.2024.
6 https://koha-community.org/support/paid-support/, last accessed 21.08.2024.

to specific coding rules. The quality of the code is checked by a team of developers independent from the person who submitted the developments. The release manager has the final say in deciding whether the code can be integrated in Koha. Most functional checks can be done by users through sandboxes. It is really interesting for systems librarians to be able to test a feature and give their feedbacks. The code is continuously checked and cleaned up. With each version, corrections within the architecture and internal code are made to keep Koha up to date and compliant with coding rules and technical requirements (by Linux distribution, for instance). The code of Koha also integrates new programming languages such as JavaScript, to keep it congruent with new standards. As modularity is essential for a modern software, Koha offers a wide range of API[7] to interact with other systems. Since its first release, Koha has proved its robustness and keeps being supported by a relentless community of librarians and developers.

3. Bibliographic organization in France

The ABES was created in 1994. In France, the institution plays a leading role in the bibliographic network of higher education. ABES is the supervising authority of the SUDOC national catalog, gathering around one hundred and sixty institutions (with 1.500 academic or research libraries). Libraries collaborate to describe their print resources as well as a part of their electronic resources, especially ebooks. SUDOC is also a major tool to ensure the interlibrary loan service. But the activities of ABES go even further. It is also in charge of the Calames network[8] which aims at raising awareness of written heritage, and through which libraries describe archives and manuscripts in the XML standard Encoded Archival Description (EAD). The ABES is also responsible for reporting all PhD theses in a national database, covering the full process from the submission of a thesis subject to the release of the official version. As a partner of Couperin, a consortium in charge of electronic resources management, the ABES provides kbart[9] files comprising metadata of all electronic resources, for which it benefits from a commercial agreement negotiated by Couperin. ABES is also maintaining the IdRef database, which consists in a permanent digital identifier used for different authorities, in particular the author ones.

Since 2000, the SUDOC collective catalog has been based on CBS (the Central Bibliographic System provided by OCLC Pica). For academic libraries working within the network, this means they have to describe their collection in the union catalog, not in their local LMS. Bibliographic records are exported on a regular basis to the libraries. This helps librarians benefit from other colleagues' enhancements of the records. It also ensures metadata standardization. Bibliographic records are retrieved through a specific transfer[10]. Each library has to set a connector into its LMS to be able to retrieve its bibliographic records automatically.

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7   https://api.koha-community.org/, last accessed 21.08.2024.
8   https://abes.fr/en/reseau-calames/le-reseau/etablissements-membres-reseau-calames/, last accessed 17.08.2024.
9   KBART : Knowledge Bases and Related Tools. Recommended pratices for metadata formatting and exchanges for knowledge bases, https://www.niso.org/standards-committees/kbart, last accessed 03.09.2024.
10 For each libraries, ISO2709 files are available on FTP server after a prior email exchange that ensure that the library identification, https://abes.fr/wp-content/uploads/2020/07/transferts-reguliers-sudoc.pdf, last accessed 03.09.2024

4. Koha in the SUDOC network

Koha is one of the most installed LMS in the SUDOC network, currently used by almost one third of the institutions (50). This is on a par with Exlibris (Clarivate), which represents 52 institutions with Aleph or Alma. However, institutions using an Exlibris LMS are generally larger, as many of them come from merged universities over the last 10 years.

The Koha network is made up from several types of institutions: 18 universities, 17 Grandes Ecoles (i.e., prestigious institution of higher education for professional or technological training), 15 research institutes. Among universities, several major institutions stand out, such as:

- Aix-Marseille University: more than 80.000 students, 1,6 million items, 272.000 loans by year;[11]
- Bibliothèque universitaire des langues et civilisations (BULAC), based in Paris, specializing in foreign languages and providing services for several universities: more than 1,5 million items; 23.000 patrons, 32.000 loans, 43.000 closed stacks operations.[12]

Several other universities using Koha register each more than 25.000 students: Lyon 3 University, Lyon 2 University, Nice Côte d'Azur University, Rennes 1 University.

As a university specializing in Human and Social Sciences, Lyon 3 University is made up of 4 faculties: Law, Languages, Arts and civilization and philosophy, as well as 2 institutes: the Institute of Business Administration and the Institute of Technology. The University totals up 29.000 students, 2.000 professors and 700 technical and administrative staff. The library team is made up of 70 permanent staff, spanning 3 different sites and working with 20 associated libraries. The library collection houses 360.000 items and 70 active journal subscriptions. Last year, Lyon 3 library totaled up almost 1 million visits and 136.000 loans.

5. Reasons for choosing Koha

The conditions in France were particularly appropriate to a massive adoption of Koha. It was a French developer who pioneered the Koha development in 2002 and began to act as a service provider for libraries. The academic library of "Ecole des Mines Paris" (an engineering school) chose to adopt Koha in 2004. As pioneers, they decided to organize the first international Koha conference in Paris in 2006. In 2005, a think tank dedicated to open source LMS was created in the Lyon area. In addition, the association Kohala, which aims to promote Koha, was founded in Lyon in 2007. All of these developments promoted the early spreading of the software in France.

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11 https://bu.univ-amu.fr/sites/default/files/media-ressource/BU-RA-2022_WEB.pdf, last accessed 21.08.2024.
12 https://www.bulac.fr/document/rapport-dactivite-2023, last accessed 21.08.2024.

5.1 Early adopters

Back in 2010, adopting Koha was quite challenging and meant taking a chance. The very first adopters (Lyon 3 University in 2010 in collaboration with the Lyon 2 and Saint-Etienne Universities, Aix-Marseille University in 2011, BULAC in 2012), chose Koha in the first place because it was an open source system. Why so?

At the time, Lyon 3 University libraries wanted to choose a community-led system in order to cut off any commercial dependency with a single company. Back in 2006, the university issued a call for tender so as to change its former ILS, called GEAC Advance. It turned out that the ILS Corinthian by Dynix won the competitive deal. Yet, as the companies Sirsi and Dynix merged immediately afterwards, commercial priorities evolved at the expense of Corinthian, which ceased to be maintained. This led the University to put an end to the contract with the newly formed company. This unfortunate experience motivated the University to consider open source solutions as a viable option. In a collective momentum, Lyon 2, Saint-Etienne and Lyon 3 Universities launched the installation of Koha on their servers and started to cooperate in order to add missing features in the Koha 3 version (2008).[13]

Koha went live at Aix Marseille University in 2011. The decision came at a special moment in its history, while all the universities located in Marseille were merging. It was then considered as a way to streamline technical choices by spurring the adoption of a common open source tool.

BULAC library adopted Koha in 2012. They needed an application for which they could add new developments for their communication module. No commercial system had suitable features and it turned out that it was not more expensive to develop a new module. For BULAC University it was important to have an open source LMS to get access to the source code and be able to modify it if needed.

5.2 The situation today

New academic libraries keep adopting Koha every year and their choice is not necessarily driven by the open-source status of the application. It is rather the integration of Koha to the SUDOC catalog and discovery tools, the stability and the ergonomic design of the software and also the French environment that led to their decision.

On the support side, there are now two providers offering services for Koha in France[14], and also the KohaLa association. This background strengthens the durability and credibility of the software. As a users' association, KohaLa holds events and maintains a mailing-list. The association has a special interest group for questions regarding ABES tools. As previously mentioned, a connector with the SUDOC has been implemented. The association supported several developments to improve the

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13 Espiau-Bechetoille, Camille; Bernon, Jean; Bruley, Caroline; Mousin, Sandrine: An example of interuniversity cooperation for implementing Koha in libraries. Collective approach and institutional needs, in: OCLC Systems & Services: International digital library perspectives, 27 (1), 2011, pp. 40–44, https://doi.org/10.1108/10650751111106546.
14 Biblibre (https://www.biblibre.com/fr/) and Tamil (https://www.tamil.fr/), both last accessed 21.08.2024.

integration between Koha and those tools: for instance, a plugin using ABES web services to ensure quality checking on bibliographic records within Koha.

Koha is a very dynamic software, with additions to the latest releases each month, which enables libraries to enhance their services. For instance, in recent years, Lyon 3 University has begun to use the interlibrary loan module and also the "curbside pickup" one that allows students to make an appointment to borrow a laptop.

Another strength of Koha is that it is user friendly, as reflected by librarians' feedback after using the software for a couple of months: Easy to use for colleagues and does not require a lot of initial or continuous trainings[15] or We wanted a software really designed for users and supported by a community of librarians: ergonomic, evolutive and dynamic[16]

6. Current development

ABES is currently working on a complete change of their IT system[17] which will lead to the discontinuation of the OCLC Pica tool, CBS. ABES teams are working with all the users' groups, including KohaLa, to define the consequences of this major technical change. KohaLa is also involved in a specific ABES workgroup which is supposed to define all the features that should be specified in the call for tender.

New features are continuously added to Koha. One of them is the new Electronic Resource Management (ERM) module for instance, a long-awaited tool which has been introduced two years ago. Enhancements of the ERM module are still expected in future releases.

Communication tools within the international community are also undergoing changes. New tools have been adopted (Mattermost as a chat tool, Jitsy for monthly meetings). As the community is constantly growing, it was decided to create a Koha foundation, through the Open Library Foundation.[18] This will formalize governance structure, and improve communication and development processes.

7. Conclusion

Koha has been adopted by a wide range of academic libraries in France for more than 10 years. Its market share keeps growing as Koha is a steady and dynamically evolving software suited to the needs of academic libraries.

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15 "simple à utiliser par les collègues, et nécessitant peu de formations initiales et continues". Saby, Mathieu; Etallaz, Stéphanie: Retour d'expérience. Le passage à Koha du SCD Université Côte d'Azur. Présentation, Symposium Koha Grenoble 28/30 juin 2023, https://koha-fr.org/kohala/wp-content/uploads/2023/06/Presentation_UCA_vdef-1.pdf, last accessed 21.08.2024.

16 "Nous souhaitions un logiciel réellement pensé pour les usagers et porté par une communauté de bibliothécaires : caractère ergonomique, évolutif et dynamique". Degorgue, Florence: Le Mans Université. Passage à Koha en 2021, https://koha-fr.org/kohala/wp-content/uploads/2021/12/REX_Univ-Le-Mans_interview2021.pdf, last accessed 21.08.2024.

17 https://projet2024.abes.fr/docs/2.4/projet2024, last accessed 21.08.2024.

18 https://ptfs-europe.com/koha-foundation-proposal/, last accessed 21.08.2024.

In France, the role played by Kohala is definitely an asset because it helps to identify library needs as well as act as an ABES partner. Future challenges involve the change from the MARC model (UNI-MARC in France) to another bibliographic data standard. A national program, Bibliographic Transition in France[19], presented experiments on transferring MARC files that describe bibliographic data into an entity relationship model. KohaLa and the providers collaborated to make Koha support these files. But for now, the ABES has not made a choice regarding the format of bibliographic description that will be used in its next system. So, the French Koha community has to wait to propose real modifications in Koha. In any case, Koha has a great community in France and internationally, keeps growing and will keep adapting to the changes of the next decade.

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19 https://www.transition-bibliographique.fr/enjeux/bibliographic-transition-in-france/, last accessed 21.08.2024.