

BS ISO 2789:2013



BSI Standards Publication

# Information and documentation — International library statistics

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**National foreword**

This British Standard is the UK implementation of ISO 2789:2013. It supersedes BS ISO 2789:2006 which is withdrawn.

The UK participation in its preparation was entrusted to Technical Committee IDT/2/15, Library and publishing statistics.

A list of organizations represented on this committee can be obtained on request to its secretary.

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© The British Standards Institution 2013. Published by BSI Standards Limited 2013

ISBN 978 0 580 78215 2

ICS 01.140.20

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This British Standard was published under the authority of the Standards Policy and Strategy Committee on 30 September 2013.

**Amendments issued since publication**

Date	Text affected
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INTERNATIONAL  
STANDARD

BS ISO 2789:2013

**ISO**  
**2789**

Fifth edition  
2013-09-01

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**Information and documentation —  
International library statistics**

*Information et documentation — Statistiques internationales de  
bibliothèques*



Reference number  
ISO 2789:2013(E)

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Published in Switzerland

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## Foreword

ISO (the International Organization for Standardization) is a worldwide federation of national standards bodies (ISO member bodies). The work of preparing International Standards is normally carried out through ISO technical committees. Each member body interested in a subject for which a technical committee has been established has the right to be represented on that committee. International organizations, governmental and non-governmental, in liaison with ISO, also take part in the work. ISO collaborates closely with the International Electrotechnical Commission (IEC) on all matters of electrotechnical standardization.

The procedures used to develop this document and those intended for its further maintenance are described in the ISO/IEC Directives, Part 1. In particular the different approval criteria needed for the different types of ISO documents should be noted. This document was drafted in accordance with the editorial rules of the ISO/IEC Directives, Part 2 (see [www.iso.org/directives](http://www.iso.org/directives)).

Attention is drawn to the possibility that some of the elements of this document may be the subject of patent rights. ISO shall not be held responsible for identifying any or all such patent rights. Details of any patent rights identified during the development of the document will be in the Introduction and/or on the ISO list of patent declarations received (see [www.iso.org/patents](http://www.iso.org/patents)).

Any trade name used in this document is information given for the convenience of users and does not constitute an endorsement.

For an explanation on the meaning of ISO specific terms and expressions related to conformity assessment, as well as information about ISO's adherence to the WTO principles in the Technical Barriers to Trade (TBT) see the following URL: Foreword - Supplementary information

The committee responsible for this document is ISO/TC 46, *Information and documentation*, Subcommittee SC 8, *Quality — Statistics and performance evaluation*.

This fifth edition cancels and replaces the fourth edition (ISO 2789:2006), which has been technically revised to overcome problems in the practical application of ISO 2789:2006 and to take account of the new developments in library services.

## Introduction

This International Standard provides guidance to the library and information services community on the collection and reporting of statistics.

[Clauses 2](#) and [6](#) form the core of this International Standard. [Clause 2](#) provides definitions for most of the elements which constitute a library service; these are for statistical purposes only. [Clause 6](#) recommends how each of these elements should be counted. Users will need to consult both clauses for the complete picture.

This International Standard includes definitions and counting procedures for all types of resources and services that libraries offer to their users. The former [Annex A](#), including definitions and procedures for electronic resources and services, has been integrated into the main part of the standard, as these resources and services have become a normal part of library activities.

In order to explain the reasons for incorporating a number of new library services into this International Standard, [Clause 3](#) has been added to describe the current tasks of libraries.

It is recognized that not all measures specified in this International Standard can be collected by libraries of different types and sizes. To give greater completeness, several additional measures (important for some sectors only) are described in [Annex A](#). The aim is to ensure that, where a particular statistic is collected, the same definitions and methods are used.

[Annex B](#) is important for the compilation and publication of national statistics so that they can be truly comparable between countries and over time.

The strong requirement to describe and publicize library activities can only be satisfied if data collection in libraries follows the lines of this International Standard. As far as possible, it is advisable that libraries collect all data named in this International Standard that concern their activities.

Developments in relation to this International Standard will be monitored and additional statistical measures will be incorporated as needed.

An alphabetical index is given in [Annex C](#).





# Information and documentation — International library statistics

## 1 Scope

This International Standard specifies rules for the library and information services community on the collection and reporting of statistics:

- for the purposes of international reporting;
- to ensure conformity between countries for those statistical measures that are frequently used by library managers, but do not qualify for international reporting;
- to encourage good practice in the use of statistics for the management of library and information services.

## 2 Terms and definitions

For the purposes of this document, the following terms and definitions apply.

### 2.1 Libraries

#### 2.1.1

##### **academic library**

library whose primary function is to cover the information needs of learning and research

Note 1 to entry: This includes libraries of institutions of higher education and general research libraries.

#### 2.1.2

##### **administrative unit**

any independent library, or group of libraries, under a single directorate or a single administration

Note 1 to entry: The term “independent” does not imply legal or financial independence but only that the library is a recognizably separate unit, typically within a larger organization.

Note 2 to entry: The administrative unit can be a single library or a larger organization, typically containing a central/main library, branch libraries and administrative functions. See the Example in [6.1.1](#).

#### 2.1.3

##### **branch library**

part of a larger administrative unit providing, in separate quarters, a service for a particular user group (e.g. children, faculties) or for a locally defined clientele

Note 1 to entry: Institute, departmental and other affiliated libraries are included. Mobile libraries and external service points are excluded.

#### 2.1.4

##### **central library**

##### **main library**

usually that part or those parts of an administrative unit where the main administrative functions and the important parts of the library collection and services are located

Note 1 to entry: An administrative unit comprising several branch libraries does not necessarily include a central library.

### 2.1.5

#### **external service point**

point away from library premises at which a certain service is regularly offered to users

Note 1 to entry: This includes places within a locality at which library material is deposited for informal circulation to a restricted group of users but without other library services, for example, old people's homes, community centres, collections for hospital patients.

Note 2 to entry: This includes service points that offer electronic services, but no print collections.

Note 3 to entry: Mobile libraries and their stops are not counted as external service points.

Note 4 to entry: A simple computer connection to a place outside the library (e.g. in a students' residence hall) is not counted as an external service point.

### 2.1.6

#### **library**

organization, or part of an organization, the main aim of which is to facilitate the use of such information resources, services and facilities as are required to meet the informational, research, educational, cultural or recreational needs of its users

Note 1 to entry: The supply of the required information resources can be accomplished by building and maintaining a collection and/or by organizing access to information resources.

Note 2 to entry: These are the basic requirements for a library and do not exclude any additional resources and services incidental to its main purpose.

### 2.1.7

#### **library of an institution of higher education**

library whose primary function is to serve students, academic and professional staff in universities and other institutions of education at the third (tertiary) level and above

Note 1 to entry: It may also serve the general public.

### 2.1.8

#### **mobile library**

library, sometimes a division of a public library, using transport means to provide documents and services directly to users as an alternative to access on library premises

Note 1 to entry: Adapted from ISO 5127:2001.

### 2.1.9

#### **national library**

library that is responsible for acquiring and conserving copies of all relevant documents published in the country in which the library is located

Note 1 to entry: A national library will also normally perform some or all of the following functions: produce the national bibliography; hold and keep up to date a large and representative collection of foreign literature including documents about the country; act as a national bibliographic information centre; compile union catalogues; supervise the administration of other libraries and/or promote collaboration; coordinate a research and development service; etc.

Note 2 to entry: The definition of "national library" allows for more than one national library in a country.

#### **2.1.10**

##### **public library**

general library that is open to the public and that serves the whole population of a local or regional community and is usually financed, in whole or in part, from public funds

Note 1 to entry: A public library is defined as open to the public, even if its services are primarily intended for a particular part of the population to be served, such as children, visually impaired persons, or hospital patients. Its basic services are free of charge or available for a subsidized fee. This definition includes services provided to schools by a public library organization and services provided to public libraries in a region by a regional organization.

#### **2.1.11**

##### **school library**

library attached to all types of schools below the third (tertiary) level of education whose primary function is to serve the pupils and teachers of such a school

Note 1 to entry: A school library may also serve the general public.

Note 2 to entry: This includes libraries and resource collections in all educational institutions below the third level, which may be described as “Colleges”, “Colleges of Further Education”, “Vocational Institutes”, etc.

#### **2.1.12**

##### **special library**

independent library covering one discipline or particular field of knowledge or a special regional interest

Note 1 to entry: The term “special library” includes libraries primarily serving a specific category of users, or primarily devoted to a specific form of document, and libraries sponsored by an organization to serve its own work-related objectives.

Note 2 to entry: The statistics of special libraries should be collected and presented separately for those in the areas given in [2.1.12.1](#) to [2.1.12.7](#) (differentiated according to funding institutions).

##### **2.1.12.1**

###### **government library**

library maintained to serve any government service, department or agency, or parliament, including both international, national and local (regional) government organizations

##### **2.1.12.2**

###### **health-service library**

###### **medical library**

library which serves health-service professionals in hospitals or elsewhere, whether in the private or public sector

Note 1 to entry: Pharmaceutical company libraries should be included under [2.1.12.4](#).

Note 2 to entry: These libraries may also include materials for patients.

##### **2.1.12.3**

###### **library of professional and learned institutions and associations**

library maintained by professional or trade associations, learned societies, trade unions and other similar bodies, whose primary objective is to provide services to the members and practitioners of a specific trade or profession

##### **2.1.12.4**

###### **industrial and commercial library**

library in any industrial enterprise or business firm, maintained by the parent organization to serve the information needs of its staff

Note 1 to entry: The term “industrial and commercial library” includes libraries maintained by information and management consultants, manufacturing and service industries and libraries of commercial legal practices.

#### 2.1.12.5

##### **media library**

library serving media and publishing firms and organizations, including newspapers, publishers, broadcasting, film and television

#### 2.1.12.6

##### **regional library**

major library serving a particular region whose primary function cannot be described as that of a public, school or academic library nor as part of a national library network

#### 2.1.12.7

##### **other special library**

any library not included elsewhere

EXAMPLE Library within voluntary organizations, museums, religious institutions.

#### 2.1.13

##### **storage library**

library whose primary function is to store less-used material from other administrative units

Note 1 to entry: Storage libraries that are part of or administrated by another library (e.g. national or regional library) are excluded.

Note 2 to entry: Libraries whose stock remains the possession of the storing libraries are excluded. The collections and their use are counted with the proprietary libraries.

## 2.2 Library services and use

### 2.2.1

#### **access**

successful request of a library-provided online service

Note 1 to entry: An access is one cycle of user activities that typically starts when a user connects to a library-provided online service and ends by a terminating activity that is either explicit (by leaving the database through log-out or exit) or implicit (timeout due to user inactivity).

Note 2 to entry: Accesses to the library website are counted as virtual visits.

Note 3 to entry: Requests of a general entrance or gateway page should be excluded.

Note 4 to entry: If possible, requests by search engines should be excluded.

### 2.2.2

#### **active borrower**

registered user who has borrowed at least one item during the reporting period

Note 1 to entry: This count underrates the number of active users, but is still for many libraries the only manageable measure.

### 2.2.3

#### **active user**

registered user who has visited or made use of library facilities or services during the reporting period

Note 1 to entry: This includes active borrowers.

Note 2 to entry: This may include the use of electronic library services, if it is possible to identify electronic use and virtual visits of the individual user, or if data can be obtained by means of surveys.

Note 3 to entry: If a library identifies non-registered active users, e. g. by surveys, these should be counted separately.

**2.2.4**  
**blog**  
**weblog**

web page that provides frequent continuing publication of web links and/or comments on a particular topic or subject (broad or narrow in scope), often in the form of short entries arranged in reverse chronological order, the most recently added piece of information appearing first

Note 1 to entry: The information can be written or collected by the site owner or contributed by users.

**2.2.5**  
**blog post**  
entry in a blog

**2.2.6**  
**download**

successful request of a content unit from a library-provided online service or other internet service

**2.2.7**  
**electronic document delivery, mediated**

electronic transmission of a document or part of a document from the library collection to a user, mediated by library staff, not necessarily via another library

Note 1 to entry: Electronic transmission of documents to members of the population to be served is included. Fax transmission is excluded.

Note 2 to entry: May be split up as to transmission with or without charge to the user.

Note 3 to entry: Unmediated downloading by users from the electronic collection of the library is excluded.

Note 4 to entry: The forms of lending and delivery services defined in this International Standard are shown in [Table 1](#).

**Table 1 — Forms of lending and delivery services**

Supplier		Library		Document supplier
Recipient		User	Other library	User (via library)
<b>Transmission format</b>	Original	Loan	ILL	EDS
	Print copy	Loan	ILL	EDS
	Electronic	Time-limited: Loan No time limit: EDD	EDD	EDS
ILL: Interlibrary lending. EDD: Electronic document delivery (mediated). EDS: External document supply.				

**2.2.8**  
**electronic service**

library service delivered via electronic means, whether from local servers or provided via networks

Note 1 to entry: Electronic library services include the online catalogue, the library website, the electronic collection, electronic lending, electronic document delivery (mediated), electronic reference service, user training by electronic means, services for mobile devices, services for interactive use (including services on social networks), and Internet access offered via the library.

Note 2 to entry: This does not include booking physical services (e.g. rooms or library tours) by electronic means.

### 2.2.9

#### **event**

pre-arranged activity with cultural, educational, social, political, scholarly, or other intent

EXAMPLE Exhibitions, author visits, literary discussions, workshops.

Note 1 to entry: Adapted from ISO/TR 28118:2009

Note 2 to entry: Only events arranged by the library on its own or in partnership with other institutions are included, whether inside or outside the library premises. Events inside the library premises organized by institutions outside the library without the library's cooperation are excluded.

Note 3 to entry: User training lessons and library tours are excluded.

Note 4 to entry: Ongoing programs are included. Each session of a program is counted as one event.

Note 5 to entry: Virtual events are included.

### 2.2.10

#### **exhibition**

time-limited display of objects, organized or co-organized by the library

Note 1 to entry: Exhibitions can take place inside or outside the library premises.

### 2.2.11

#### **external document supply**

document or part of it, in print or electronic form, delivered from outside the library collection by non-library suppliers (not through interlibrary lending) with the library being involved in the transaction and/or the payment

Note 1 to entry: It is irrelevant whether a number of individual transactions are paid per view or a certain number of transactions have been prepaid.

Note 2 to entry: The forms of lending and delivery services defined in this International Standard are shown in [Table 1](#).

### 2.2.12

#### **external user**

user of a library who does not belong to that library's population to be served

### 2.2.13

#### **informational question**

directional and/or administrative inquiry delivered to library staff

Note 1 to entry: This includes e.g. questions for locating staff or facilities, questions regarding opening times and registering procedures and questions about handling equipment such as printers or computer terminals.

Note 2 to entry: The question can be delivered personally or by means of telephone, regular mail, fax or electronic media (via email, the library website or other networked communication mechanisms).

Note 3 to entry: For reference questions, see [2.2.26](#)

### 2.2.14

#### **in-house use**

use of documents on the premises having been taken by a user from open access stock

Note 1 to entry: In-house use includes browsing at the shelves in the sense of a short investigation of the contents, but excludes looking at the side or spine titles only for selecting material.

### 2.2.15

#### **interactive library service**

online library service with social software that facilitates a bidirectional exchange of information among users or between users and the library

### 2.2.16

#### **interlibrary loan**

loan of a document in its physical form or delivery of a document, or part of it, in copied form, from one library to another which is not under the same administration

Note 1 to entry: Mediated transmission of documents in electronic form is counted as electronic document delivery.

Note 2 to entry: The forms of lending and delivery services defined in this International Standard are shown in [Table 1](#).

### 2.2.17

#### **Internet access**

Internet connection by a user from a workstation owned by the library or from a user's private computer in the library via the library's network

Note 1 to entry: Internet accesses can only be counted if users have registered or authenticated themselves when accessing the Internet.

Note 2 to entry: Internet access via a user's private computer (e.g. laptop or handheld) via the library's wireless network inside the library should be counted and reported separately.

### 2.2.18

#### **library website**

unique domain on the Internet consisting of a collection of web pages that is published by a library to provide access to the library's services and resources

Note 1 to entry: The pages of a website are usually interconnected by the use of hypertext links.

Note 2 to entry: Excludes documents that fit the definitions of electronic collection and free Internet resources that may be linked from the library website.

Note 3 to entry: Excludes web services in the library's domain that are operated on behalf of other organizations.

### 2.2.19

#### **loan**

direct lending or delivery transaction of an item in non-electronic form (e.g. book), of an electronic document on a physical carrier (e.g. CD-ROM) or other device (e.g. eBook reader), or transmission of an electronic document to one user for a limited time period (e.g. eBook)

Note 1 to entry: Renewals are excluded, but could be counted separately.

Note 2 to entry: Loans include registered loans within the library (on-site loans).

Note 3 to entry: Loans include copied documents supplied in place of original documents (including fax) and printouts of electronic documents made by library staff for the user.

Note 4 to entry: Loans of documents in physical form to distance users are included.

Note 5 to entry: Mediated electronic transmission of documents is counted as electronic document delivery if their use is permitted for unlimited time. This includes transmissions to members of the population to be served.

Note 6 to entry: The forms of lending and delivery services defined in this International Standard are shown in [Table 1](#).

### 2.2.20

#### **mobile device**

computing device, typically having a display screen with touch, pen and/or keyboard input and Internet connection

### 2.2.21

#### **online catalogue**

database of bibliographical records describing the collection usually of one particular library or library system

#### 2.2.22

##### **on-site loan**

document delivered, in most cases from closed access, for use on the premises

#### 2.2.23

##### **podcast**

digital media file (audio or video) syndicated over the Internet via an RSS feed

Note 1 to entry: Once available online, podcasts can be downloaded for listening or viewing on portable media devices and personal computers.

Note 2 to entry: Online directories of podcasts are usually browsable by subject and searchable by keyword(s).

#### 2.2.24

##### **point-of-use training**

unstructured user training conducted by library staff at the impromptu request of users and usually at their point of use

#### 2.2.25

##### **population to be served**

number of individuals for whom the library is set up to provide its services and materials

Note 1 to entry: Adapted from ISO 11620:2008.

Note 2 to entry: For public libraries, this will normally be the population of the legal service area (authority); for libraries of an institution of higher education, this will normally be the total of academic and professional staff plus students.

#### 2.2.26

##### **reference question**

information contact that involves the knowledge or use of one or more information sources (such as printed and non-printed materials, machine-readable databases, the library's own and other institutions' catalogues) by library staff

Note 1 to entry: Adapted from ANSI/NISO Z39.7-2004.

Note 2 to entry: This may also involve recommendations, interpretation, or instruction in the use of such sources.

Note 3 to entry: One reference question may address several issues.

Note 4 to entry: The question can be delivered personally or by means of telephone, regular mail, fax or electronic media (via email, the library website or other networked communications mechanisms).

Note 5 to entry: It is essential that libraries do not include informational (directional and administrative) questions, e.g. for locating staff or facilities, regarding opening times or about handling equipment such as printers or computer terminals (see [2.2.13](#)).

#### 2.2.27

##### **reference service**

provision of information and assistance, in response to requests, by an information and documentation organization

[SOURCE: ISO 5127:2001, definition 5.5.06]

#### 2.2.28

##### **registered user**

person or organization registered with a library in order to use its collection and/or services within or away from the library

Note 1 to entry: Users may be registered upon their request or automatically when enrolling in the institution.

Note 2 to entry: The registration should be monitored at regular intervals, minimum every three years, so that inactive users can be removed from the register.



**2.2.29**  
**rejected access**  
**turnaway**

unsuccessful request of a licensed online service provided by the library by exceeding the simultaneous user limit

Note 1 to entry: Request failure because of wrong passwords is excluded.

**2.2.30**  
**renewal**

extension of the loan period for a document usually initiated by the user

Note 1 to entry: Automatic renewals generated by the library system without user interaction are included.

**2.2.31**  
**reservation**

action taken when a user requests the supply of a document that is in the library collection or in the process of acquisition but not available at the time

**2.2.32**  
**search**

specific intellectual query, typically equated to submitting a search form of a library-provided online service to the server

Note 1 to entry: Adapted from COUNTER code of practice, Release 4, 2012.

Note 2 to entry: A search is recorded each time a search request is submitted to the server.

Note 3 to entry: Immediately repeated duplicate searches, double clicks, or other evidence indicating unintended user behaviour are excluded.

**2.2.33**  
**social network service**

electronic service designed to allow users to establish a personal or organizational profile and contact other individuals for the purpose of communicating, collaborating, and/or sharing content with them

Note 1 to entry: Users can be individual persons or institutions such as libraries.

Note 2 to entry: Most services allow members to restrict the visibility of their profile information to registered service members only, people on an established list of contacts, or particular groups of service users.

**2.2.34**  
**target population**

groups of actual and potential users appropriate to an individual library as the object of a specific service or as the primary users of specific materials

[SOURCE: ISO 11620:2008, definition 2.4.1]

**2.2.35**  
**target population with special needs**

part of a library's population to be served with needs that require special library services

Note 1 to entry: The special needs can be caused by physical and health impairment, economic disadvantage (e.g. long-term unemployment), cultural difference (e.g. non-native speakers, new arrivals), educational background, or other circumstances that require special library services.

Note 2 to entry: Children, young people and seniors without additional needs are not included.

Note 3 to entry: A library may have more than one target population with special needs.

Note 4 to entry: An individual may belong to more than one such target population.

### 2.2.36

#### **user**

recipient of library services

[SOURCE: ISO 11620:2008, definition 2.43]

Note 1 to entry: The recipient can be a person or an institution, including libraries.

Note 2 to entry: Library services include electronic services, physical services and visiting the library premises.

### 2.2.37

#### **user training**

training programme set up with a specified lesson plan, which aims at specific learning outcomes for the use of library and other information services

Note 1 to entry: User training can be offered as a tour of the library, as library tuition, or as a web-based service for users.

Note 2 to entry: The duration of lessons is irrelevant.

### 2.2.38

#### **virtual event**

event in electronic format, specially designed for use via the Internet

### 2.2.39

#### **virtual visit**

one continuous cycle of user activities on the library website by users from outside the library's IP address space (usually from outside the library premises), regardless of the number of pages or elements viewed

Note 1 to entry: A virtual visit typically starts when a user accesses the library website after visiting an external page, and ends if no activity has been recorded for a defined period of time (a maximum of 30 minutes). Another access after a longer interval initiates a new visit.

Note 2 to entry: A virtual visitor should at least be identified by a unique cookie and/or by a unique combination of the user's IP address and browser string (user agent). Known web spiders and harvesters should be excluded.

### 2.2.40

#### **visit**

person (individual) entering the library premises

### 2.2.41

#### **wiki**

web application that allows users to add content to a collaborative hypertext web resource (co-authoring), and permits others to edit that content (open editing)

Note 1 to entry: Authorizations and passwords are not necessarily required.

Note 2 to entry: A wiki may have policies to govern editing and procedures for handling edit wars.

## 2.3 Collections

### 2.3.1

#### **access rights**

rights for reaching or using the library collection

Note 1 to entry: For the electronic collection, this implies that the library has secured permanent or temporary access for its users by law, licence or other contractual and/or cooperative agreement.

**2.3.2**  
**addition**  
**acquisition**

document or item added to a collection during the reporting period

Note 1 to entry: Additions can be obtained, for example, by purchase, licensing, legal deposit, digitization, donation or exchange.

**2.3.3**  
**audiovisual document**

document in which sound and/or pictures are prominent, and which requires the use of special equipment to be seen and/or heard

Note 1 to entry: Adapted from ISO 5127:2001

Note 2 to entry: This includes audio documents such as records, tapes, cassettes, audio compact discs, DVDs, files of digital audio recordings; visual documents such as slides, transparencies; and combined audiovisual documents, such as motion pictures, video recordings, computer games.

Note 3 to entry: Microforms are excluded.

**2.3.4**  
**book**

non-serial printed document in codex form

**2.3.5**  
**born digital document**

document that has been created originally in digital form.

**2.3.6**  
**cartographic document**

conventional representation, on a reduced scale, of concrete or abstract phenomena which can be localized in space and time

Note 1 to entry: Adapted from “map” in ISO 5127:2001.

Note 2 to entry: This includes documents such as two- and three-dimensional maps, globes, plans, topographic models, tactile maps and aerial representations, but excludes atlases and any other cartographic documents in codex, micro, audiovisual and electronic form.

**2.3.7**  
**commercial publication**

document in print or electronic format that is generally produced and sold (distributed) for the purpose of profit

**2.3.8**  
**compact disc read-only memory**  
**CD-ROM**

computer-based information storage and retrieval medium based on laser technology that contains data in text and/or multimedia formats

Note 1 to entry: CD-ROMs are only counted according to their contents as database, digital document, or electronic serial.

**2.3.9**  
**content unit**

computer-processed uniquely identifiable textual or audio-visual piece of published work that may be original or a digest of other published work

Note 1 to entry: This includes documents or parts of documents (e.g. articles, abstracts, content tables, images) and descriptive records.

Note 2 to entry: Adapted from COUNTER code of practice, Release 3:2008

Note 3 to entry: PDF, Postscript, HTML and other formats of the same content unit will be counted as separate items.

### **2.3.10 database**

collection of electronically stored descriptive records or content units (including facts, texts, pictures, and sound) with a common user interface and software for the retrieval and manipulation of the data

Note 1 to entry: The units or records are usually collected with a particular intent and are related to a defined topic. A database may be issued on CD-ROM, diskette, or other direct-access method, or as a computer file accessed via dial-up methods or via the Internet.

Note 2 to entry: Licensed databases are counted separately even if access to several licensed database products is effected through the same interface.

Note 3 to entry: A common interface providing access to a packet of serials or digital documents, usually offered by a publisher or vendor, is also to be counted as database. Additionally, the single serials or digital documents should be counted as serials or digital documents.

### **2.3.11 dataset**

logically meaningful collection or grouping of similar or related data, usually assembled as a matter of record or for research

Note 1 to entry: The data can be numeric, text-based, audiovisual or mixed.

### **2.3.12 descriptive record**

computer-processed bibliographic or other individual record in a standard format that references and/or describes a document in any physical form or a content unit

Note 1 to entry: A collection of descriptive records is usually published in the form of a database.

Note 2 to entry: The record can include elements such as title, author, subject, abstract, date of origin.

### **2.3.13 digital document**

information unit with a defined content, born digital or digitized, that has been created or digitized by the library or acquired in digital form as part of the library collection

Note 1 to entry: This includes eBooks, electronic patents, networked audiovisual documents and other digital documents, e.g. reports, cartographic and music documents, preprints, etc. Databases and electronic serials are excluded.

Note 2 to entry: Items incorporated in databases are covered by [2.3.10](#).

Note 3 to entry: A digital document can be structured into one or more files.

Note 4 to entry: A digital document consists of one or more content units. Before digitization, the library must decide which content units should be searchable afterwards, e.g. articles in serials, or songs on records.

### **2.3.14 digital preservation**

storage, maintenance, and access to a digital object over a long time, usually involving applying one or more preservation strategies

[SOURCE: ISO/TS 21547:2010, definition 3.1.7]

### **2.3.15 digitization**

process of converting analogue materials into digital form

Note 1 to entry: Digitization for document supply from the library collection to a user or institution is excluded.

Note 2 to entry: Digitization for preservation purposes is included.

Note 3 to entry: Mass digitization is included.

Note 4 to entry: Purchase of electronic copies for replacing print copies is excluded.

### **2.3.16**

#### **digitized collection**

part of the electronic collection containing those items that have been digitized from the analogue collection of the library

### **2.3.17**

#### **document**

recorded information or material object, which can be treated as a unit in a documentation process

[SOURCE: ISO 5127:2001, definition 1.2.02]

Note 1 to entry: Documents can differ in form and characteristics.

### **2.3.18**

#### **DVD**

#### **digital versatile disk**

type of optical storage medium of the same size as a compact disk, but with significantly greater recording capacity

### **2.3.19**

#### **eBook**

#### **electronic book**

non-serial digital document, licensed or not, where searchable text is prevalent, and which can be seen in analogy to a print book (monograph)

Note 1 to entry: The use of eBooks is, in many cases, dependent on a dedicated device and/or a special reader or viewing software.

Note 2 to entry: eBooks can be lent to users either on portable devices (eBook readers) or by transmitting the contents to the user's PC or other device for a limited time period.

Note 3 to entry: Doctoral dissertations in electronic format are included.

Note 4 to entry: Documents digitized by the library are included.

### **2.3.20**

#### **eBook reader**

electronic device that is designed primarily for the purpose of reading eBooks and electronic periodicals

### **2.3.21**

#### **electronic collection**

all resources in electronic form in the library collection, whether born digital or digitized

Note 1 to entry: The electronic collection includes databases, electronic serials, and digital documents. Free Internet resources which have been catalogued by the library in its online catalogue or a database should be counted separately (see [6.3.15](#)).

Note 2 to entry: The resources can be networked, installed on stand-alone workstations or stored on physical carriers.

### **2.3.22**

#### **electronic serial**

serial published in electronic form only or in both electronic and another format

Note 1 to entry: Comprises serials held locally and remote resources for which access rights have been acquired, at least for a certain period of time.

Note 2 to entry: Serials digitized by the library are included.

Note 3 to entry: Open access journals are regarded as free Internet resources (see [2.3.23](#)).

### 2.3.23

#### **free Internet resource**

Internet resource with unrestricted (open) access for which no payment is required

### 2.3.24

#### **government document**

document published at government expense or as required by law or by an international agency (e.g. United Nations, European Union, UNESCO)

Note 1 to entry: Patents are dealt with in [2.3.42](#). Other government documents are counted in accordance with their format (see A.3.3.).

### 2.3.25

#### **graphic document**

print document in which pictorial representation is the most prominent feature

Note 1 to entry: This is pictorial rather than linguistic, musical or cartographic in form. It includes art prints, art originals, art reproductions, photographs, posters, study prints, technical drawings, etc., but excludes graphic items in codex form or in microform, audiovisual or electronic form.

### 2.3.26

#### **institutional repository**

open access repository for storing the publications of an institution, or a group of institutions, such as e-prints, technical reports, theses and dissertations, datasets, and teaching and learning materials

### 2.3.27

#### **kit**

set of related materials in more than one medium, designed to be used as a unit with no single medium predominating, often stored in a container to keep the parts together

Note 1 to entry: Includes laboratory kits and packages of curriculum materials.

Note 2 to entry: Kits are counted as other library documents, see [6.3.10](#).

### 2.3.28

#### **library collection**

all documents provided by a library for its users

Note 1 to entry: This comprises information resources held locally and remote resources for which access rights have been acquired.

Note 2 to entry: Access rights can be acquired by the library itself, by a consortium and/or through external funding.

Note 3 to entry: Acquisition is to be understood as deliberately selecting a document, securing access rights and including it in the online catalogue or other databases of the library. Interlibrary lending and document delivery are excluded.

Note 4 to entry: Does not include links to Internet resources for which the library has not secured access rights by legal agreements (e.g. legal deposit right), licence or other contractual and/or cooperative agreement. Free Internet resources which have been catalogued by the library in its online catalogue or a database should be counted separately (see [6.3.15](#)).

Note 5 to entry: Documents in institutional repositories are not included, but should be counted separately if the library is involved in collecting the items and/or operating the repository (see A.3.6).

### 2.3.29

#### **manuscript**

original document that is handwritten or in typescript

Note 1 to entry: Bound volumes and other units (fragments, rolls, autographs, etc.) may be counted separately.

### 2.3.30

#### **microform**

photographic document requiring magnification when used

Note 1 to entry: Adapted from ISO 5127:2001.

Note 2 to entry: Microfiche and microfilm are included.

Note 3 to entry: Slides and similar documents are counted as audiovisual documents.

### 2.3.31

#### **monograph**

publication in print or non-print form, either complete in one volume or complete, or intended to be completed, in a finite number of volumes

[SOURCE: ISO 5127:2001, definition 2.4.02]

### 2.3.32

#### **monographic series**

set of monographs related to other monographs through the addition of a collective title

[SOURCE: ISO 9707:2008, definition 3.20]

### 2.3.33

#### **multimedia document**

document combining different information media (e.g. text, graphics, photos, video, audio) for interactive use, in digital format

Note 1 to entry: Multimedia documents are counted according to their main features or purposes e.g. as a database, an electronic serial or a digital document.

### 2.3.34

#### **national collection**

national library's collection of the national imprint and the national documentary heritage in the form of manuscripts, archival materials, cartographic material, printed music documents, pictures, photographs and audiovisual documents in traditional or electronic format

[SOURCE: ISO/TR 28118:2009, definition 2.36]

Note 1 to entry: The national collection can include the archived content of the national domain on the web.

### 2.3.35

#### **national imprint**

all documents in all formats published in a country

Note 1 to entry: Includes commercial and non-commercial publications.

[SOURCE: ISO/TR 28118:2009, definition 2.37]

### 2.3.36

#### **newspaper**

serial, which contains news on current events of special or general interest, the individual parts of which are listed chronologically or numerically and usually appear at least once a week

Note 1 to entry: Electronic newspapers are included.

### 2.3.37

#### **non-commercial publication**

document in all formats published by non-profit institutions, such as communities, associations, initiatives, often not available through normal book trade channels

Note 1 to entry: Non-commercial publications can include reports, theses and dissertations, periodicals, conference proceedings, etc.

Note 2 to entry: Adapted from ISO/TR 28118:2009.

### 2.3.38

#### **open access**

unrestricted access to information, documents or information services

[SOURCE: ISO 5127:2001, definition 5.2.11]

Note 1 to entry: In a narrower sense, this means that information content is made freely available via the Internet.

### 2.3.39

#### **open access repository**

digital archive created and maintained to provide universal and free access to information content

Note 1 to entry: In most cases the repository is maintained by an institution of higher education or research as a means of facilitating research and scholarship.

Note 2 to entry: The archive can also contain material for which access is restricted, at least for a certain period.

### 2.3.40

#### **other digital document**

digital document other than an eBook, electronic serial, networked audiovisual document or electronic patent, e.g. report, preprint, cartographic or music document, language course, etc., in electronic format

Note 1 to entry: This includes both digitized documents and born digital documents.

### 2.3.41

#### **other library document**

non-electronic document or item other than a book, serial, manuscript, printed music document, microform, cartographic, audiovisual, graphic document, patent separately specified in this International Standard

Note 1 to entry: This includes items such as dioramas and other three-dimensional documents, games, kits, toys, etc. Documents in Braille are counted as print documents.

### 2.3.42

#### **patent**

government document granting an inventor the sole right to use or license an invention, together with associated documentation

### 2.3.43

#### **periodical**

serial under the same title published at regular or irregular intervals, over an indefinite period, individual issues in the series being numbered consecutively or each issue being dated

Note 1 to entry: Adapted from ISO 9707:2008.

Note 2 to entry: Series of reports, transactions of institutions, series of regular conference proceedings and annuals are included, while newspapers and monographic series are excluded.

Note 3 to entry: Electronic periodicals are included.

### 2.3.44

#### **physical unit**

physically coherent document unit, inclusive of any protective devices, freely movable against other document units

Note 1 to entry: Coherence may be achieved, for example, by binding or encasement.

Note 2 to entry: For printed documents, the term "volume" is used for the physical unit (see also [2.3.50](#)).



### 2.3.45

#### **printed music document**

document, the essential content of which is a representation of music, normally by means of notes

Note 1 to entry: Printed music documents can be in sheet or codex form.

### 2.3.46

#### **rare book**

book published before 1800 or newer book that is made precious by its limited issue, by its binding, by dedications, or by similar characteristics

Note 1 to entry: Usually such items will belong to special collections with special shelf marks and will be shelved separately in a secure location to which access is restricted.

### 2.3.47

#### **serial**

document in print or in non-print form, issued in successive parts, usually having numerical or chronological designations, and intended to be continued indefinitely, whatever its periodicity

Note 1 to entry: Adapted from ISO 5127:2001.

Note 2 to entry: Monographic series are excluded and should be counted as books.

### 2.3.48

#### **stock**

number of documents of a certain type (e.g. books and serials, microforms, electronic serials) held locally or in remote resources for which access rights have been acquired, at least for a certain period of time

Note 1 to entry: To be measured at the end of the reporting period.

### 2.3.49

#### **title**

words at the head of a document thus identifying it and normally distinguishing it from others

[SOURCE: ISO 5127:2001, definition 4.2.1.4.01]

Note 1 to entry: For measuring purposes, "title" describes a document, which forms a separate item with a distinctive title, whether issued in one or several physical units, and disregarding the number of copies of the document held by the library.

### 2.3.50

#### **volume**

physical unit for a printed document assembling a certain number of leaves under one cover to form a whole or part of a set

Note 1 to entry: Adapted from ISO 5127:2001.

### 2.3.51

#### **withdrawal**

document or item withdrawn from a collection during the reporting period

Note 1 to entry: Withdrawals can be effected, for example, by discarding, transferring or, in the case of electronic resources, by deletion of files or cancelling licences.

## 2.4 Access and facilities

### 2.4.1

#### **closed stacks**

stacks that are not accessible to users

Note 1 to entry: Antonym: **open stacks**

[SOURCE: ISO/TR 11219:2012, definition 3.19]

#### 2.4.2

##### **gross floor area**

sum of all floor areas of all levels of a building

Note 1 to entry: Includes the usable area, circulation space, the functional space and the space occupied by the constructional elements of the building (pillars, internal walls, etc.).

#### 2.4.3

##### **lending area**

library service area for supplying and returning books and other media for loan

[SOURCE: ISO/TR 11219:2012, definition 3.39]

#### 2.4.4

##### **national bibliography**

bibliography in which documents published in a single country are recorded and described

Note 1 to entry: In some countries, the national bibliography also covers publications relative to the country that are published abroad, including translations and works by their nationals.

[SOURCE: ISO 9707:2008, definition 2.21]

#### 2.4.5

##### **network**

##### **computer network**

collection of computers and devices interconnected by communications channels that facilitate communications among users and allow users to share resources and services

#### 2.4.6

##### **open stacks**

stacks that are accessible to users

Note 1 to entry: Antonym: **closed stacks**

[SOURCE: ISO/TR 11219:2012, definition 3.54]

#### 2.4.7

##### **opening hours**

hours in a normal week when the main physical services of the library (e.g. reference and loan services, reading rooms) are available to users

#### 2.4.8

##### **public access workstation**

library-owned computer workstation, networked or stand alone, including those placed externally to the library, and those whose acquisition and/or maintenance has, in part or fully, been sponsored by or donated to the library

Note 1 to entry: Adapted from ANSI/NISO Z39.7:2004.

#### 2.4.9

##### **unstaffed opening hours**

hours when a library, or a specified library area, is open to controlled access, without staff present but with facilities for self-service

Note 1 to entry: Access may be restricted to a specified part of the population to be served, e.g. researchers and postgraduate students.

#### **2.4.10**

##### **usable area**

part of the gross floor area, which serves the main purpose of the building

Note 1 to entry: Includes space for user services (including areas for recreation and communication), materials storage, library management and technical services, events, exhibitions and meetings, equipment areas, aisles, toilets and janitorial areas, and all other space used for library resources and services.

Note 2 to entry: Excludes circulation areas (corridors, stairway space, lift shafts and traffic area for vehicles).

Note 3 to entry: Excludes the functional space that houses the central operational equipment of a building (e.g. sewage disposal, heating, conveyor technique).

#### **2.4.11**

##### **user place**

place provided for users for reading or studying, whether with or without seating or equipment

Note 1 to entry: Includes places in carrels, in seminar and study rooms, and in the audiovisual and children's departments of the library, and informal seating in lounges, group areas, etc.

Note 2 to entry: Excludes places in halls, lecture and auditory theatres intended for audiences of special events. Also excludes floor space and cushions on which users may sit.

### **2.5 Management**

#### **2.5.1**

##### **conservation**

intervention techniques applied to prevent, arrest or delay deterioration

[SOURCE: ISO 5127:2001, definition 6.1.03]

#### **2.5.2**

##### **cooperative project**

institutionalized and/or specially funded library project in cooperation with one or more partners

Note 1 to entry: Partners in cooperative projects can be libraries, archives, museums, departments in universities or communities, or other institutions.

Note 2 to entry: The projects can be organized on a local, regional, national, or international basis.

Note 3 to entry: Ad hoc cooperation should be excluded.

Note 4 to entry: A one-way relationship, whether paid or unpaid, where one partner is only supplying and the other only receiving services, is excluded.

Note 5 to entry: Cooperation between two or more libraries within a single administrative unit is excluded.

#### **2.5.3**

##### **library research**

systematic study and analysis of some aspect of library and information science

Note 1 to entry: The results are usually published in a journal of library and information science or presented at a library and information conference.

#### **2.5.4**

##### **library staff research publication**

research publication by library staff in professional and academic subjects

Note 1 to entry: Includes publications in all formats, and presentations at conferences.

### 2.5.5

#### **partnership**

ongoing, formalized cooperation between a library and one or more other organizations, including other libraries, usually concerning particular services or activities

Note 1 to entry: A partnership will usually have a contractual basis. Partners may make different contributions, e.g. expertise, funding, training, materials in kind, premises.

Note 2 to entry: Cooperation between two or more libraries within a single administrative unit is excluded.

Note 3 to entry: Time-limited cooperation on a specified project is excluded and counted as a cooperative project (see [2.5.2](#)).

Note 4 to entry: A one-way relationship, whether paid or unpaid, where one partner is only supplying and the other only receiving services, is excluded.

### 2.5.6

#### **preservation**

all measures taken, including financial and strategic decisions, to maintain the integrity and extend the life of documents or collections

[SOURCE: ISO 5127:2001, definition 6.1.01]

### 2.5.7

#### **project**

unique process, consisting of a set of coordinated and controlled activities with start and finish dates, undertaken to achieve an objective conforming to specific requirements, including the constraints of time, cost and resources

Note 1 to entry: An individual project can form part of a larger project structure.

Note 2 to entry: Adapted from ISO 9000:2005.

### 2.5.8

#### **publishing by libraries**

publishing activities of libraries, issuing documents for sale or licensing to the public in analogue or digital format

Note 1 to entry: Publishing activities include peer review, contracting with authors and service providers, editing manuscripts, designing and producing the item, marketing, dissemination, copyright management, advice and consulting, etc.

Note 2 to entry: Placing finished documents into institutional repositories is not included.

### 2.5.9

#### **restoration**

actions taken to return a document which has suffered deterioration or damage as closely as practicable to its original state

Note 1 to entry: In archival restoration, no attempt is made to recreate missing text, etc., and all restoration work is kept clearly evident.

[SOURCE: ISO 5127:2001, definition 6.1.04]

## 2.6 Funding and expenditure

### 2.6.1

#### **capital expenditure**

expenditure which results in the acquisition of, or addition to, fixed assets

Note 1 to entry: This includes expenditure on building sites, new buildings and extensions, furnishings and equipment for new and expanded buildings, computer systems (hardware and software), etc. When applicable, local and national sales/purchase taxes [e.g. Value Added Tax (VAT)] are included.

## 2.6.2

### **open access publishing fees**

fees levied by publishers to permit open access to research outputs, usually journal articles

Note 1 to entry: Fees could be paid by authors, research funders or institutions.

Note 2 to entry: Charges for features such as colour reproduction, figures, photographs, etc., are excluded.

## 2.6.3

### **operating expenditure**

#### **ordinary expenditure**

expenditure incurred in the running of a library

Note 1 to entry: This is money spent on staff and on resources that are used and replaced regularly (see ISO 11620). This includes expenditure on employees, rent, acquisitions and licensing, binding, computer network (operations and maintenance), telecommunication, building, maintenance, utilities (electricity, water, sewage, heating, etc.), repair or replacement of existing furnishings and equipment, events, etc. This can also be termed 'current' or 'recurrent' expenditure. When applicable, local and national sales/purchase taxes [e.g. Value Added Tax (VAT)] are included.

## 2.6.4

### **special grant**

grant of a non-recurrent nature to fund (or partly fund) projects

## 2.7 Library staff

### 2.7.1

#### **library employee**

person who works for a library in return for payment

### 2.7.2

#### **other staff**

all other library employees without formal qualifications in librarianship/information science or other relevant specialization

### 2.7.3

#### **professional education**

formal training of students/trainees in librarianship and/or information sciences or related fields that is undertaken by the library, in most cases in conjunction with a library school or similar institution

Note 1 to entry: The level of qualification will differ between countries.

### 2.7.4

#### **professional staff**

library employee who has received training in librarianship and/or information science and whose duty requires professional education or experience

Note 1 to entry: The training can be by formal education or by means of an extended period of work of a professional nature, in a library, under supervision.

### 2.7.5

#### **qualified specialist staff**

library employee who has received training in a specialist discipline other than librarianship and/or information science

Note 1 to entry: The training can be by formal education or by means of an external period of work of a professional nature under supervision in a specialization such as accountancy, computing, staff management, bookbinding, etc.

### 2.7.6

#### **staff training**

formal pre-planned training which can be held in-house or externally, and delivered by library staff or external experts

Note 1 to entry: Informal training, e.g. point-of-use training, is excluded.

### 2.7.7

#### **volunteer**

person working on library tasks without payment

Note 1 to entry: Volunteers can receive token reimbursements or expense allowances.

## 3 Current tasks of libraries

### 3.1 General

In the last decades, electronic media and electronic services have been added to the traditional library's physical collections and services. This involves new requirements as to equipment, technology and especially as to staff skills, and demands changes in processes and organization. Digitization of analogue collections and preservation of digital collections have become crucial issues. Libraries store their institutions' publications in digital repositories and try to guarantee open access to such publications.

The task of teaching information literacy is not new for libraries, but its importance is growing in all types of library. The goal is to enable people to use information resources and communication technology effectively. Libraries offer training that is adapted to the special needs of their user groups, ranging from one-time training to series of lessons. In institutions of higher education, information literacy training is often incorporated in the regular courses of the faculties.

Other developments relate to specially designed services for socially disadvantaged groups, and cooperative projects with an increasing number of non-government organizations. A recent change concerns interactive library services on the Internet, especially via social platforms, or the offer of resources and services for mobile devices. These changes are ongoing and affect all types of libraries. However, there are still considerable differences in the mission and tasks of the different library types.

### 3.2 Types of libraries

Libraries can be roughly subdivided according to their mission and tasks into the following types:

- a) academic libraries — libraries whose primary function is to cover the information needs of learning and research (libraries of institutions of higher education, general research libraries);
- b) public libraries — general libraries that serve the information needs of the whole population of a local or regional community, with emphasis on both formal and individual education, literacy, life-long learning, personal creative development, and recreational activities;
- c) school libraries — libraries attached to all types of schools below the third (tertiary) level of education whose primary function is to serve the pupils and teachers of such a school;
- d) special libraries — libraries covering one discipline or particular field of knowledge or a special regional interest, or primarily serving a specific category of users. Special libraries can also be sponsored by an organization to serve its own work-related objectives. Examples are industrial and commercial libraries, media libraries, government libraries, health service libraries, or libraries of professional and learned institutions and associations;
- e) national libraries — libraries which are responsible for acquiring and conserving copies of all relevant documents in the country in which the library is located, usually via legal deposit.

In a number of cases, libraries have joined their tasks. Joint libraries are formed by more than one organization of different types. The operation can be based on a formal agreement for cooperation,

or a library of one organization can take responsibility for the library activity of other organizations. Examples include joint school and public libraries; joint academic and learned society libraries; joint public and academic libraries. Such libraries are not considered to be a separate type, but should either choose their main function, or divide their functions accordingly (see [6.1.1](#)).

### **3.3 Changes in user activities**

#### **3.3.1 Activities inside the library premises**

The pattern of library use in the physical library is changing. In spite of library resources and services becoming available everywhere and at any time, the library building has a continuing attraction. Surveys illustrate that a growing number of users visit the library for purposes other than borrowing media or otherwise using the collections. Books and other physical materials are becoming less relevant; there is a general trend of users bringing their own materials into the library.

The users come for face-to-face professional help, for learning and studying, for seeking information or inspiration, for Internet searches and to use the library as a meeting place, either for relaxation or for group working. Wireless access is increasingly offered in libraries, thus allowing users with their own devices to access digital materials and online resources from most areas in the library.

Group work has become crucial for learning, therefore group working areas are increasingly offered.

In order to comply with user needs, libraries are opened for as long as possible, sometimes without any staff present. Self-service devices help to maintain important services, and access to the library is made possible by library cards serving as keys.

Today most libraries provide a lively and stimulating environment for their users, alongside quiet spaces for learning, reading, using audio-visual media or the Internet. In some districts with social problems the library may be the only safe and quiet place that students or pupils can find for studying or doing their homework.

The library is also an important meeting and communication centre, in many cases the main such centre, both in communities and in universities. Therefore, recreation and communication areas should be provided. The library's activities in cultural life (exhibitions and other events with a literary, cultural or educational intent) add to the relevance of the library as physical place.

#### **3.3.2 Activities outside the library premises**

For a high percentage of potential library users, using a computer and browsing the Internet have become a matter of course. Libraries therefore offer their services on the Internet, especially via the library website.

As users have become acquainted with social software and interactive services, especially in the commercial sector, libraries have recently also taken up this option and have set up services with interactive user communication such as blogs, wikis, or podcasts, and they have also added options for social bookmarking and tagging to their "traditional" electronic services such as catalogues.

In addition, libraries have begun to join social networks and to present their collections and services on social platforms.

Still more recently, libraries have responded to the growing sector of mobile technology. Mobile devices are becoming popular. They combine the functions of a computer, audio player, camera, and mobile phone. As mobile Internet use is growing rapidly, libraries are adapting their services for use via mobile devices. For this purpose libraries have to format their existing services for mobile application.

Physical services (loans, face-to-face reference, etc.) may also be provided outside the library premises to particular groups of users. Often known as 'outreach' services, examples include clinical librarians in hospital libraries working with medical staff on the wards, or public librarians taking services into sections of the community who are hard to reach with services offered in a traditional way in library buildings.

## 4 Uses and benefits of statistics

### 4.1 Background

#### 4.1.1 General

The statistical data defined and described in this International Standard can be used for the evaluation and comparison of libraries as well as for promoting, marketing and advocating the value that libraries provide for their population and for society.

Library statistics are collected by the individual library and should be summarized on a regional, national or international scale for all libraries or for different types of libraries. While individual libraries mostly use statistics for strategic planning, decision making, funding bids and justification of their use of resources, statistics on a national scale are needed to develop and support the library and information policy and to show the impact and benefits of libraries.

#### 4.1.2 Objectives

Objectives for library statistics can be summarized as follows:

- to monitor operating results against standards and data of similar organizations;
- to monitor trends over time and the effects of innovation;
- to provide a base for planning, decision making, improving service quality, and feedback on the results;
- to inform national or regional organizations in their support, funding and monitoring roles;
- to demonstrate the value of library services obtained by users, including the potential value to users in future generations.

#### 4.1.3 Quality

The quality of the statistics and reliability of data are of vital importance. Statistics, being essentially historical, can only provide information after the event. However, plans for the future need to start from a solid statistical base. Correct, reliable and comparable data are crucial for the value and usefulness of library statistics. This involves consistency in definitions and data collection procedures. Neither should be changed without necessity, as changes can affect the comparability of data over years and with other libraries.

The usefulness of library statistics summarized regionally or nationally depends on accurate and timely delivery by each library and on careful editing to detect errors and misunderstandings.

### 4.2 Developments in library practice

#### 4.2.1 Contents of library statistics

Library statistics comprise inputs and outputs, holdings and expenditure, use and availability. Recent efforts focus also on outcomes and impact.

#### 4.2.2 Sampling

While traditional library statistics are collected over the complete reporting period, this may not be possible for all library services, e.g. in-house use or reference questions. Therefore, this International Standard allows for the application of sampling methods, where data cannot be collected from automated systems, or where data collection over a reporting period would be too time-consuming. For the calculation of a reliable sample size, handbooks of statistical procedures should be consulted.



### 4.2.3 Data for performance measures

In recent decades, there have been important developments to measure and compare the quality and effectiveness of library services and the efficiency of the use of resources. For this purpose, performance indicators have been developed by the library community. This International Standard specifies data provision required by the performance indicators specified in ISO 11620 and ISO/TR 28118.

### 4.2.4 Electronic library services

Up to the preceding edition of this International Standard, statistics of the use of electronic library services were dealt with in an annex. As electronic library services are now incorporated in all libraries and counts of electronic usage are becoming routine in many libraries, the contents of the annex have been updated and integrated into the main standard.

### 4.2.5 Other developments

This revised edition of ISO 2789 has taken up new developments in library services, especially issues such as services to specified user groups, services outside the library premises, preservation and digitization of the collection, services for mobile devices, and also interactive services making use of social software. Though such services are still developing and data change quickly, it was deemed expedient to include statistics for these services, as far as can be identified at this time, into this International Standard.

## 4.3 Selection of statistics for the library

This International Standard recognizes that there are many different types of libraries, in different settings, serving different user groups and having a range of unique characteristics (structure, funding, governance, etc.). Not all statistical data named in this International Standard will be relevant for all types of libraries and there will be much additional data relevant for individual libraries.

## 4.4 Use of statistics

### 4.4.1 General

While the form of statistics varies between academic, public, school and special libraries, and between closed, open and remote access situations, their objectives are the same. Library statistics are necessary for the effective management of libraries and for applying resources to users' needs. They are still more important for the promotion of library services to different types of stakeholders: policy makers and funders; library managers and staff, actual and potential users, the media and the general public. Where statistics are aimed at policy makers, managers and funders, they are essential for decisions on levels of service and future strategic planning. They are also important in generating confidence in libraries to deliver good value for money and services that are well taken up by their users.

### 4.4.2 External communication

Library statistics can be used for explaining, demonstrating and promoting various aspects of library services and library use:

- by counting input (resources, including buildings and equipment, collections and staff), library statistics show the engagement of policy makers and funders in libraries;
- by counting output, namely the usage of library collections and services, statistics show whether the services are adequate for the population to be served;
- comparison of input and output data demonstrates whether libraries are organizing their services in a cost-effective way;
- statistics demonstrate which services are most heavily used, and whether there is a need to modify the type or range of services;

- library statistics provide evidence of trends and developments in user behaviour and user needs.

Although output statistics cannot directly prove outcome or impact of library services on individuals or on the society, data about the frequency and intensity of usage can indicate an impact of libraries on their population. Such impact can concern literacy and information literacy, educational or professional success, social inclusion or cultural identity. It will be easier to trace if qualitative data from user surveys are added to the statistical results.

#### 4.5 Presenting statistics to stakeholders

To gain the full value of the statistics, adequate methods of representing statistical data will be essential, aligned with the interests of the different stakeholder groups.

Stakeholders of libraries will normally be:

- users (actual and potential users);
- funding institutions (e.g. a university, a community);
- sponsors and donors;
- policy makers;
- the general public;
- library staff and managers.

The perception of libraries will differ in these stakeholder groups. Users rate library quality according to their personal experience with the services; statistics for users should therefore describe the local library and show data about the collections or the number and type of user places.

Statistics for funders and policy makers, but also for the media, should be limited to a small number of significant and convincing figures, with a focus on cost-effectiveness (expenditure compared to usage data) and on the value of the library's services for the institution or community (number of users, number and types of usage). By comparing the library's statistics with those of other libraries of similar mission and type, the library could be presented in the context of the regional or national library community.

Statistics for library staff and library management will be much more detailed. They should be used to demonstrate strengths and weaknesses and to show developments over time.

To gain the full value of the statistics, it will be useful, especially when statistics are used for promoting the library's role and value, to illustrate the bare figures with narrative texts about what has happened: e.g. reports about researchers changing from print to electronic media, or about the population groups attending library events for children. Such "anecdotal evidence" will greatly contribute to the acceptability of the statistics.

## 5 Reporting statistical data

### 5.1 General

Statistics referred to in this International Standard should be drawn up at regular intervals, for example annually. The information given should be presented in conformity with the definitions of [Clause 2](#) and should, unless otherwise stated, comply with the recommendations in this International Standard. Every item and activity should be counted as mutually exclusive, i.e. not in more than one category (for example "book" or "digital document"; "interlibrary lending", "electronic document delivery" or "external document supply").

## 5.2 Time period to which data refer

The time period covered should be explicitly stated. It will usually be a year. Data referring to a period should cover the specified period in question, not the interval between two successive surveys. Where total numbers are required, e.g. the total of staff or stock of documents, they usually refer to the end of the reporting period unless explicitly stated otherwise.

## 5.3 Data estimated by sample

Where statistics have been compiled by sample survey rather than from a full count, the method used should be indicated. Care needs to be taken that samples are representative as regards time, place and selection methods, and that bias is not present in the responses. It also needs to be understood that, even where samples are fully representative, the procedure produces estimates that are subject to some error.

# 6 Collecting statistical data

## 6.1 Libraries

### 6.1.1 Counting administrative units and libraries

Each library should appear in one of the categories defined in [2.1](#) according to its primary function. Where a library has more than one function or where a joint library is formed by more than one organization (e.g. school library and public library), the library either decides what its primary function is or, in extreme cases, divides its functionality and report data accordingly.

The following statistics should be supplied for each entity:

total number of administrative units plus the numbers of central/main, branch and/or mobile libraries that it contains. This is illustrated in the following example.

**EXAMPLE** A public library consisting of five branch libraries and two mobile libraries besides the central library would comprise the following:

a)	administrative units:	1
b)	central/main libraries:	1
c)	branch libraries:	5
d)	mobile libraries:	2
e)	total libraries:	8

### 6.1.2 Counting types of libraries

#### 6.1.2.1 National library

The following should be counted:

- a) number of administrative units;
- b) number of libraries:
  - number of those being central/main libraries;
  - number of those being branch libraries;
- c) population of the country (at the beginning of the reporting period).

#### 6.1.2.2 Library of an institution of higher education

The following should be counted:

- a) number of administrative units;
- b) number of libraries:
  - number of those being central/main libraries;
  - number of those being branch libraries;
- c) number of external service points;
- d) total number of the population to be served in the institution — students (undergraduate and graduate), faculty and staff, both full-time and part-time;
- e) total number of the population to be served in the institution — students (undergraduate and graduate), faculty and staff as full-time equivalent (FTE).

#### 6.1.2.3 Special library

The following should be counted:

- a) number of administrative units; the recommended classification for reporting by type is as follows:
  - government (including agencies and international organizations);
  - health service/medical;
  - professional and learned institutions and associations;
  - industrial and commercial;
  - media;
  - regional;
  - other (including voluntary organizations);
- b) number of libraries in each of the above areas.

#### 6.1.2.4 Public library

The following should be counted:

- a) number of administrative units; the recommended classification for reporting by size of population to be served is as follows:
  - up to 3 000;
  - from 3 001 to 5 000;
  - from 5 001 to 10 000;
  - from 10 001 to 50 000;
  - from 50 001 to 100 000;
  - from 100 001 to 500 000;
  - over 500 000;

NOTE A distinction may be made between public libraries that are financed mainly by public authorities and those that are financed mainly from private sources.

- b) number of libraries in each of the following areas:
  - central/main libraries;
  - branch libraries;
  - mobile libraries;
- c) number of external service points;
- d) total population to be served in a local community (population at the beginning of the reporting period).

NOTE This is normally the population of the legal service area.

#### **6.1.2.5 School library**

The following should be counted:

- a) number of administrative units; the recommended classification by the number of pupils to be served is as follows:
  - up to 200;
  - from 201 to 500;
  - from 501 to 1 000;
  - more than 1 000;
- b) total number of pupils and teachers in schools served by the school library.

#### **6.1.2.6 Storage library**

The following should be counted:

- a) number of administrative units;
- b) number of libraries.

### **6.2 Services and use**

#### **6.2.1 General**

This clause covers the use of both traditional and electronic library services, including interactive services on the Internet and services formatted for mobile devices.

#### **6.2.2 Users**

The following should be counted:

- a) number of registered users (at the end of the reporting period);
- b) number of those newly registered (during the reporting period);
- c) number of active borrowers;
- d) number of active users.

NOTE 1 If enrolling (registering) in the institution automatically includes registration for the library, the number of registered users will equal or be greater than the size of the population to be served.

NOTE 2 The count of active users can be established either by a direct identity count at the entry or exit, by a population sample survey or by a sample of users to establish the proportion to be added to c) above.

NOTE 3 See also A.2.1.1.

### 6.2.3 Lending services

#### 6.2.3.1 Loans (excluding interlibrary lending)

Loans are counted in the following categories:

- a) number of loans to users that allow removal from the library premises (ordinary loans):
  - number of initial loans (excluding on-site loans);
  - number of eBook loans (usable via eBook readers);
  - number of eBook loans (contents only transmitted to users).

NOTE 1 Short loans are included.

NOTE 2 Loans to distance users delivered by mail are included.

NOTE 3 Renewals are excluded.

NOTE 4 Copied documents supplied in place of original documents (including fax) and printouts of electronic documents made by library staff for the user are counted separately.

NOTE 5 See also A.2.1.2.

- b) number of on-site loans.

#### 6.2.3.2 Renewals

Renewals are counted in the following categories:

- a) renewals initiated by users;
- b) automatic renewals generated by the library system without user interaction.

#### 6.2.3.3 Physical units on loan

Count the number of physical units on ordinary and on-site loan on a specified day.

NOTE These can be counted in addition to loans, at specific times of year that represent an average activity level.

#### 6.2.3.4 In-house-use

Count the number of physical units removed from open-access shelves by users for use on the premises, including browsing at the shelves. This count may be estimated by one of several methods:

- a) re-shelving count;
- b) observation studies;
- c) user questionnaire (handed out before the search);
- d) techniques used for book identification such as radio frequency identification (RFID).

The method used should be reported.

The annual total is to be established from a sample count. The sample should be taken in one or more normal weeks and grossed up.

On-site loans should, if possible, be excluded or deducted to avoid double counting with [6.2.3.1](#).

#### **6.2.3.5 Physical units in use within the library**

Count the number of physical units that are used in-house on a specified day.

NOTE These can be counted in addition to in-house use at specific times of year that represent an average activity level.

With some counting methods, the results might include items on ordinary and on-site loan being used in the library. These should be deducted to avoid double counting with [6.2.3.1](#).

#### **6.2.3.6 Reservations**

Count the number of transactions initiated by users during the reporting period.

### **6.2.4 Interlibrary lending**

#### **6.2.4.1 Interlibrary lending within the country**

##### **6.2.4.1.1 Interlibrary loan requests received from other libraries**

The following should be counted:

- a) total number of requests received from other libraries;
- b) number of interlibrary loan requests satisfied, by form:
  - number of loans supplied (original documents);
  - number of copies in print form in place of original documents.

If the sub-unit counts are not available, the total count, irrespective of form, should be supplied.

NOTE Renewals of supplied loans are excluded, but may be counted separately.

##### **6.2.4.1.2 Interlibrary loan requests made to other libraries**

The following should be counted:

- a) total number of interlibrary loan requests made to other libraries;
- b) number of responses to interlibrary loan requests received by form:
  - number of loans received (original documents);
  - number of copies in print form in place of original documents.

If the sub-unit counts are not available, the total count, irrespective of form, should be supplied.

NOTE Renewals of received loans are excluded, but may be counted separately.

#### **6.2.4.2 Interlibrary lending at the international level**

##### **6.2.4.2.1 Interlibrary loan requests received from other countries**

The following should be counted:

- a) total number of requests received from other countries;
- b) number of interlibrary loan requests satisfied by form:
  - number of loans supplied (original documents);
  - number of copies in print form in place of original documents.

If the sub-unit counts are not available, the total count, irrespective of form, should be supplied.

NOTE Renewals of supplied loans are excluded, but may be counted separately.

##### **6.2.4.2.2 Interlibrary loan requests made to other countries**

The following should be counted:

- a) total number of interlibrary loan requests made to other countries;
- b) number of responses to interlibrary loan requests received by form:
  - number of loans received (original documents);
  - number of copies in print form in place of original documents.

If the sub-unit counts are not available, the total count, irrespective of form, should be supplied.

NOTE Renewals of received loans are excluded, but may be counted separately.

##### **6.2.4.3 Loans to exhibitions**

Count the number of items from the library's collection that are lent to other institutions for the purpose of exhibitions during the reporting year.

#### **6.2.5 Reference and informational questions**

##### **6.2.5.1 Reference questions**

Count the number of reference questions (see also A.2.1.3).

Count the number of these delivered to the library by electronic media (via email, the library website or other networked communications mechanisms).

The annual total is to be established from a sample count. The sample should be taken in one or more normal weeks and grossed up.

##### **6.2.5.2 Informational questions**

Count the number of directional and/or administrative questions (see also A.2.1.4).

NOTE This includes e.g. questions for locating staff or facilities, regarding opening times or about handling equipment such as reader printers or computer terminals.

Count the number of these delivered to the library by electronic media (via email, the library website or other networked communications mechanisms).



The annual total is to be established from a sample count. The sample should be taken in one or more normal weeks and grossed up.

## 6.2.6 Copying

### 6.2.6.1 Photocopies and microforms produced by libraries

Count the number of copies replacing original documents produced by libraries for their users (excluding those made by self-service copying machines installed on library premises and those made for interlibrary lending):

- a) number of sheets photocopied;
- b) number of physical units microfilmed;
- c) number of sheets scanned;
- d) number of sheets printed out.

NOTE Copies in electronic form are counted as electronic document delivery (see [6.2.7](#)).

### 6.2.6.2 Photocopying by users (from non-electronic resources)

The following should be counted:

- a) number of sheets copied in self-service by users on the library premises (normally taken from the counter on the machine);
- b) number of sheets scanned in self-service by users on the library premises.

## 6.2.7 Electronic document delivery (mediated)

Count the number of documents transmitted by a library from its collection in electronic format:

- a) with charge;
- b) without charge.

NOTE 1 Counts can be additionally subdivided as to the number of direct deliveries to end-users and those via another library.

NOTE 2 Unmediated downloading by users who have access to the library's electronic resources is not counted as electronic document delivery.

## 6.2.8 External document supply

Count the number of documents in print or digital form received from non-library suppliers (not through interlibrary lending) with the library being involved in the transaction and/or the payment, by form:

- a) print;
- b) electronic.

## 6.2.9 Events organized by the library

### 6.2.9.1 Number of events

The following should be counted:

- a) number of exhibitions;

- b) of a), the number of virtual exhibitions;
- c) number of all other events (including virtual events and off-site events), typically with a literary, cultural, social or educational intent;
- d) of c), off-site events;
- e) of c), virtual events.

NOTE 1 The events can be differentiated as to those undertaken by the library on its own and those undertaken in cooperation or with organizational input of the library.

NOTE 2 The events can be subdivided into target groups; e.g. events for children, for persons with non-native languages.

NOTE 3 Events inside the library where the library is not involved are excluded.

NOTE 4 It is not relevant for the count of virtual exhibitions whether they mirror a physical event or are the only format.

#### **6.2.9.2 Attendances at events**

Count the total number of attendances at events according to the type of event:

- a) attendances to exhibitions;
- b) of a), attendances to virtual exhibitions;
- c) attendances to all other events, typically with a literary, cultural, educational, or social intent;
- d) of c), attendances to off-site events;
- e) of c), attendances to virtual events.

#### **6.2.10 Physical visits**

Count the number of visits made by persons (individuals) to the library premises annually. This may be counted at either entrance or exit by one of the following methods:

- a) turnstile count;
- b) electronic counter;
- c) manual count.

Any of these methods, but particularly the manual count, may be used for one or more sample time periods and grossed up to give an annual estimate. The method used should be reported. Where necessary, the count should be adjusted to deduct entrances and exits of library staff, and of any persons visiting other institutions or departments situated within the library building.

#### **6.2.11 User orientation and training**

The following should be counted:

- a) total number of training lessons;
- b) total hours of user training undertaken by the library, either in the orientation of collections, services and facilities or in the use of information resources;
- c) number of attendances at user-training lessons;
- d) number of accesses to web-based training services offered by the library.

NOTE 1 One hour of training may include a timetabled break of up to 15 minutes.

NOTE 2 In academic libraries, training organized together with faculty staff could be counted separately.

## **6.2.12 Use of electronic resources and services**

### **6.2.12.1 Number of searches**

Count the total number of searches conducted. Typically, a search is recorded each time a search form of a library-provided online service is submitted to the server.

NOTE Mistyped search strings do not represent unique intellectual inquiries. In practice, however, libraries will have difficulty in differentiating these unintended searches from intended, but unsuccessful, searches.

### **6.2.12.2 Number of accesses**

Count the total number of successful requests of a library-supplied electronic service.

NOTE 1 In some cases, e.g. online catalogue use inside the library, several users might make use of the same workstation one after another, and accesses could not be separated. In most systems, an access is cut off after a specified time of non-use, thus avoiding part of the problem.

NOTE 2 Browser or proxy caching will be likely to reduce the number of requests registered in logfiles.

#### **6.2.12.2.1 Number of rejected accesses (turnaways)**

Count the number of unsuccessful requests of a licensed electronic service provided by the library by exceeding the simultaneous user limit. Request failure because of wrong passwords is excluded.

This dataset shows how far the simultaneous user limit is sufficient for users' demand.

NOTE The number of accesses exceeding the simultaneous user limit cannot always be differentiated from other rejections, e.g. missing or mistyped passwords.

### **6.2.12.3 Number of downloads**

Count the total number of successful content unit downloads requested from a library-provided online service.

NOTE Browser or proxy caching will be likely to reduce the number of requests registered in log files.

### **6.2.12.4 Number of Internet accesses**

Count the number of Internet accesses by users from a workstation owned by the library or from a user's private computer or mobile device inside the library via the library's network.

This dataset shows the extent to which the library provides access to the Internet for its users via its workstations or a network connection.

NOTE 1 Internet access via a user's private computer (e.g. laptop or mobile device) via the library's wireless network inside the library should be counted and reported separately.

NOTE 2 The number of Internet accesses can only be counted if users have registered or authenticated themselves when accessing the Internet. If these data are not available, the number might be estimated by surveying users.

### **6.2.12.5 Use of the digitized collection**

Usage data for digitized documents can only be counted if those documents are identifiable in the electronic collection. The data are part of the total use of the electronic collection.

If possible, count the number of items retrieved (content units downloaded) from digitized documents (whole documents or parts of documents).

NOTE Data will be influenced by the access policies established for digitized materials.

### **6.2.13 Number of virtual visits**

Count the number of virtual visits on the library website, regardless of the number of pages or elements viewed, during the reporting period.

NOTE 1 The calculation of virtual visits involves specific analysis software. Depending on the method used, the recording of website statistics may be limited to a selection of core pages.

NOTE 2 The calculation of virtual visits may be based on specific techniques such as visiting Web browsers, visiting IP addresses, or the number of accesses to the homepage. Libraries should select and specify which method of calculation is used.

### **6.2.14 Services for mobile devices**

#### **6.2.14.1 Services for mobile devices offered by the library**

Count the number of services formatted for mobile use that the library offers at the end of the reporting period. Count both the services that have been adapted from existing library services and those that have been developed directly for mobile use.

Examples of such services are mobile websites, mobile catalogues, mobile instruction, library tours, SMS-services (reference, notifications), access to reference tools, etc.

NOTE 1 A special collection adapted to mobile devices is counted as one service.

NOTE 2 Several applications formatted for the same library service count as one mobile service.

#### **6.2.14.2 Usage counts**

Count the number of accesses to library services via mobile devices as a subset of all usage of the services.

NOTE 1 The counts are made separately for each service, e.g. OPAC accesses or reference service.

NOTE 2 If the service has been designed independently of platform, weblog statistics can be used.

NOTE 3 If it is a specialized application, usage numbers should be capturable through that application.

### **6.2.15 Services for interactive use**

#### **6.2.15.1 Number of services and content units**

##### **6.2.15.1.1 Library hosted interactive services**

Count the number of interactive services (blogs, wikis, podcasts, etc.) hosted by the library for public as well as for internal use.

NOTE Each type of interactive service is counted separately (e.g. blogs, podcasts). The numbers of services can then be summed.

### **6.2.15.1.2 Social network services**

Count the number of social network services on which the library is using an account or has registered as a member.

NOTE A library's presence on a social network is counted only once, irrespective of the number of separate pages or instances.

### **6.2.15.1.3 Contents units on social networks**

Count the number of content units that the library has created for the social network service.

NOTE 1 The counts should be summed for all services.

NOTE 2 One content unit created for several different services should be counted several times.

## **6.2.15.2 Usage of interactive services**

### **6.2.15.2.1 Library-hosted interactive services**

Count the following data by using log file analysis:

- a) number of accesses;
- b) number of entries (posts, comments, messages) received;
- c) number of subscribers to the service, if appropriate;
- d) number of downloads (from podcasts).

NOTE For each type of interactive service the data should be counted separately. The numbers for all services could then be summed.

### **6.2.15.2.2 Social network services in which the library partakes**

Count as core datasets:

- a) number of accesses (visits) to the library's account;
- b) number of downloads of documents that the library has uploaded on a social network.

In addition to these core datasets which provide basic information on the use of social network services, some data have been found relevant and should be collected when possible and appropriate:

- c) number of subscribers (e.g. fans/followers) to the library's account;
- d) number of posts or new entries within the library's account.

NOTE 1 The data are counted separately for each social platform where they apply.

NOTE 2 Summing of numbers across all social platforms is not recommended, as each of the networks provides data in a different format and analysis unit. The statistics will only be comparable between libraries for each social network individually.

NOTE 3 Externally hosted social networks have independent counting tools and data log files that provide usage data, e.g. number of subscribers (followers), number of accesses (visits).

NOTE 4 Third party tools may also provide usage data.

## 6.2.16 Services for target populations with special needs

### 6.2.16.1 General

Target populations with special needs are parts of a library's population to be served, with needs that require special library services.

NOTE 1 The special needs can be caused by physical and health impairment, economic disadvantage (e.g. long-term unemployment), cultural difference (e.g. non-native speakers, new arrivals), educational background, or other circumstances that require special library services.

NOTE 2 Children, young people and seniors without additional needs are not included.

NOTE 3 A library may have more than one target population with special needs.

NOTE 4 An individual may belong to more than one such target population.

Services provided for such groups will vary according to need, but usually include the following:

- a) special collections;
- b) special events;
- c) long-term services.

### 6.2.16.2 Special collections

The following should be counted:

- a) the number of physical documents in the library stock which are directed to meet the needs of the target population;

NOTE Each target population is counted separately. This may be subdivided in accordance with the subdivisions in [6.3.2](#) to [6.3.14](#) and Annex A.2.1.

- b) the number of physical documents acquired during the year to meet the needs of the target population;

NOTE Each target population is counted separately. This may be subdivided in accordance with the subdivisions in [6.3.2](#) to [6.3.14](#) and Annex A.2.1.

- c) the number of electronic documents in the library collection which are directed to meet the needs of the target population;

NOTE Each target population is counted separately. This may be subdivided in accordance with the subdivisions in [6.3.11](#) to [6.3.14](#).

- d) the number of electronic documents acquired during the year to meet the needs of the target population.

NOTE Each target population is counted separately. This may be subdivided in accordance with the subdivisions in [6.3.11](#) to [6.3.14](#).

### 6.2.16.3 Use of the special collections

The following should be counted:

- a) the number of loans from the collection of documents which are directed to meet the needs of the target population, including on-site loans, during the reporting period;

NOTE 1 Each target population is counted separately. This may be subdivided in accordance with [6.3.2](#) to [6.3.14](#). This may also be subdivided in accordance with the categories for stock in Annex A.2.1.

NOTE 2 The count can include use by other than members of the target population.

- b) the number of accesses to electronic documents in the library collection which are directed to meet the needs of the target population during the reporting period.

NOTE 1 Each target population is counted separately.

NOTE 2 The count can include use by other than members of the target population.

#### **6.2.16.4 Events for target populations with special needs**

The following should be counted:

- a) the number of events targeted at each target population;
- b) the total number of attendances at events targeted at the target population.

NOTE The count can include attendances by other than members of the target population.

#### **6.2.16.5 Long-term services for target populations with special needs**

The following should be counted:

- a) the number of institutionalized long-term services that have been arranged by the library for target populations with special needs during the reporting period;

NOTE 1 Examples of such services are media transport for house-bound persons, reference service in a minority language, regular reading groups for a specified group, job service for unemployed persons, etc.

NOTE 2 One-time services are excluded and, where applicable, counted as events.

- b) the number of cases of usage of each long-term service during the reporting period.

### **6.3 Collection**

#### **6.3.1 Introduction**

For further subdivisions of the categories in [6.3.2](#) to [6.3.15](#), see [Annex A](#).

#### **6.3.2 Books and serials (printed material)**

##### **6.3.2.1 Stock**

The following should be counted:

- a) number of physical units in total stock;
- b) of a), the number of physical units normally housed on open-access shelves;
- c) number of titles in total stock.

NOTE 1 Where a count of physical units is not feasible, an alternative measure is the length of shelving occupied by stock (see [6.4.8.4](#)). This space measure may also be used to estimate the number of physical units.

NOTE 2 Bound periodicals are to be counted as physical units. Unbound periodicals and newspapers are to be included in the count as if they were collected into bound physical units. Usually a volume will comprise the issues of one year. One loose-leaf binder should be counted as one physical unit.

NOTE 3 If required by the library, books and serials may be counted separately.

NOTE 4 Books may contain enclosures such as CD-ROMs, diskettes, slides, etc. These enclosures are not to be counted separately.

### 6.3.2.2 Additions

The following should be counted:

- a) number of physical units added to total stock;

NOTE As an alternative, the number of linear metres added to total stock may be calculated.

- b) number of titles added.

NOTE This will frequently equal the number of new catalogue records added (see [6.4.5](#)).

### 6.3.2.3 Withdrawals

The number of physical units withdrawn should be counted.

NOTE As an alternative, the number of linear metres withdrawn from the stock may be calculated.

## 6.3.3 Manuscripts

### 6.3.3.1 Stock

The following should be counted:

- a) number of linear metres of shelves occupied by total manuscript collection;
- b) number of physical units.

NOTE Bound volumes and other units (fragments, rolls, autographs, etc.) may be counted separately.

### 6.3.3.2 Additions

The following should be counted:

- a) number of linear metres of shelves added to manuscript collection;
- b) number of physical units added.

### 6.3.3.3 Withdrawals

The number of physical units withdrawn should be counted.

## 6.3.4 Microforms

### 6.3.4.1 Stock

The number of physical units should be counted.

### 6.3.4.2 Additions

The number of physical units added should be counted.

### 6.3.4.3 Withdrawals

The number of physical units withdrawn should be counted.



### **6.3.5 Cartographic documents**

#### **6.3.5.1 Stock**

The number of physical units should be counted.

#### **6.3.5.2 Additions**

The number of physical units added should be counted.

#### **6.3.5.3 Withdrawals**

The number of physical units withdrawn should be counted.

### **6.3.6 Printed music documents**

#### **6.3.6.1 Stock**

The following should be counted:

- a) number of physical units in total stock;
- b) number of titles in total stock.

Bound collections of music should be counted as physical units. Unbound items should be included in the count as if they were collected into bound physical units. Where appropriate, cases or folders with separate units in them should be counted.

EXAMPLE Sets of chamber music and orchestral parts are generally counted by the set, not as separate parts.

#### **6.3.6.2 Additions**

The following should be counted:

- a) number of physical units added;
- b) number of titles added.

NOTE This will frequently equal the number of new catalogue records added.

#### **6.3.6.3 Withdrawals**

The number of physical units withdrawn should be counted.

### **6.3.7 Audiovisual documents**

#### **6.3.7.1 Stock**

The total number of audiovisual documents in the library collection should be counted:

- on physical carriers (physical units);
- installed on stand-alone workstations (titles);
- networked (titles).

The total number should be subdivided by type and counted separately:

- a) audio — music;

- b) audio — talking books;
- c) visual;
- d) combined audiovisual.

If the sub-unit counts are not available, the total count, irrespective of type, should be supplied.

NOTE 1 Physical units will usually be CD cases, record sleeves or cassette, or video boxes.

NOTE 2 If audiovisual documents are accompanied by print materials (leaflets, libretti, etc.), these materials should not be counted separately.

#### **6.3.7.2 Additions**

Count the number of audiovisual documents added:

- on physical carriers (physical units);
- installed on stand-alone workstations (titles);
- networked (titles).

The categories should be subdivided by type:

- a) audio — music;
- b) audio — talking books;
- c) visual;
- d) combined audiovisual.

If the sub-unit counts are not available, the total count, irrespective of type, should be supplied.

#### **6.3.7.3 Withdrawals**

Count the number of audiovisual documents withdrawn:

- on physical carriers (physical units);
- installed on stand-alone workstations (titles);
- networked (titles).

### **6.3.8 Graphic documents**

#### **6.3.8.1 Stock**

The number of physical units should be counted.

#### **6.3.8.2 Additions**

The number of physical units added should be counted.

#### **6.3.8.3 Withdrawals**

The number of physical units withdrawn should be counted.

### **6.3.9 Patents**

#### **6.3.9.1 Stock**

Count the number of patents in the library collection:

- in print or microform format;
- in electronic format.

#### **6.3.9.2 Additions**

Count the number of patents added:

- in print or microform format;
- in electronic format.

#### **6.3.9.3 Withdrawals**

Count the number of patents withdrawn:

- in print or microform format;
- in electronic format.

### **6.3.10 Other library documents and items**

#### **6.3.10.1 Stock**

The number of physical units should be counted.

Count the units handled. Where articles are normally housed, issued and used in sets, boxes, or on sheets, then the unit to be counted will be the 'handling' unit (e.g. boxes or trays of tickets, sheets or albums of postage stamps, albums of photographs, kits of curriculum materials). This will frequently correspond with the unit for cataloguing purposes. Items separately catalogued should normally be counted as separate units.

#### **6.3.10.2 Additions**

The number of physical units added should be counted.

#### **6.3.10.3 Withdrawals**

The number of physical units withdrawn should be counted.

### **6.3.11 eBooks**

#### **6.3.11.1 Stock**

The number of eBooks (titles) in the electronic collection should be counted.

NOTE The number of titles can be higher than the number of subscriptions, as there may be several titles comprised in one eBook, and eBooks can also be acquired by purchase, gift or legal deposit right.

#### **6.3.11.2 Additions**

The following should be counted:

- a) number of eBooks added by purchase (titles);
- b) number of eBooks added by digitization by the library (titles).

#### **6.3.11.3 Withdrawals**

Count the number of eBooks (titles) withdrawn.

### **6.3.12 Other digital documents**

#### **6.3.12.1 Stock**

Count the number of other digital documents in the library collection:

- on physical carriers (physical units);
- networked or installed on stand-alone workstations (titles).

NOTE Physical carriers are usually available for lending or use on stand-alone workstations in the library.

#### **6.3.12.2 Additions**

Count the number of other digital documents added:

- on physical carriers (physical units);
- networked or installed on stand-alone workstations (titles).

#### **6.3.12.3 Withdrawals**

Count the number of other digital documents withdrawn:

- on physical carriers (physical units);
- networked or installed on stand-alone workstations (titles).

### **6.3.13 Databases**

#### **6.3.13.1 Stock**

Count the number of databases in the library collection:

- on physical carriers (physical units);
- on the local network or installed on stand-alone workstations (titles);
- on other servers where the library has acquired access rights (titles).

NOTE Library catalogues acquired and paid for to serve as reference databases are also counted here.

#### **6.3.13.2 Additions**

Count the number of databases added:

- on physical carriers (physical units);
- on the local network or installed on stand-alone workstations (titles);

— on other servers where the library has acquired access rights (titles).

### 6.3.13.3 Withdrawals

Count the number of databases withdrawn:

- on physical carriers (physical units);
- on the local network or installed on stand-alone workstations (titles);
- on other servers where the library has acquired access rights (titles).

### 6.3.14 Current serials received (at the end of the reporting period; all formats: print, microform, electronic)

#### 6.3.14.1 In print or microform

The following should be counted:

- a) number of current periodical subscriptions;
- b) number of current periodical titles;
- c) number of current newspaper subscriptions;
- d) number of current newspaper titles.

Reports that appear regularly and regular conference proceedings are to be included here as periodicals.

Monograph series, other reports and proceedings of occasional conferences are to be included in [6.3.2](#) or [6.3.4](#).

NOTE This includes additional print licences to titles held in electronic format.

#### 6.3.14.2 Electronic serials

The following should be counted:

- a) number of current periodical titles;
- b) number of current newspaper titles.

NOTE 1 This includes titles held locally and titles acquired for remote access.

NOTE 2 This includes additional electronic licences for access to titles held in print format.

NOTE 3 This includes titles comprised in “additional access” or “cross access” in consortia agreements for the time of the contractual agreement.

NOTE 4 Electronic journals in free Internet resources which have been catalogued by the library in its online catalogue or a database should be counted and reported separately (see [6.3.15](#)).

#### 6.3.14.3 Serials in total

The following should be counted:

- a) number of current periodical subscriptions (all formats);
- b) number of current periodical titles (all formats);
- c) number of current newspaper subscriptions (all formats);
- d) number of current newspaper titles (all formats).

NOTE The number of multiple subscriptions can be calculated from the difference between a) and b) and between c) and d), respectively.

#### 6.3.15 Free Internet resources

Count the number of links to individual free Internet resources (digital documents, databases, electronic journals, etc.) which have been catalogued by the library in its online catalogue or a database.

NOTE Double titles should be excluded if possible.

### 6.4 Access and facilities

#### 6.4.1 Opening hours

Count the number of hours when the main physical services are available to users during a normal week:

- a) in the central/main library;
- b) in branch libraries (average);
- c) in branch libraries (sum of all opening hours of all branch libraries).

NOTE 1 For a) and c), unstaffed opening hours are counted separately.

NOTE 2 If there are differing opening hours over long parts of the year (e.g. summer and winter), the longest opening hours are counted.

#### 6.4.2 Days open

Count the number of days during the reporting period (usually a year) when the main services were available to users:

- a) central/main library;
- b) branch libraries (average);
- c) branch libraries (sum of all days open of all branch libraries).

#### 6.4.3 User places

Count the number of user places available in the library to users at the end of the reporting period.

NOTE 1 The number of places for informal (relaxed) seating should be counted separately.

NOTE 2 The number of places where the library's wireless network allows users to connect to the Internet could be counted separately.

#### 6.4.4 Public access workstations

Count the number of computer workstations inside the library premises available to users.

NOTE User places where users can connect their own computer to the Internet are counted in [6.4.3](#).

#### 6.4.5 Catalogue records

The following should be counted:

- a) total number of catalogue records (bibliographic records) at the end of the reporting period;
- b) percentage of these automated;

c) of a), the number added during the year.

#### **6.4.6 Reprographic facilities**

The following should be counted separately:

- a) photocopying machines available for unmediated use by users;
- b) printers available for public use;
- c) scanners available for public use.

NOTE One machine may serve all three functions.

#### **6.4.7 eBook readers**

The following should be counted:

- a) total number of eBook readers available for public use;
- b) number of these available for loan.

#### **6.4.8 Space**

##### **6.4.8.1 Net usable area for library functions**

The net usable area is expressed in square metres.

It includes space for user services (including areas for recreation and communication), materials storage, library management and technical services, events, exhibitions and meetings, equipment areas, aisles, toilets and all other space used for library resources and services. It excludes vestibules, traffic areas, janitorial or custodial storage and service areas, elevators, stairway space, building corridors, space for utility management.

NOTE Separate figures may be given for the main library and branch libraries.

##### **6.4.8.2 Net usable area by function**

The net area calculated in [6.4.8.1](#) may be allocated to the following main functions:

- a) user services — includes space for reading and studying (individual or group), lending, reference and information, and any other services delivered to users, self-service areas (lending and returning plus sorting robots), also areas for recreation and communication, sickrooms, the entrance hall, and open access storage areas, as integrated parts of user service areas;
- b) library management and technical services — includes acquisitions and cataloguing, preservation and restoration, bindery, reprography and digitizing, computing and management, projects, storerooms, staff meeting areas, staff lounges and sickrooms;
- c) materials storage — includes all areas devoted principally to storing materials, whether open or closed access;
- d) events, etc. — includes training and meeting rooms, space for events and citizens' services, and formal exhibition space.

The total of a), b), c) and d) should be equal to the area reported in [6.4.8.1](#).

##### **6.4.8.3 Gross floor area of library buildings**

The gross floor area is expressed in square metres.

This is the total space in the library building or buildings and will include those areas specifically excluded from [6.4.8.1](#).

#### **6.4.8.4 Shelf counts**

The following should be counted:

- a) number of linear metres of shelves occupied by total stock;
- b) number of linear metres occupied by collections on open-access shelves.

### **6.5 Management**

#### **6.5.1 Cooperation**

##### **6.5.1.1 Cooperative projects**

Count the number of cooperative projects that the library has run within the reporting year. Include only institutionalized and/or especially funded cooperation initiatives and projects.

International projects should be counted separately.

NOTE 1 International projects are those with at least one partner from outside the nation.

NOTE 2 Ad hoc cooperation should be excluded.

##### **6.5.1.2 Partnership**

Count the number of the library's ongoing, formalized partnerships with other libraries and/or other institutions at the end of the reporting period.

International partnerships should be counted separately.

NOTE International partnerships are those with at least one partner from outside the nation.

#### **6.5.2 Library staff research publications**

Count the number of library staff research publications per year.

NOTE Publications published in peer-reviewed journals could be counted separately.

#### **6.5.3 Publications about the library**

Count the number of reports, papers and audio-visual documents dealing with the library in the media (newspapers, television, radio, etc.), both in traditional format and on the Internet.

NOTE 1 The reports and papers will usually be composed by persons outside the library, but can also be composed by library staff.

NOTE 2 Comments to reports and papers and short notices (e.g. as to modified opening times) are excluded.

NOTE 3 If the same report, paper, etc. is published in several media (e.g. several newspapers), it should be counted separately in each medium.

#### **6.5.4 Preservation/conservation**

Count the total number of items in the collection that have received preservation/conservation treatment during the reporting period.



Preservation/conservation treatment in the sense of this International Standard includes only those methods that conserve the item in its original form:

- a) treatment with traditional (manual) techniques, for example reinforcing joints or liquid paper pulp treatment;
- b) mass conservation (deacidification).

NOTE 1 Replacement of the original by copy, microfilm, digitization, or purchase of a new copy is excluded.

NOTE 2 Preservation/conservation carried out by the library itself and by outside contractors could be counted separately.

### 6.5.5 Digitization

Count the total number of items from the analogue collection that have been digitized during the reporting period. The total number can be split into different types of materials:

- a) digitized books (volumes);
- b) digitized serials (volumes);
- c) digitized manuscripts (physical units);
- d) digitized microforms (physical units);
- e) digitized cartographic documents (physical units);
- f) digitized printed music documents (titles or physical units, according to [6.3.6.1](#));
- g) digitized audiovisual documents (titles or physical units, according to [6.3.7.1](#));
- h) digitized graphic documents (physical units)
- i) other digitized documents (physical units, according to [6.3.10.1](#)).

NOTE 1 Digital materials converted into new digital formats are reported separately.

NOTE 2 An item is only counted as digitized if the complete item has been digitized.

NOTE 3 For a), b), c) and f) count also the number of digitized pages, where possible.

NOTE 4 Digitized newspapers could be counted separately.

NOTE 5 For audiovisual documents, count also the number of digitized hours, where possible.

## 6.6 Funding and expenditure (during the reporting period)

### 6.6.1 Operating (ordinary) expenditure

#### 6.6.1.1 On employees

The following should be counted:

- a) total amount of money spent on salaries and wages, allowances and other employee benefits, and other related expenditure;

NOTE Separate figures can be given for professional staff, qualified specialist staff, other staff, and student assistants.

- b) costs of staff training, including training materials and fees for external experts.

NOTE The costs of the time that library staff spends on training or being trained are excluded.

#### 6.6.1.2 On acquisitions

Count the costs of all items added to a library collection for the benefit of users by resource type:

- a) printed books;
- b) printed serials;
- c) non-electronic audiovisual documents;
- d) other non-electronic documents;
- e) databases;
- f) electronic serials;
- g) digital documents (excluding eBooks);
- h) eBooks.

NOTE 1 Subsets a) to d) may be amalgamated to give a sub-total for “print or other non-electronic material”.

NOTE 2 Subsets e) to h) may be amalgamated to give a sub-total for the electronic collection.

NOTE 3 Value-added taxes, sales and service taxes or other local taxes are included. Their inclusion may affect international comparisons.

NOTE 4 If databases or electronic serials are financed within a consortium or partially by central funding, only the library's own expenditure should be counted.

NOTE 5 If free electronic access is added to a print document bought or subscribed to by the library, the expenditure should be counted only for the print document. If a surplus has to be paid for electronic access, only this surplus should be counted in e), f), or g).

#### 6.6.1.3 On external document supply and interlibrary lending

Count the costs of document deliveries and of interlibrary lending that are paid by the library.

#### 6.6.1.4 On collection maintenance

The following should be counted:

- a) costs of binding, preservation and conservation where carried out by outside contractors;
- b) costs of material conversion (microfilming, copying) where carried out by outside contractors;
- c) costs of digitization where carried out by outside contractors.

NOTE 1 Figures for the rare book collection are given separately.

NOTE 2 If the activities a) to c) are carried out by the library, the costs of the staff time are not counted, but the costs of materials for each activity could be counted separately.

#### 6.6.1.5 On premises

Count the costs of rent, maintenance and services (heat, light, water, sewage).

#### 6.6.1.6 On information technology

Count the costs of computers, network (operations and maintenance), software licences and telecommunications.

#### **6.6.1.7 On open access publishing fees**

Count the costs of institutional or single author fees for open access publishing paid by the library.

#### **6.6.1.8 Miscellaneous**

Count all other costs including cataloguing records, copying, postage, promotion of services, expenses for events and exhibitions, stationery, insurance, transport and communications, consulting, equipment costs and interest payments on debt, if applicable.

#### **6.6.2 Capital expenditure**

The following should be counted:

- a) expenditure for the acquisition of, or addition to, building sites, new buildings and extensions (including architects fees and expenditure for competitions);
- b) expenditure on integrated library systems (hardware and software);
- c) all other capital expenditure including furniture and equipment.

Collections and equipment acquired for a new or extended library building should normally be entered as capital expenditure, not as operating expenditure.

#### **6.6.3 Income and funding**

The following should be counted (in each case including funding for capital investment):

- a) funding from the library's own institution or parent authority;
- b) funds from other public sources;
- c) funds from corporate and private sources (including donations);
- d) special grants;
- e) income generated, i.e. the income generated by library operations and from fees, charges, subscriptions and donations, that is available to the library for expenditure.

### **6.7 Library staff (at the end of the reporting period)**

#### **6.7.1 General**

In counting library employees, the concept of full-time equivalent (FTE) should be used to convert figures for the number of part-time workers to the equivalent number of full-time workers.

**EXAMPLE** If, out of three persons employed as librarians, one works quarter-time, one works half-time and one works full-time, then the FTE of these three persons would be  $0,25 + 0,5 + 1,0 = 1,75$  librarians (FTE).

#### **6.7.2 Total staff**

The following should be counted:

- a) total number of persons employed by the library;
- b) number of employees (FTE);
- c) of b), the total number of staff being funded from sources outside the library's own institution or parent authority (FTE).

**NOTE** Volunteers are excluded.

#### 6.7.2.1 Professional staff

Count the number of professional staff members (FTE).

#### 6.7.2.2 Qualified specialist staff

Count the number of qualified specialist staff members (FTE).

#### 6.7.2.3 Other staff

Count the number of other staff members (FTE).

NOTE Within this category, there can be a separate count of library employees who work in security and on domestic duties, for example: cleaners, porters, caretakers and catering staff.

#### 6.7.2.4 Student assistants

Student assistants are generally employed on an hourly basis. The total hours per year that student assistants have been employed should be converted to full-time equivalents (FTE).

#### 6.7.3 Volunteers

Count the number of voluntary non-remunerated assistants (FTE).

#### 6.7.4 Staff training

The following should be counted:

- a) number of attendance hours of staff members at formal staff training (during the reporting period);
- b) number of staff who have received formal training (during the reporting period).

NOTE 1 Formal training is defined as pre-planned lessons which can be held in-house or externally, and delivered by library staff or external experts.

NOTE 2 Informal training, e.g. point-of-use training, is excluded.

#### 6.7.5 Professional education

The following should be counted:

- a) the number of students/trainees in librarianship and/or information science or related fields that have received formal training by the library (during the reporting period);

NOTE Students/trainees can be educated during the whole reporting period or only in short-time courses.

- b) the time of education of all students/trainees counted in months.

EXAMPLE If three persons have been educated during the whole year and three persons only for one month each, the total months would be 39.

#### 6.7.6 Staff allocation to service areas/working areas

Total staff calculated in [6.7.2](#) may be allocated to the following main services of the library:

- a) user services — includes the following functions: lending, reference and information, interlibrary lending, user training, reprography, shelving and retrieving items, services for special user groups;
- b) media processing — includes acquisitions and cataloguing, licensing negotiations, technical book processing, binding;

- c) electronic services — includes planning, maintaining, providing and developing IT services and technically developing and improving the library's web-based services;
- d) administration — includes management, planning and steering, budget control, staff management, statistics, marketing;
- e) all other services — includes events and exhibitions, projects, conservation/preservation, digitization, etc.

The total of a), b), c), d) and e) should be equal to total staff as calculated in [6.7.2](#) (FTE).

The number of library staff employed in a service area is calculated by adding the time spent by all permanent and temporary staff, including project-based staff, on that service area. Several methods are possible:

- a) Estimate: Calculate the number of full-time-equivalent positions directly assigned to a specified service area. Estimate the average time spent by employees of that service area on other services and deduct the time from the number. Estimate the average time spent by employees of other service areas spent on the service in question and add the time to the number of FTE positions.

EXAMPLE 3,5 FTE staff are directly assigned to interlibrary lending. During the reporting period, they spent 10 % of their time in the reference service. Staff members from the lending service (8 FTE) spent 20 % of their time in interlibrary lending. Total FTE for interlibrary lending was then  $3,5 - 0,35 + 1,6 = 4,75$ .

- b) Time logging: Choose a sampling period (normally one or two weeks) during which the service in question experiences average workload. Record the time, by work diaries, that staff members, including members of other areas, spend on the service area in question. The sample counts are grossed up to FTE numbers for the reporting period.

### 6.7.7 Staff allocation to special services

In addition to the staff allocation to the main service areas as described in [6.7.6](#), the staff time that has been spent on a specified service during the reporting period can be assessed with the methods described above, preferably by time logging. The staff time spent for a specified service should then be calculated as percentage of total staff time as calculated in [6.7.2](#).

NOTE This calculation will be especially important for services outside the library's daily routine or prescribed tasks and/or with extra financing, for which the library has to show input and output.

#### 6.7.7.1 Staff time spent on cooperative projects

This includes the following activities:

- planning, organization, negotiations with partners, accounting, reporting, and the individual project work.

#### 6.7.7.2 Staff time spent on events

This includes the following activities:

- planning, organization, negotiations with partners, designing and arranging the event, accounting, entrance control and monitoring, etc.

#### 6.7.7.3 Staff time spent on preservation/conservation

This includes the following activities:

- planning and management of in-house or contracted activities, selection, evaluation and preparation of originals, technical processes (cleaning, repairing), quality control and statistics.

#### 6.7.7.4 Staff time spent on digitization of analogue materials

This includes the following activities:

- planning and management of in-house, contracted or cooperative projects; selection, evaluation and preparation of originals; technical processes (image creation, image editing); post-processing (e.g. optical character recognition, OCR); quality control of the imaging process; assignment of metadata; file management (organization, storage, access and maintenance of images and related metadata); rights management and assessment and implementation of long-term plans for digital preservation.

#### 6.7.7.5 Staff time spent on services for mobile devices

This includes the following activities:

- planning, developing, formatting, maintaining.

#### 6.7.7.6 Staff time spent on interactive services

This includes the following activities:

- planning, developing, organization, negotiations with social networks, designing or changing contents for the services, answering posts, etc.

#### 6.7.7.7 Staff time spent on library evaluation

This includes the following activities:

- planning of evaluation activities, data collection for statistics and performance measures, cost analysis, user surveys and interviews, staff surveys and interviews, complaint management, benchmarking, impact assessment, reporting.

NOTE The development of strategic goals and service standards is not included.

#### 6.7.7.8 Staff time spent on preparation of training lessons

This includes the following activities:

- development and updating of presentations and hand-outs for face-to-face lessons, development and maintenance of web-based training materials, preparation of user guides and self-help guides for library orientation, information skills and use of resources.

NOTE These activities should be excluded from [6.2.11](#).

#### 6.7.8 Library staff in institutional committees

Count the number of formal seats on boards and committees of the parent institution (e.g. the university, the municipality) that are filled by library staff, at the end of the reporting period.

NOTE 1 Only seats in formally constituted longer-term boards and committees are included. Participation in ad-hoc groups and/or informal groups is excluded.

NOTE 2 If one staff member sits on several boards/committees, count each separately.

## Annex A (informative)

### Recommended categories for further statistical analysis

#### A.1 General

In addition to the statistical categories defined in [Clause 2](#), this annex recommends categories for additional analysis. It is recognized that many of these categories are capable of subdivision according to local and/or national needs and this is to be encouraged. The categories in this annex are those recommended for the purposes of international comparisons.

When further categorization is undertaken, take care to ensure that the appropriate definitions are used for each count so that the totals for the subcategories are capable of being aggregated to provide a reliable count for the categories given in the main text of this International Standard.

#### A.2 Extensions of given categories already defined in the main standard

##### A.2.1 Library use and users

###### A.2.1.1 Types of users

The number of users and uses may be differentiated according to the type of user.

A public library could categorize the following user groups:

- a) individual user:
  - child (up to and including age 13);
  - young adult (from 14 up to and including age 18);
  - adult;
  - senior (> 65 years);
- b) institutional user;
- c) library staff;
- d) other target groups, e.g. users served at home.

NOTE 1 Further subdivisions can be made as to gender, profession and type of institution.

NOTE 2 Other libraries are counted separately.

NOTE 3 External users could be counted separately.

For a library of an institution of higher education, the subdivision could be as follows:

- undergraduate student (full-time/part-time);
- graduate student (full-time/part-time);
- faculty/research staff;
- library staff;

- professional user (personal/corporate);
- other external users.

NOTE 1 Further subdivisions for a), b) and c) can be made by faculty.

NOTE 2 Other libraries are counted separately.

For a school library, the following categories could apply:

- 1) pupils;
- 2) teaching staff;
- 3) other users.

#### **A.2.1.2 Other categories of loans**

To analyse loans, use the categories specified for stock, additions and expenditure in A.2.2.

The following categories can also be counted:

- a) number of short loans (less than three days, and included in loans in [6.2.3.1](#));
- b) number of physical units of material delivered regularly to organizations as a deposit for their members (not counted as loans in [6.2.3.1](#) because outside the definition in [2.2.19](#)); loans out of deposits are counted by the organization that registers the loan, i.e. that has received the deposit;
- c) number of loans to adults;
- d) number of loans to children.

#### **A.2.1.3 Reference questions**

Reference questions may be subdivided into the following:

- a) retrieving specific documents (in the library or in catalogues, databases, bibliographies);
- b) advice on sources or reading for a certain subject/topic;
- c) requests for special facts, data, etc., provided by the librarian;
- d) advice on software that the library offers to users (e.g. bibliographic tools);
- e) value-added information service (exceeding a certain time limit, possibly with fees).

In the case of several aspects of one question, the main topic should be decided on.

#### **A.2.1.4 Informational questions**

Informational questions may be subdivided into the following:

- a) directional questions, including e.g. questions for locating staff or facilities;
- b) administrative questions, e.g. regarding opening times and registering procedures or about handling equipment such as printers or computer terminals.



## A.2.2 Collections and expenditure

### A.2.2.1 Introduction

The main text of this International Standard subdivides as to types of resources. In addition, it is recommended that stock, additions and expenditure be subdivided as in A.2.2.2 to A.2.2.6.

### A.2.2.2 Subject

Count the number of physical units and /or titles in the collection and the additions differentiated as to subject categories.

For public and school libraries, the following broad categories are recommended:

- a) by topic:
  - fiction;
  - non-fiction;
  - reference.
- b) by target group (public libraries only):
  - adult;
  - children (up to and including age 13).

The topic and target group could be combined (e.g. adult non-fiction).

For all types of libraries, the following classification is recommended:

- general, reference;
- theology and religion;
- language and literature;
- philosophy, psychology, biography and history;
- art, design, performing arts, architecture and sports;
- biological science and chemistry;
- medicine (including clinical, pre-clinical, allied to medicine);
- physical science (including geo-sciences);
- engineering and technology;
- mathematics, computing and information technology;
- social science;
- education;
- business and management;
- law.

#### **A.2.2.3 Mode of acquisition**

Count the number of physical units and/or titles added by:

- purchase and licensing;
- exchange;
- donation;
- legal deposit right.

NOTE The total amount of licensed titles of eBooks or electronic serials should be counted separately.

#### **A.2.2.4 Country of production**

Count the number of physical units and/or titles added and/or the acquisition expenditure for:

- the national production;
- the production of all other countries.

#### **A.2.2.5 Language of document**

Count the number of physical units and/or titles added and/or the acquisition expenditure for:

- materials in the national language(s);
- materials in all other languages.

NOTE Public libraries in particular could separate “all other languages” into cultural groups.

#### **A.2.2.6 Electronic collection**

Count the number of titles and additions by mode of acquisition:

- purchased;
- licensed;
- digitized from the analogue collection;
- free Internet resource, made available via the library's online catalogue.

The subdivisions above should, if chosen, be applied to stock, additions and expenditure.

#### **A.2.2.7 Access and facilities**

Count the number of catalogue records added during the reporting year (see [6.4.5](#)) by subsets:

- copy cataloguing (records bought or taken over from other sources);
- original cataloguing;
- retrospective cataloguing;
- subject cataloguing and/or adding a classification number.

### **A.3 Further categories (not included in the main text of this International Standard)**

#### **A.3.1 Introduction**

Other aspects of collection and service may also be counted to reflect special types, tasks and/or stocks of libraries.

#### **A.3.2 Doctoral dissertations**

Count the number of titles and additions by format (appropriate for libraries of an institution of higher education):

- print;
- microform;
- electronic form.

#### **A.3.3 Government documents**

Count the number of documents and additions by format:

- print;
- microform;
- electronic form.

#### **A.3.4 Rare materials collection**

Typically, count physical units and additions in these categories:

- a) rare books (published up to and including 1800);
- b) rare books (published after 1800);
- c) incunabula;
- d) manuscripts:
  - Latin script;
  - non-Latin script;
  - fragments and rolls;
  - autographs;
  - music manuscripts and autographs;
  - archives and records concerning private persons, institutions and organizations (collections containing manuscripts, letters, notes, photographs, and other material given by bequest to the library or purchased as such by, or on behalf of, the library).

NOTE Illuminated manuscripts without text are assigned to Latin or non-Latin script according to their context of origin.

In some countries/regions of the world, other categories might apply.

### A.3.5 Indexing

Count the number of records indexed for bibliographic services and databases.

NOTE The number of records produced for the national bibliography by the national library should be counted separately.

### A.3.6 Documents in institutional repositories

Count the number of documents in institutional repositories, if the library is involved in collecting the items and/or operating the repository.

The following should be counted as to the contents of the repository:

- a) number of archived documents, e.g. journal articles, theses or doctoral dissertations, conference papers, reports, preprints, learning material, datasets;
- b) number of those with unrestricted access;
- c) number of documents added during the reporting period;

NOTE 1 Learning material and datasets could be counted separately.

NOTE 2 A dataset is counted as one document.

- d) number of items held as bibliographical records only;
- e) number of records without documents added during the reporting period.

The following should be counted as to the use of the documents:

- number of accesses to the repository;
- number of downloads of content units (complete documents or parts of documents).

### A.3.7 Publishing activities of libraries

Count the number of documents (titles) published by the library during the reporting period.

NOTE 1 The library is responsible for the complete publication of the document. Publishing activities are managed by the library itself or by a publishing service under the administration of the library. Co-editions are counted separately.

NOTE 2 Minor publications such as leaflets and brochures and occasional publications issued purely for commercial, business or intercompany purposes, for traffic purposes or private, domestic or social purposes are excluded.

NOTE 3 Documents can be published in analogue or digital format, or can be printed on demand.

NOTE 4 Documents where the library is only involved in collecting the items as well as in disseminating them by means of institutional repositories are counted in A.3.6.

NOTE 5 Items from the analogue collection that have been digitized for preservation and dissemination purposes are counted in [6.5.5](#).

### A.3.8 Services for schools and pre-schools

#### A.3.8.1 General

Many public and academic libraries cooperate with local schools and pre-schools by offering services targeted at specific age groups or forms. The main aim is to promote the scope and usefulness of the library's resources and services to children and to further information literacy.

The services will usually be one-time activities or events, but can also stretch over some time such as a reference service for pupils when writing their papers.

NOTE 1 Services of public or academic libraries for school libraries are excluded.

NOTE 2 Regular delivery of materials to a school as a deposit is dealt with in A.2.1.2.

Services provided for schools or pre-schools will vary according to need, but usually include the following:

- guided library tours;
- introductions into library use;
- training on materials and databases that are relevant for special classes or courses.

#### **A.3.8.2 Services**

The following should be counted:

- a) the number of activities or events that have been arranged by the library for schools or pre-schools during the reporting period;
- b) the number of attendances at the activities or events during the reporting period.

## Annex B (informative)

### Grossing up

#### B.1 General

This annex refers to the compilation of national statistics and other aggregated statistics. In order to maintain comparability between sets of statistics, and over time, data sets must be complete.

Where the actual data returns are unavoidably incomplete, it is necessary to supplement the actual returns with estimates that provide the best representation of the complete picture. This process is commonly called “grossing up”, and may be achieved in one of several ways. Which method is used may depend on the statistics to be calculated and the completeness of the available data.

Three primary methodologies can be defined, as given in B.2, B.3 and B.4.

#### B.2 Method 1: According to the population to be served

Calculate the ratio between the total user populations of those libraries supplying data and all libraries in the system, and apply this to the known data.

##### EXAMPLE 1

Suppose only 12 out of a total of 15 libraries have supplied data, but the user population is known for all libraries.

If total population for all 15 libraries = 200 000

and the total population for those 12 libraries providing data = 150 000,

then the grossing up factor to be applied to the available data is:

$$\frac{200\,000}{150\,000} = 1,33$$

If the total data supplied by 12 libraries = 300 000,

then the estimated total for all 15 libraries is:

$$1,33 \times 300\,000 = 399\,000$$

#### B.3 Method 2: Based on the previous year's data

Calculate the percentage change between last year and this year for those libraries supplying data in both years, and apply this to the figure for last year for those libraries not supplying data this year. This estimate should then be added to the known data for this year to obtain an estimate of the total for all libraries in the system.

##### EXAMPLE 2

Suppose out of a total of 15 libraries

- 10 of the libraries supplied data in both 2010 (last year) and 2011 (this year);
- three did not supply data in 2011, but did so in 2010;

— two supplied no data in 2010, but did so in 2011.

Then:

	<u>Total for 2010</u>	<u>Total for 2011</u>	<u>Percentage change</u>
Total supplied by <b>12</b> libraries in 2011		250 000	
Data supplied by those <b>10</b> libraries with data in both years	200 000	220 000	$\frac{220\,000}{200\,000} = 110\%$
<b>Three</b> libraries with no data in 2011	15 000	$15\,000 \times 110\%$ $= 16\,500$	
Estimate for all 15 libraries in 2011		$250\,000 + 16\,500$ $= 266\,500$	

#### B.4 Method 3: Based on other available data

An estimate for a missing variable may be made from data supplied for another variable. For instance staff costs (missing) may be estimated from staff numbers (supplied) by using an average cost per member of staff from other respondents.

##### EXAMPLE 3

Suppose Library A provided a figure of 1 000 books purchased during the year, but was not able to provide data on the related expenditure.

If the remaining libraries provided both figures, giving a total of 20 000 books purchased at a total cost of EUR 150 000, then:

Average cost per book: EUR 150 000

20 000 = EUR 7,50

Estimated spend by Library A:  $1\,000 \times \text{EUR } 7,50 = \text{EUR } 7\,500$

Estimated total expenditure for all libraries:  $\text{EUR } 150\,000 + \text{EUR } 7\,500 = \text{EUR } 157\,500$

#### B.5 Variations

Variables other than the user population may be used as weights in Method 1, and may be more appropriate in some circumstances. As a last resort, and if no other options are possible, the number of libraries can be used (i.e. a ratio of 15/12 in Example 1).

The calculations may be carried out separately for sets of libraries in different categories (typically by size) with the results then accumulated for the sector.

A combination of these methods may be used as appropriate.

Special procedures may be called for where missing data are concentrated in untypical libraries. Such “untypical” libraries may, for example, be university libraries catering only for postgraduate students or film libraries with relatively small collections of printed material.

The extent of estimation should be indicated in the published statistics with a note to explain the procedure(s) adopted.

## Annex C (informative)

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