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# Free and subscription-based Reference Management Software

**Natasha Bayliss**

*Open-source and subscription-based reference management software in UK institutions: who is using what*

It seems that the provision of reference management software is a given in the Higher Education sector. However, which software package is chosen and how it is promoted varies widely. As our reference management software is due for renewal imminently, I was asked to investigate the software provision offered at other universities. When discussing the renewal of any subscription resource you are often faced with reassessing the value of the software and service you provide. Therefore considering the question what is everyone else doing seems inevitable.

So I set out to investigate the current state of play. Following some colleagues' advice I posted a quick survey of four questions to the JISC mail lists - LIS Link and LIS UCR. The first is a general library and information list, the second is the University, College and Research group list. I asked for feedback about the software packages in use, the institutions' experience of the software, if anyone promoted free alternatives such as Zotero or Mendeley and if anyone had switched to only providing free options.

I received seventeen replies from colleagues representing a diverse range of Higher Education institutions across the UK. Fifteen institutions from those surveyed subscribed to a software package, with the remaining two institutions only supporting free software. EndNote was the most used software within these institutions surveyed, closely followed by RefWorks. Unexpectedly the survey highlighted that some institutions are actually subscribing to multiple services - for instance EndNote, Reference Manager and RefWorks. The reasons cited for this included the historical development of Virtual Learning Environments within departments and user preference. One commonly highlighted issue with switching services is the need for continued support for users still working on previously supported software. The other is the need to promote and 'sell' the switch over to all involved.

Zotero was the free option promoted at both of the institutions without subscription packages. Intriguingly, when looking at why they had switched to only promoting free software, it transpired that they had never subscribed to subscription software. More commonly institutions promote free options alongside the subscription

software to offer users choice, not to act as a replacement. The predominant means of promotion usually takes the form of comparison tables or explanations of what software is available.

The overwhelming consensus was that while everyone is watching the current developments in free software with interest, no one is prepared to stop subscription services. The main reason for this is that they have not been reassured that the free options will fulfil all the criteria required by their users or provide the technical support required. For example one institution surveyed sixty-five free software packages and found that only two (Zotero and Mendeley) fitted their criteria. Perhaps a way to allay these concerns would be to monitor the usage of both free- and paid referencing software within an institution and analyse the outcome.

The findings indicated that we are not alone in our current practices. While free options are promoted, no one has abandoned the subscription model, although some institutions are more actively promoting the free options available in conjunction with their own service provision. The information collected from this survey has been fed back into our software review process (which at the time of writing is still ongoing).

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