



Commission of the European Communities

information management

Library statistics for policy-making

Report
of a workshop held in Luxembourg
1 February 1988



Report

EUR 11894 EN

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Directorate-General
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PREFACE

The context for the workshop

During the course of 1986, DG XIII-B of the European Commission undertook a number of fundamental studies on libraries in the European Community countries. Their purpose was to pave the way for a response from the Commission to the Council on whether or how it would be possible to put into effect the Resolution of the Council of Ministers of Cultural Affairs of 27th September 1985 (1) which requested the Commission to consider the desirability of swift action to help libraries.

One of the studies, codenamed LIB-1/ECON and entitled "A Study of the Library Economics of the E.C." (2), entered hitherto uncharted and treacherous waters in attempting to put figures to libraries in the EC and to discover as much as possible about their budgets and the scale of their activities. Naturally, in commissioning the study, DG XIII-B had been mindful of the difficulties inherent in the task and thus wished, before publication to discuss the study with a wider circle of experts to inform them of its existence and to have the benefit of their views on its wider applications beyond its primary purpose. This was done at the Workshop held 1st February 1988 in Luxembourg. The workshop was divided in 2 parts : a series of presentations and a panel discussion. In view of the quality and importance of the papers given, it was decided to publish this account of the Workshop.

There was a remarkable unanimity amongst the experts present about the quality of this pioneering work and the value of aiming to harmonise some EC library statistics. What is more, practical suggestions were made as to how this task might be undertaken. It is too early to point to practical moves in this direction but when the time is ripe this Report should provide a firm platform on which to build.

1. OJ C271/1 of 23.10.85
2. Ramsdale, Phillip A Study of the Library Economics of the EC, Office for Official Publications Office of the European Communities, Luxembourg, 1988 (EUR report number: EUR 11546)

SUGGESTED FOCUS FOR THE PANEL DISCUSSION

QUESTION 1

Given that the state of library statistics in many Member States leaves much to be desired, would an effort to improve the collection and dissemination of internationally comparable library statistics of EC countries be considered useful and what benefits could be expected from it ?

Background

- 1.1. Given that the data to be provided by the LIB-1 ECON study was considered to be essential background to the formulation of a plan to help libraries, it could be argued that a continually updated bank of key statistics would be needed to support a continuing action programme though there could be problems in agreeing which data were essential for this purpose. At national level even basic data without which no policy can be monitored are sometimes unavailable (eg. how many staff, how much money). Equally, requiring certain statistical outputs from libraries can lead to better management of the libraries themselves so that the collection of statistical data can become an instrument for the implementation of policy leading to improvements in efficiency or effectiveness. EC action could also provide a stimulus to action at national level. International comparisons, carefully used, can also lead to improvements in national policies which also lead to greater efficiency or effectiveness.

QUESTION 2

Supposing that it is considered beneficial to improve library statistics and particularly their international comparability, is there a necessity for the EC to take an initiative or could the task be accomplished by existing agencies, either those represented at the seminar or others, and why ?

QUESTION 3

If it is agreed that an EC initiative is required, what exactly are the problems to be tackled and how could the task be best approached ?

Background

3.1 Problems

Perhaps the main problem for purposes of international comparison is that countries do not or cannot apply the standard definitions. Other problems identified by UNESCO (in a world-wide context) are that :

- i Hardly any country has a central agency responsible for library statistics,
- ii Few countries have a statistical system equipped to undertake regular, systematic and comprehensive data collection in the library field,
- iii Periodicity of surveys often fails to coincide,

The LIB-1 ECON study identifies additional particular difficulties in the EC context :

- iv Financial statistics are particularly hard to obtain and where they exist are often inconsistent with activity data,
- v Some library sectors are particularly poorly documented (school libraries, special libraries and other major non-specialised libraries) and are perhaps outside the scope of government departments responsible for library policy.

QUESTION 4

If it is accepted that there are problems susceptible to solutions at EC level what kinds of actions are most necessary and most likely to succeed ?

Background

4.1 Actions likely to provide solutions,

Possible actions have been suggested as follows :

- i It had been recommended to UNESCO in a world-wide context to establish a network of regional clearing houses to act as resource centres on the mechanics and modalities of data collection ;

LIB-1 ECON recommends that the Commission :

- ii Promote discussion amongst EC countries on the practicability of assembling financial data consistent with activity data ;
- iii Give priority to the collection of data for the sectors public libraries, national libraries and libraries of institutions of higher education;
- iv Initiate a forum for the wider development of EC library statistics and to act as agent for the provision of data to other organisations. A register of library statistical sources would be needed to support its work. (Very similar to i. above) ;

- v Continue to monitor the structure and volume of library funding in the EC and initiate action leading towards a standard form of accounts for libraries.

18th January 1988

DAVID FUEGI
Consultant to CEC/DG XIII-B

REPORT ON THE WORKSHOP
Library Statistics for Policy Making
Held in Luxembourg
1st February 1988

1. BACKGROUND

The workshop informally brought together for one day 20 experts in the field of library statistics to discuss the report "A Study of the Library Economics of the EC" (LIB-1/ECON). The study was conducted on behalf of the Commission by Phillip Ramsdale of IPF Ltd in 1986/7 to inform the preparatory phase of the task accepted by DGXIII-B of responding to the Resolution of the Council of 27th September 1985 (OJ C271/1 of 23.10.85), which requested the Commission to "consider the desirability of swift action to help libraries".

The purpose of the workshop was to discuss the findings and recommendations made in the study with a view to :

- assessing their validity in order to provide the Commission with guidelines for further effort in this field if necessary;
- making the result of the study known to experts and administrators in the Member States;
- starting a process which could eventually improve the availability, reliability and usefulness of library statistics for decision-making at EC, national and regional levels;
- evaluating the possibility of contributing to the normative process in the collection and exploitation of library statistics presently in progress via international organisations such as UNESCO, IFLA and ISO TC/46.

2. METHOD OF WORKING

2.1 The programme.

The Workshop was chaired by Mr C. Leamy of the Office of Arts and Libraries. Mr Leamy was the chairman of PAG/CIDST (Programme Advisory Group of the Committee on Information and Documentation in Science and Technology), committee which has been advising DGXIII-B for many years and had approved the group of studies of which LIB-1/ECON forms part. Mr Leamy is also the former chairman of the UK Committee on Public Library Statistics.

Arlane Iijon who has responsibility within DGXIII-B for the libraries project provided the necessary background to set the Report into context.

Mr Morten Hein whose duties as head of division in the Directorate for Public Libraries of the Danish Ministry for Cultural Affairs and Communications include standardisation and statistics, gave the keynote address. In his paper Mr Hein, who has wide experience through ISO and NORDINFO of the international aspects of library statistics, emphasised the public's interest in libraries and the role of statistics in contributing to satisfying this legitimate interest. He pointed out that library statistics are only revealing when compared with other library statistics - i.e. time series of the same library or comparisons with other libraries - but then only if the comparisons are indeed valid. To make them valid significant variables must be controlled or explained. Turning to the IPF report which he regarded as a major achievement, Mr Hein thought its importance lay in making EC libraries visible both as an industry in their own right and as a significant market for information products. The way forward for improving the quality of library statistics for use in international comparisons lay in increased standardisation and the NORDINFO application of ISO 2789 showed a viable way forward.

Mr Phillip Ramsdale, the author of the report, gave a brief summary of its content and the methodologies used to arrive at the EC aggregate figures. He stressed the need for caution in the interpretation of the data.

As UNESCO is the only body producing international library statistics, it was appropriate that Mr Karl Hochgesand of the UNESCO Office of Statistics should next give an account of UNESCO's achievements in this field since the 1950s and the problems they regularly experience.

Dr Karl Neubauer, chairman of ISO TC/46 which has recently produced a new draft of ISO 2789 "International Library Statistics" gave an account of relevant ISO work and outlined the possibilities and limitations of standardisation in this field.

Mr Roy Walker of the EC Statistical Office, Directorate for demographic and social statistics, then gave an account of the work of his department and explained how it worked through three-year plans which defined the work items for the period.

Speakers allowed time for brief periods of discussion.

After lunch Mr I. Hoel of the Royal Library in Copenhagen informally presented the work of NORDINFO in harmonising the library statistics of the five Nordic countries. The first set of "harmonized" statistics is expected to be published in 1989. An English translation of the NORDINFO Guidelines was requested by the participants and will be prepared with the help of the Commission.

This was followed by a plenary discussion period which focussed on four questions outlined with some background in a document tabled at the beginning of the workshop.

Participants were also asked for their opinion of the LIB-1/ECON report and on the best method of disseminating it widely.

2.2 Attendance

Experts were invited from all EC Member States. Attendance was excellent and only the Portuguese expert was unable to be present. Care was taken to ensure that amongst the experts were members of the committees of the relevant IFLA sections. Some participants combined ISO experience with expertise or responsibility at national level.

3. SUMMARY OF CONCLUSIONS

3.1 Overall opinion on the Report and how it should be disseminated

All present were mindful of the author's own warning about the care needed in using individual figures in the Report but nevertheless regarded it as a major achievement and a landmark in its field. The Report was considered valuable not only for the wealth of information on EC libraries it contained but also for highlighting the problems to be solved at national and international level before valid international comparisons could be made.

Participants advised the Commission to make available a certain number of copies of the report to experts and policy makers in the Member States as soon as possible and at the same time to publish it for other interested bodies or individuals.

3.2 The panel and plenary discussion followed the structure suggested in the short paper prepared for the purpose from which the four main questions are quoted below.

3.2.1 "Question 1 : Given that the state of library statistics in many Member States leaves much to be desired, would an effort to improve the collection and dissemination of internationally comparable library statistics of EC countries be considered useful and what benefits could be expected from it ?"

Though the fact that statistics can be misused could not be ignored, there was general agreement that :

- statistics would be used in any case to make international comparisons and that the dangers inherent in this were best minimised through improved standardisation and harmonisation;
- as considerable effort was already expended by many Member States to collect library statistics it was highly desirable that some small additional effort should go into making some key figures internationally comparable thus increasing the value of work already done;
- such action would permit the debate to be conducted on a more solid basis of fact.

The experts present advised the Commission that an international initiative in this field could stimulate action at national level in some Member States in the field of standardisation and collection of library statistics. Such action could provide a subtle but powerful stimulus in three main directions :

- towards improved library management at the local level;
- towards more rational policy choices at national level;
- to facilitate the spread of knowledge from one country to another.

It was noted that key statistics intended for harmonisation between EC countries should include at least some required by librarians themselves as well as those best able to present an EC-wide picture. Some experts also stressed the need to pay attention to performance indicators. All thought it self-evident that countries would require more data for domestic use than was needed on an international basis. There was solid support for action to improve the collection and dissemination of some comparable library statistics of EC countries.

3.2.2 "Question 2: Supposing that it is considered beneficial to improve library statistics and particularly their international comparability, is there a necessity for the EC to take an initiative or could the task be accomplished by existing agencies, either those represented at the seminar or others and why?"

The representatives of the organisations active in the field indicated that none of them was in a position to intervene directly. Dr Neubauer made clear that ISO's role is confined to the preparation of standards. Conceivably the work might be extended to cover some financial data elements at some future date. Mr Hochgesand confirmed that though UNESCO can do no more than carry out its existing commitments in this field it would welcome an initiative to improve the quality and coverage of data for particular regions. Mr Daumas explained that IFLA works to support UNESCO's efforts and could not take any operational role in relation to EC countries. Mr Walker pointed out that the EC Office of Statistics can only take on new tasks following a strict sequence of procedures, a process which could not even be initiated in the absence of an official EC policy for libraries.

Considering the many possible benefits from an initiative in this field, those present strongly advised that action from the Commission of a stimulatory and pump-priming nature was needed now. In the longer term continuity could only be assured if a suitable stable and committed agency could be found to take on the work. It was suggested that the possible EC-wide professional focus, discussed at a meeting convened by the Library Association with Commission support in London in August 1987, could potentially be a suitable body to take on such work.

3.2.3 "Question 3 : If it is agreed that an international initiative is required, what exactly are the problems to be tackled and how could the task be best approached?"

After some discussion of the difficulties involved and of the solutions evolved in the NORDINFO context, it was agreed that the aim should be to achieve the harmonisation of the definitions of a few key data elements of international interest. The data should be collected as part of the national data collection activities, then collated at EC level and published with an appropriate commentary. It was thought that some order of priorities between the 6 library sectors (according to the UNESCO definition) might need to be determined.

Having regard to the recent NORDINFO experience, it was recommended that the following steps be taken :

- carry out a survey to find out what is being collected in Member States already, including methodologies, definitions and periodicities and building on the work undertaken for LIB-1/ECON;

- decide what data elements to aim to harmonise and elaborate the ISO definitions using local examples;
- prepare implementation handbooks and guidelines for use by national data collection agencies.
- extract from national data bases the harmonised key indicators and publish them with a commentary.

The implementation of such a programme would depend for an initial period on the Commission's ability to stimulate action by financing the preliminary studies and surveys needed.

- 3.2.4 "Question 4. If it is accepted that there are problems susceptible to solutions at EC level, what kinds of actions are most necessary and most likely to succeed?"

Though this question had substantially been answered in the discussion on the preceding point, delegates reiterated that there would always be a need for countries and libraries to collect the data which they themselves required. Harmonisation should be attempted only for a small number of key data elements useful for international comparisons. These should include if possible some intermediate output indicators (i.e. activity data) and data relating to issues of current concern. Provision needed to be made for their periodic revision and updating.

4. CONCLUSIONS AND SUMMARY

In summary it can be concluded that :

- The workshop demonstrated a remarkable unanimity in the views of the experts present.
- The LIB-1/ECON report was welcomed and recommended for wider dissemination.
- The Commission was informed that further work in this area would be valuable and advised how it could be undertaken.
- It was agreed that although the circumstances prevailing in the EC countries differ in important respects from those in the Nordic countries, the Commission should build closely on the NORDINFO experience in progressing the work of harmonizing key library statistics.

March 1988

MORTEN HEIN

LIBRARY STATISTICS FOR POLICY MAKING

Keynote address by Morten Hein

Morten Hein is head of division in the Directorate for Public Libraries, part of The Ministry for Cultural Affairs and Communications in Copenhagen. He works with data processing, information systems, standardization and statistics.

Overview

I will begin with an introduction on how boring library statistics is. Then I have to make a few comments on theory, mainly because I find it rather important. But that leads to the question: What is the use of library statistics?

This leads to the IPF report and its possible uses.

It would then be rather foolish not to discuss further action. Under this heading I shall mention ISO 2789, whatever that might be, and a Nordic experience - just for your entertainment.

I shall end up with a conclusion, where the keywords will be: The library made visible.

Introduction on how boring library statistics is

When I run statistical programs, I can stand in front of the printer, seeing tables appearing. Then I sometimes quote John Keats: A thing of beauty is a joy forever. But what a weird mind to compare statistics to Keats. It is of no use. It is only figures, which only the computer and I can love. What appeal could there be to a broader audience?

Nevertheless my figures have several times caused headlines in the Copenhagen newspapers and I have appeared on the television news discussing figures of library statistics. So apparently I share this boring interest with quite a number of people. Why?

Because library statistics measure dangerous operations. Libraries are part of a nation's cultural activities and culture tends to be the most controversial part of the public life of a nation. If the national defense or the social security system got as many headlines per 1 million of any kind of currency in expenditures as cultural affairs, the daily papers would need to be enlarged quite a bit.

Cultural issues tend to have more impact on your life and future than most others, even if the economy has a rather important role, too. That's why we can feel the breath of the public just behind us. As libraries are important and controversial, it is natural to compile statistics - even boring figures - as a documentation of activities, because we want to survive - but mostly because the public has the right to observe and control our dangerous activities.

In areas where human rights are restricted, one of the first rights to be destroyed, is the right to give and receive information. Libraries are the wholesalers of information. Every society needs us, and has a right to ensure that we handle our task well, according to the democratic demands of the society.

And now the theory

Statistics are numerical expressions, but what do the numbers express? Let me give an example: I take the number 31. What does this number tell us? Nothing. A brief analysis reveals that it is a relatively small integer, and a prime number - to make it neutral to further analysis. But 31 could describe something. If I say '31 bananas', then you have a quantity of something understandable. But the expression '31 bananas' could be taken further. You could go into details in the qualification: Is it ordinary bananas from the West Indies or could it be the pink bananas from the Fiji Islands? It is perhaps not important on the level we want to observe. But it is perhaps important whether the expression '31 bananas' describes what I had for lunch yesterday or the turn-over last year in my banana wholesale plant. The effect in both cases would be dramatic, but would of course be of a different nature.

And so it is in library statistics, too. It is not enough to say that you have a certain amount of books or of circulation. It is not sufficient to put any figure into a context where it is supposed to be useful information that could be used for management or policy making. To interpret any figure you must have a theory to indicate whether a certain figure should be considered good or bad. Like this: An apple a day keeps the doctor away. It is a rather limited theory to my mind, describing only the cases of one and zero. 20 apples a day would surely bring the doctor back again.

We have but few theories in libraries, even though we have a discipline called "Library science". Librarianship is a craft, not a science. Sometimes however it is confusing, because we have turned the craft into an industry. Don't be too happy about the term "science". Remember that Dewey has a class called 'domestic science'.

If we don't have theories we will have to stick to the old joke of making comparisons: My father is bigger and stronger than your father. Nice for the one family if the fathers are going to fight. That your library is bigger than mine means nothing, because it is not the purpose of libraries to fight.

Then we have to define what we are measuring. It is important to observe, that we are measuring quantities and not qualities. Quantities of resources and related performances, not qualities, even if we sometimes believe, that big is beautiful and bigger means better quality. Library "A" could be bigger than library "B", but could be too little for the role it is expected to perform. A large staff could indicate, that you can provide high class services, but it could also indicate, that you are overstaffed. Being unable to provide expressions of quality we sometimes rely on normative expressions e.g. circulation per 1000 inhabitants. It is acceptable if you choose the right normative expressions, but remember that dividing one figure by another is the most dangerous game in mathematics.

There are a few more problems. Who are you aiming at with a particular statistical product ? The same findings could never be presented in the same fashion to the real professionals, to the management level, to the political level and to the general public. It is a matter of details and form of presentation. Personally I try to aim somewhere between the management level and the political level, thereby often being criticized by the professional level, and always being not understandable for the general public, except in special generalized presentations. To me it is a natural approach, and I would find it extremely complicated to do statistical presentations without knowing my target group.

I hope that I have given you the impression, that library statistics is boring, and that we have expressions of no significance. And I have not even mentioned the problems of definitions of terms. Remember the West Indian bananas versus the pink ones ? Or the problems of defining the group to be the victims of certain measurements or the even bigger problems of having figures reported that - to a certain limit - express the real situation.

All this as an indication of how humble we all have to be in our work.

Which leads us directly to

The IPF report.

The IPF study according to the LIB-1/ECON contract should be well known to this audience. Most of us contributed in answering the questionnaire, and all of us have read it with great expectations. And what have we got ?

First of all, the most comprehensive report on international library statistics. By saying so, I have already revealed that I consider the report as a major achievement.

I have been using library statistics for more than 25 years and have been responsible for producing statistics for more than 10 years and I have never seen international figures in which I believed as much as in this report.

By saying so, I don't intend to downgrade the Unesco efforts, but on a global level I don't dare to foresee an achievement such as the IPF report.

It describes the situation in the 12 EEC countries with certain references to Canada, The United States and Sweden. I could have wished references to Finland, as that country is close in surpassing Denmark in overall figures per capita (remember my remarks on normative expressions).

Could all the 12 of us respond to the questions? Great Britain and Denmark have reported the highest number of figures. It does not necessarily mean, that we have the best statistical tradition or method, but that we have ways of doing our work, that conform better to the questionnaire.

Normally, and perhaps I should have mentioned it in the paragraphs on theory, we consider all figures as final and everlasting, but the more we work, the more we know, the more we realize that all figures are tentative and just approaches to the real world. Therefore the effort from IPF of extrapolating figure reported inadequate or totally missing is done very cleverly and should be appreciated. But I suppose that countries reporting smaller portions of the total questionnaire, in reality have bigger operation than even the IPF extrapolated figures suggest.

I have found very few formal faults or misinterpretations in the report. So the work can be considered of high quality. But what is the use of the information we have got?

I mentioned earlier, that we are talking on a topic where few theories exist, so that most judgements are based on comparisons. Does the report provide sufficient background information to discuss similarities and differences in the EEC countries? Yes, perhaps. And suddenly the situation is dangerous.

For my part I must admit, that my country seems to spend more money than any other EEC country on libraries and also achieve some benefits and good results. And what is the lesson? That the rest of you should envy us? Or that we are overdoing the job, and should relax a little and try to conform to an average?

The Danish government does not think that Danish libraries are put on an unrealistic level. But we have to admit, that we have a country with certain economic problems and that all, including libraries, have to adjust to the present and coming reality. But there is no specific observation of libraries overdone to the necessity of the society.

We have our priorities. and we should not interfere in the priorities of other countries. We must admit that our country is very small and without any natural resources. Our major resource is the brainware of the Danes. Like everybody else we are aiming towards the information society, and libraries are an immense tool in the information game.

If we are not talking about internal competition among the EEC countries, but are adopting a more global approach, then it is obvious that information services are major elements in situating Europe in a better position.

The issue should not be to bring Denmark and the other countries above the average down to average, but that every EEC country should reconsider their information systems, considering what the appropriate levels are.

Libraries are often accused of creating a need for their own services in the society. My observation is that the need for information comes from the demands of education, science, research and industry. Libraries try to keep up in fulfilling demands arising elsewhere in the society.

Libraries have often seen the situation where they are not trusted. They form an invisible string of institutions, and the outside world does not recognize their existence. Library users are mostly so happy that information services exist at all that they never form a lobby or a pressure group. They are keen followers, but not supporters in the traditional way. That is why libraries are invisible.

The IPF report can not only be used for inter EEC comparisons. It indicates an European overall size of the library market. And that is the prime virtue of the report. We are put on the map.

What does it matter, that we know that Danish libraries are one of the biggest mass media in the country, only surpassed by radio and television and perhaps newspapers - if we are not recognized as such.

We and libraries in other countries, need a renovation of our tools and methods, but where is the broad choice of information systems? Most existing systems are tailor-made and much too expensive for the mass library market. But the information systems providers have not recognized the market potential in the libraries. Outside the EEC the situation is a little better, particularly the North American situation, where a potential home market is recognized and provides a base for export ventures.

The IPF report reveals the size of the market-place. If this is made known we should foresee a much bigger interest in making our future information tools as local European turnkey solutions. After all, we constitute a European home market with an annual turnover of almost 4.500 million ECU.

This overall figure should interest the European media producers, too. We are a market to be nursed and cared for by the media producers. Sometimes the media producers feel, that the public media distributors, the libraries, are unfair competitors, of course with some mixed feelings, as we after all are good buyers, too.

In Denmark the situation in the printed media now shows that the commercial market and public distribution are twins. We each stimulate the other, and both sectors are increasingly inter-dependent. People borrowing from the library are the best buyers too.

The media producers should not be afraid of this recognized European market, but take the opportunity to adjust their production to supply this big and growing information market place.

If we look at the non-printed media, the situation is less settled. We see obstacles to the use of these media in libraries. Initiatives are required to produce solutions satisfactory to the copyright holders and to the library community. A prolonged trend of today indicates that libraries cannot enter areas like video-based information or information processing based information to a level like the printed media. Here again the indication of the market size shows the need for firm action to bring solutions.

My conclusion on the report is that it is extremely useful in identifying the size of European library market and in giving some hope for follow-up initiatives. To a certain degree it can be used to explore the differences among the libraries within the EEC, perhaps as a means to establish European guidelines for library services, if that is not too dangerous to mention.

Further action

IPF discusses certain possibilities to improve European library statistics and mentions obvious cooperation e.g. with UNESCO. A scratch in the surface of this fine report is that ISO is not mentioned. And ISO has a standard for library statistics, called ISO 2789. Fortunately this has been overcome and ISO is on the agenda for this meeting.

I should like to give an example on how a standard is to be implemented in a group of countries. The libraries in the Nordic countries have a natural wish to adapt an international standard such as ISO 2789. But how do you do it ?

It started with the wish to make an analysis of cultural statistics specially for libraries and museums in the statistical committee inside the Nordic Council of Ministers. The analysis showed that we all had the same scope and the wish to follow standards, but that we differ for factual reasons and that terminology had differences due to the different languages spoken in the Nordic countries. Then the issue was split up. The research and academic library sector made a project on uniformity through NORDINFO, a forum for cooperation in scientific information. Public libraries and school libraries were taken care of by the Nordic government institutions responsible for those libraries, e.g. my institution. We were assisted by the national statistics agencies.

These two projects have now been joined together and we are ready for an annual publication on Nordic library statistics, where the reader can be sure that all figures reported from one country can be interpreted in the same way as the figures from the other countries and that the same selection of figures appears from each country. All based on ISO 2789, where we have found ways to adopt the standard identically.

Strangely we achieved this in different ways. The research and academic libraries worked hard on definitions and terminology and ended up with a unanimous solution. Public libraries and school libraries had few differences of that nature, but they had the problems of describing differences caused by the differing infrastructure in the Nordic countries. They had to define a set of presentation tables to ensure that identical figures could be understood in the right way. I mention this to show that it is possible to adopt a standard and achieve a common interpretation and thus produce even more accurate figures than the IPF report.

Conclusion

I am now very close the end of this paper. I wonder if I should have gone into more details of lessons to be learned from the actual figures in the report. But as you have heard, I have concentrated on the difficulties involved in producing good statistics in order to explore the quality of the report. My conclusion is that the report is of high quality. After that I elaborated the overall findings and contemplated the use to be made from these findings. My final conclusion is that we have got valuable information to be used in planning for the best future for the library world. The report has made the European libraries visible.

PHILLIP RAMSDALE
Managing Director,
Institute of Public Finance Ltd,
UK

PRESENTATION AND EXECUTIVE SUMMARY
of the Report "A Study of the Library
Economics of the EC"

Undertaking a survey is rarely a simple matter and even less so when the exercise covers a wide geographical, administrative and diverse subject area such as this. The approach taken is explained in our report, but despite the warnings concerning the figures reproduced there, it is perhaps wise to reiterate these.

The primary objective of the survey was to assess the overall cost of libraries across the E.C. We have, of course, been able to estimate this, but this estimate is more likely to under, rather than over state the expenditures involved. Few of the contributors to the survey had the accountancy training or experience to be able to break down the form of the available accounts to the survey categories, and for this reason substantial overhead costs related to premises and administrative activities (in particular) may have been omitted.

The executive summary sets out the main findings. These fall under two broad headings : (1) Estimates of the scale of libraries activities; and (2) The latent problems which make the compilation of consistent and comprehensive data on libraries throughout the E.C. difficult.

In our work we have been assisted by David Fuegl and we are most grateful for this. The extent of the exercise truly seems daunting in retrospect, but now that the process has begun, and the problems identified, we hope that the usefulness of such information can be recognised, and the momentum which has been gained from this survey is used again in the not too distant future, to update and improve the estimates.

Chapter 1

EXECUTIVE SUMMARY

This summary provides an overview of the main findings of a study which we believe is the first to attempt to measure the costs of library services throughout the European Community. For a discussion of these findings, and further explanation of the points set out in this chapter, it is necessary to read the whole report.

1.1 Introduction

The purpose of this study was to attempt an up-to-date measure of the extent of library activities in the European Community (EC). We set out to build on the work of the United Nations Educational and Cultural Organisation (UNESCO), with their support and the use of their survey data to guide us. However, so as to advance the knowledge about libraries in the EC we have found it necessary to build on and collect more up to date figures than have hitherto been made available at a central level. We collected such data in our own survey, undertaken in late 1986 and early 1987. This exercise gave us an insight into the practicability of collecting information from the diverse sources throughout the EC using the accepted definitions describing library services. It is our hope that the publication of this report is seen as being timely by the International Organisation for Standardisation (ISO), which is concerned with the development of robust definitions for the description of those library activities we have described.

1.1.1 Survey Data

The six sector definitions developed by UNESCO, (National; Other Major Non-specialised; Public; Higher Education; School; and Specialised Libraries), were seen by us at the outset of the

study as a convenient and recognisable framework to use in the collection of internationally consistent data. However, the pattern of library provision throughout the EC is so diverse as to make the strict interpretation of the more detailed UNESCO definitions impossible for certain of the libraries activities we attempted to measure. Therefore, the results of this study provide an insight into the extent of library activities throughout the EC rather than an exact measure of the importance and utility of libraries to the economy of the community. WHERE WE HAVE QUOTED FIGURES THESE MUST BE INTERPRETED WITH SOME CAUTION. In this respect, we sought information for five years, 1980 to 1985 inclusive, describing the scale of each library sector, and the costs associated with each.

1.1.2 Types of Data

There were two types of data we were seeking in the survey: "Activity" or data concerning the physical aspects of the library service, such as the number of books, staff, users, etcetera; and "Financial" which were the descriptive measures of the scale of the libraries in the national economies covered in our study. The activity data were in most cases much more amenable than the financial information, which has caused us to undertake more estimates for the latter. Where we have reported expenditures, these are all shown in ECU equivalents and at constant 1985 prices. A major problem which we have identified is the lack of standard financial forms of account which can be operated throughout the European Community (EC). Therefore, the practicability of gaining precise assessments of expenditure on libraries for the EC is limited.

1.2 Financial Statistics

In the early 1980's revenue (current) plus capital expenditure on library activities approximated to 4.7 Billion ECUs per annum (at 1985 prices). This was equivalent to 14.8 ecu per head of population.

1.2.1 Revenue Expenditure

Library revenue spending, in real terms, remained relatively

constant during the period under review: (13.80 ecu to 13.97 ecu per capita). There were fluctuations in overall government public expenditure programmes, and such movements will have served to emphasize the small, but real, drop in the proportion of national resources input into libraries: (From 0.41% to 0.39% of total Government Public Expenditure, after deduction of their defence programmes). A discernible increase in the spending on National libraries was evident, and a decrease in school library spending traced a decline in pupil numbers during this time. Taking all libraries sectors in aggregate, it is apparent that the direct cost of staff in libraries accounts for just over 50% of the overall revenue budget, whilst support staff overheads account for a further 6%. Stock Acquisitions comprise the second biggest expenditure heading in the analysis of the revenue budgets for libraries. From the figures submitted it seems as though the average per annum revenue expenditure on stock acquisitions in the EC was approximately 874 Million ECU. It is interesting to note that whereas the proportion of Public Libraries expenditure on acquisitions was roughly 15%, in institutions of Higher Education it was closer to 31% reflecting the higher cost of technical and current literature which are demanded by academic bodies.

ANNUAL AVERAGE REVENUE SPENDING ON LIBRARIES (1981:1985)

| LIBRARY SECTOR: | REVENUE EXPENDITURE AT 1985 PRICES (Millions ECU): | % OF TOTAL: |
|-------------------------|--|---------------|
| National | 207.7 | 4.6% |
| Other Major Non-Special | 105.5 | 2.4% |
| Public (Popular) | 2,509.8 | 56.4% |
| Higher Education | 523.0 | 11.8% |
| School | 936.5 | 21.1% |
| Special | 165.4 | 3.7% |
| ALL SECTORS | 4,447.9 | 100.0% |

1.2.2 Capital Expenditure

The cost of investment, in terms of capital payments on libraries infrastructure has been even more difficult to establish. We estimate that the average annual capital expenditure over the EC was at least 285 Million ECU. Spending on Public Libraries accounted for 87% of this amount, and the investment in School Libraries is excluded from this estimate.

ANNUAL AVERAGE CAPITAL SPENDING ON LIBRARIES (1981:1985)

| LIBRARY SECTOR: | CAPITAL EXPENDITURE AT 1985 PRICES (Millions ECU): | % OF TOTAL: |
|-------------------------|---|----------------|
| National | 12.6 | 4.4% |
| Other Major Non-Special | 11.2 | 3.9% |
| Public (Popular) | 247.0 | 86.6% |
| Higher Education | 5.4 | 1.9% |
| School | - | - |
| Special | 8.9 | 3.2% |
| ALL SECTORS | 285.1 | 100.0% |

1.2.3 Sources of Income

The form of funding has been particularly difficult to trace and the distribution is influenced by the fact that not all libraries fall within the scope of the Public Sector. Between 87% and 100% of the total Public Libraries budgets were funded from the public purse. The split of this funding between the National Exchequer and Local tax sources was not uniform. However, fees and charges accounted for approximately 5% of Public Libraries' revenue, and local administrations appear to directly provide 43% of income towards revenue expenditure.

ANNUAL AVERAGE SOURCES OF REVENUE FUNDING (1981:1985)

MILLIONS OF ECU AT 1985 CONSTANT PRICES

| LIBRARY SECTOR: | NATIONAL GOVERNMENT | LOCAL GOVERNMENT | FEES & CHARGES | OTHER SOURCES |
|-------------------------|------------------------|---------------------|-------------------|------------------|
| National | 135.8 | - | 23.1 | 48.9 |
| Other Major Non-Special | - | - | - | 105.5 |
| Public (Popular) | 1,181.7 | 1,083.3 | 120.1 | 124.6 |
| Higher Education | 480.8 | 2.8 | 12.1 | 27.2 |
| School | 476.6 | 459.5 | - | 0.5 |
| Special | - | - | - | 165.4 |
| ALL SECTORS | 2,274.9 | 1,545.6 | 155.3 | 472.1 |
| 2,509.7 = 100% | 51.1% | 34.8% | 3.5% | 10.6% |

1.3 Activity Statistics

There are at least 75,000 "Static library Service Points" in the EC. About half of these are Public Libraries and more than one third are School Libraries. The estimated number of books held in all sectors of libraries is approximately 1.2 billion (i.e. thousands of millions). EC libraries employ the full-time equivalent (FTE) of about 188,000 staff, with a further 56,000 equivalent staff in support. The average school library is thought to possess 9,200 books against a mean figure of 76,000 for Libraries serving institutions of Higher Education, and 13,100 for branches of Public Libraries.

1.3.1 Availability of Library Services

Overall, there were about 3.8 library books per man, woman and child resident in the EC during the period examined. Whereas, a high number of books per head of population in any particular country demonstrates a greater degree of availability to the population at large, it follows that a low number of loans per registered borrower does not necessarily show a poor level of use of the library facilities. Thus in general, in the North of Europe there is a greater level of provision, allowing for larger choice, but in the South of the EC, there is a lower level of provision, and a higher usage as measured in loans per book held in stock. However, a significant measure of the availability of library services to the population at large is demonstrated in the average population catchment size of Public Library service points, where it is evident that there is a clear North/South difference: The United Kingdom, Denmark, West Germany and Belgium have catchment populations of less than the EC average of 8,500 persons per Public Library service point. In all sectors the volume of bookstock was increasing steadily. During the period 1981 to 1985 it is estimated that the number of books in Public Libraries rose by 8.6% (from 467 million to 509 million), an annual growth rate of 2.1%. On a per capita basis this meant an increase in public library bookstock from 1.47 books per head of population to 1.58.

1.3.2 Library Usage

Approximately 23% of the total population are regular library

users or registered borrowers. It is clear that Denmark stands out in that its libraries maintain 62% of the national population as library clients. Since 1983, at least, there does appear to have been an increase in the number of users of EC library facilities (3.0% p.a. National; 5.0% p.a. Other Major; 1.0% p.a. Public; 11.5% p.a. Higher Education) although, with a decline in the school age population this was not the case in school libraries. 95% of all loan transactions are made from Public Libraries.

1.3.3 Development of Library Services

There is likely to be a very small growth in the aggregate population of the EC over the next 25 years. Measured from 1990, by which time the decline in school age population will have halted, the growth of the EC will be only just over 1% during the two decades. However, the flow of population change is likely to show a general decline in some of the more "advanced Library States", whereas those that at present show lesser library resource infrastructures will be those where population growth will be most. Despite the growth in the national economies of the EC during the early 1980's, there has been no evidence to suggest a corresponding increase in libraries investment. Therefore, the "development gap" between the more advanced library states and the less well developed will widen, unless there is a change in the approach to planning and investing in library resources in the coming years. The challenge of the future development of library services within the EC will be to extend the availability bookstocks to those areas where the access to service points is particularly difficult. In this respect, 58% of the population of the EC at present reside in areas where the catchment size of Public Library service points exceeds the EC average of 8,500 persons. However, the responsibility for funding library facilities are often divided between different Central Government Departments or responsible Ministries and local administrations (local municipal organisations, and educational establishments). There appears to be ample scope for better co-operation on library policies at Member State level, and a positive step towards achieving this will be to enhance the systems for collecting and exchanging data on library services for the mutual benefit of all responsible for the efficient management of libraries within the EC.

1.4 Statistical Review

We have encountered problems when collecting data for this study,

and these problems will need to be addressed if the development of libraries in the EC is to be monitored in future:

1. It is not common practice to include financial breakdowns in the same surveys used nationally to collect activity based data about libraries, consequently the figures drawn from different sources are inconsistent. In many instances the interest in maintaining the statistical frameworks describing libraries activities lies with librarians alone, and so a wider recognition of their problems in collecting the data and the assistance of other professions in their administrations would considerably strengthen the consistent survey coverage of the libraries services.

2. There are no commonly held standards defining the major headings under which financial information about libraries should be kept. In the accountancy profession these are known as "Standard Forms of Account". In this respect, alone serious work needs to be undertaken, if reliable international comparisons of financial inputs to libraries are to be made.

3. Responsibility for libraries often crosses several government Departments/Ministries, each with their own priorities for identifying the costs of such activities. Indeed, the mixed funding pattern for Public Libraries, which constitute the largest sector of libraries activities appears to suffer from a funding dichotomy between the aspirations of Central and Local forms of administration.

1.4.1 Standardisation

Not all the information which UNESCO seeks to collect is useful for policy formulation at national level in a European context, and the quality of the data are such that they can only be used with extreme caution. This can only be improved by better co-ordination and co-operation at international level between government departments responsible for libraries, agencies responsible for collecting and publishing the statistics and library managers. The EC might consider how to sponsor improved co-ordination and co-operation to benefit not only Member States but UNESCO which would ultimately receive better quality data for the countries concerned. One alternative approach would be for the EC to act as a collecting agent for UNESCO, passing on validated data on its behalf, for the mutual benefit of all concerned. A forum to agree a form for EC libraries statistics would be a useful start, and urgent consideration should be given by the International Organisation for Standardisation (ISO) to the integration of financial and activity based statistics.

1.4.2 Suggested Action

In summary, we see the appropriate course of action as:-

1. Promote recognition by Member States of the need to consider the practicability of assembling financial information consistent with their activity statistics and within the same surveys to ensure such consistency;

2. Define which of those sectors, described as libraries activities within the UNESCO definitions, which require most emphasis for policy evaluation: School libraries maybe better considered as part of dedicated education programmes and Specialised libraries are so diverse in their scope and services as to remain out of effective information policy influence. With a clearer understanding of the objectives of any policy appraisal for developing EC libraries statistics, it will be easier to specify which areas of libraries activities need their statistical reporting frameworks developing as a priority. This will facilitate a phased, but efficient development of definitions where not all sectors require the same degree of emphasis;

3. Initiate a forum for the wider development of European statistics on libraries which would act as the agent for the provision of such information to other organisations interested in library activities;

4. Compile a central register of statistical sources to supplement those identified during the course of this study, which can be used by a review group representing constituent national Ministerial interests, in developing appropriate EC "Activity" and "Financial" forms of account.

5. Continue to monitor the structure of funding of libraries throughout the EC, as well as taking a note of the volume of such funding. In this respect, we have noted the mixed channels of funding through different National Ministries, and local Municipal administrations. We believe that developing a consistent statistical reporting process is the only means of providing those individuals and organisations diversely involved with the information which can allow them to develop their services in an efficient and co-ordinated manner.

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FOUR DECADES OF INTERNATIONAL LIBRARY STATISTICS

1. It all began in 1951 with the despatch to the then sixty Member States of Unesco of a very simple questionnaire of just two pages requesting, in one single table for five different types of libraries, some basic statistical information on their number, collections, circulation activities, visitors and registered borrowers.
2. Looking back on almost forty years of International library statistics, it is interesting to note that as far as the different types of libraries are concerned, i.e. national, public, university, school and specialized libraries, the categorization used in the 1952 survey has not changed at all. It was maintained in the 1970 Recommendation and is still applied in the Unesco questionnaires. From this it appears that despite various developments and changes in the functions and the functioning of libraries, there is general agreement that this by now almost classical breakdown is a valid one and is applied by many countries in their library statistics.
3. The situation is somewhat different when it comes to the various kinds of data collected on each of these five types of libraries, at least as far as Unesco's data collection is concerned. With regard to the number of libraries, for instance, it was not until 1966 that a differentiation was introduced between administrative units and service points. The same holds for statistics on collections or holdings where for fifteen years only the number of volumes was requested, regardless of the type of material, and it was only from 1966 on that a distinction was made between printed material and manuscripts. In that same year, the measurement unit was also changed from the number of volumes to the length of shelving. It should also be noted that until 1966 statistics on accessions in terms of volumes added to the book stock were surveyed only once; this type of data was left out of International library questionnaires for over ten years. Exactly the opposite occurred with statistics on circulation which referred in the beginning to the number of volumes lent (a) for home use, (b) for use in the library, and (c) as inter-library loans. While the collection of statistics on the latter was discontinued after the first two surveys, the other two questions on circulation were deleted from the questionnaire altogether in 1966.

The questions that were maintained in all the surveys until 1970 without any change were those on the number of periodical titles, registered borrowers and visitors to libraries or on-the-premises readers as they were later called. With regard to statistical data on the financial aspects of libraries, it can be noted that a detailed question on current expenditure was first introduced in 1954 while statistics on capital expenditure were collected for the first time in the 1962 questionnaire. An item on current income appeared in only two surveys (1954 and 1956) and was never reconsidered again. Finally, statistical data on personnel were included for the first time in the 1962 questionnaire.

In conclusion, during the two decades prior to the adoption of the Recommendation in 1970, the Unesco library questionnaires were relatively simple as regards both scope and degree of detail of the statistics requested. The number of questions or items surveyed, five in the beginning, never exceeded nine and could be contained in a one-page table. The very fact, however, that all the statistics requested on the different types of libraries were to be consolidated into a single table suggested that the international surveys were carried out under the assumption that in each country there was one central agency, a kind of national library service managing and responsible for all libraries, regardless of whether they were school, public or specialized ones. This would also explain why, in all questionnaires prior to 1970, there were two questions concerning the number of libraries, one referring to libraries existing and the second to libraries reporting. Such a distinction can only be made if there is a central body that firstly keeps records of all libraries and is thus in a position to report on the number of libraries which exist, and secondly carries out the national library surveys, in order to be able to give the number of libraries reporting. Unfortunately this ideal situation seems to exist in very few countries and had certain consequences for the international data collection programme.

4. The year 1970, about midway between the despatch of the first library questionnaire and the present, was marked by the adoption by the Unesco General Conference of the Recommendation concerning the international standardization of library statistics. The main objective of this international instrument was to guide national authorities responsible for the collection and communication of library statistics by means of certain standards (definitions, classifications, presentation, etc.) which, if properly applied, would help improve the international comparability of these statistics;

What changes were brought about by this Recommendation? As a matter of fact, relatively few, especially if compared with the last two surveys prior to 1970. This should not really come as a surprise if one recalls that the Recommendation was the outcome of many years of discussion, consultations, meetings, etc., the results of which were already reflected, and thus tested, in the 1966 and 1968 questionnaires. The only real alterations were the introduction of a question on photographic and other copies and the re-introduction of a chapter on circulation, i.e. loans to users and inter-library lending. The rest consisted of minor modifications, for instance, providing for the reporting of statistics on microforms in the chapter on collections and additions, or of full-time and part-time staff separately in the question concerning library employees.

The Recommendation, therefore, should not be considered as something entirely new but rather the logical consequence of the experience gained and results obtained during twenty years of international data collection activities in this particular field. By adopting such an International Instrument, the Unesco Member States undertook to follow certain principles that would help improve both the quantity and quality of national library statistics and thus increase their international comparability.

5. It was clear, however, from the very beginning that the implementation of this Recommendation would not be, and is still not, an easy task for most countries for various reasons, some of which are interlinked :
 - i) hardly any country possesses a central agency responsible for library statistics;
 - ii) very few countries have a statistical system equipped to undertake regular, systematic and comprehensive data collection in the library field;
 - iii) should library surveys be undertaken by one country or another, it often happens that either their periodicity does not coincide with that of international data collection, or that the national library census concentrates on one type of library only, or that important types of libraries such as specialized or school libraries are left out completely;
 - iv) finally, it appears that where library statistics are kept at the national level, their scope and content often differ from those of the 1970 Recommendation and subsequently from those of the Unesco questionnaires.

It was hoped that with the gradual implementation of the provisions contained in the Recommendation, some or even all of these obstacles would eventually be overcome and that as a consequence the quality and quantity of the library statistics reported by individual countries would improve, thus allowing some meaningful international comparison in this field.

6. However, international data collection following the adoption of the Recommendation in 1970 unfortunately did not come up to these expectations. Of the countries participating in the first survey based on this new international instrument, almost two-thirds returned the questionnaire, while in the following two surveys the overall response rate dropped from 56 per cent in 1975 to 48 per cent in 1978, showing a steady decrease in the number of replies. It should also be pointed out that of the 100-120 countries which returned replies in these three surveys, almost one-fifth stated that no data were available and another one-fifth provided data for only one type library. Not more than 40-45 per cent of the questionnaires returned in a given survey could be considered more or less complete as far as the different categories of libraries were concerned. Whether they were complete with regard to the different types of statistics to be reported on each of the five categories of libraries is another question. Furthermore, the countries replying to the different surveys often changed, making it almost impossible to study trends and developments in specific library activities, at least for a representative number of cases.

7. Less than a year after the adoption of the Recommendation and before the first survey based on it was carried out, a meeting took place in Prague with the participation of, among others, representatives of IFLA and ISO who already discussed an extension of the data collection programme. In so doing, they followed up a proposal made by a Special Committee of Governmental Experts that had met in the spring of 1970 to finalize the draft of the Recommendation and which, in its report, took the view that "the draft Recommendation covers only part of the total field of library activities" and that "other very important areas cannot yet be analyzed statistically because insufficient study has so far been carried out in methods of counting and in deriving the necessary definitions". The Special Committee recommended, therefore, "that Unesco, in consultation with other interested international organizations, especially IFLA, ISO and IFD, urgently sponsor further studies in these and other related areas".
8. The question of extending and/or updating the 1970 Recommendation remained one of the main discussion topics for several years, and finally, for the 1978 survey, it was decided to introduce certain changes to the questionnaires used in 1972 and 1975, the most important being a question on audio-visual materials in the paragraphs on collections and annual additions, modification of the paragraph on loan transactions to combine the question of loans to users and the questions on inter-library lending within the country and to count loan transactions by the number of requests received and satisfied (instead of the number of volumes), and the deletion of the question on capital expenditure which had a very poor response rate in the two previous surveys.

From the replies received to the 1978 and subsequent surveys, it appears that these modifications were well received and helped improve the comprehensiveness and clarity of the questionnaires.

9. However, there was still the question of a relatively low and steadily-dropping overall response rate and also the fact that almost no country, even if it returned a questionnaire, was in a position to provide statistics on all types of libraries. There were no self-evident reasons, especially for the first phenomenon, i.e. the decreasing response rate, since as far as the Unesco Office of Statistics was concerned, nothing had changed between the first survey in 1972 and the third one in 1978. The questionnaires were the same, the amount of data requested constant or even reduced, and the agencies to which the questionnaires were sent remained the same throughout the period under review, namely the National Commissions for Unesco. It could only be deduced that the questionnaires channelled through these National Commissions, especially in regions other than the European one, all too often did not reach those persons who could provide the data required or that these persons, faced with a request for an increasing amount of information, suffered from "statistical questionnaire fatigue". The fact that the drop in response occurred only in the developing regions suggested that it was somehow related to the specific situation in certain countries where the National Commission for Unesco were often, or still are, under-staffed or underwent frequent changes in personnel, resulting in a certain inconsistency in the collection and reporting of data, i.e. in a lack of proper follow-up.

In order to try to remedy this situation, it was in 1979 that the possibility was studied of splitting up the questionnaire into two or three separate ones. It was thought that such a measure would make the handling of the questionnaire easier for National Commissions with regard to the identification of the appropriate statistical source and that the positive effect of such a modification could possibly be increased if the timing of the surveys was changed and only one of these separate questionnaires despatched each year in turn, instead of all together every three years. These proposals were first applied in the 1981/82 survey which consequently referred to national and public libraries only, while the following two surveys concentrated respectively on university and school libraries (1982/83) and specialized libraries (1984). Since then there has been a second round of surveys.

10. This new practice of sending out three separate questionnaires in turn initially brought about a clear improvement in the response rate of up to 20 per cent, depending on the type of library and the region. The results could have been even better if in some countries more consistency in the reporting of data were achieved. As an example, about one-third of the countries that completed the section on national and school libraries in the 1978 questionnaire did not react at all to the 1981/82 survey on the same types of libraries, most probably because the questionnaire was not sent to the source that provided statistics previously. Nevertheless there was an increase in the overall response rate for all five categories.

11. Unfortunately the promising results of the first round of surveys did not continue for the second one. As in the years between 1972 and 1978 it has not been possible to stabilize the number of replies at the highest level reached, again for reasons that escape rationalization. Among certain possible solutions to remedy this somewhat difficult situation, there was, for instance, the suggestion that a simplified questionnaire could be sent to those countries which have difficulty in replying to or are discouraged by the regular and rather detailed Unesco questionnaire. There was also the idea of model questionnaires, one institutional and one national, that could be introduced possibly by the national IFLA committee in those countries where a regular and systematic collection of library statistics has not yet been started. Another idea was that of setting up a network of clearing-houses in various regions whose function would be to serve as resource centres on the mechanics and modalities of collecting and analysing library statistics in different countries of the respective regions.

Any idea, any initiative such as the one taken by the EC with the LIB-1/ECON project, that is likely to give a boost to international library statistics, is most welcome.

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INTERNATIONAL LIBRARY STATISTICS AND STANDARDIZATION

Activities of ISO to standardize international library statistics are based on the activities of other organizations, using the results of their considerations and cooperating with them. In this way ISO has tried to refer to and to include worldwide trends in library statistics as far as possible and to avoid competing with other international organizations working in this field. There are principally two other international organizations involved in international library statistics, UNESCO and IFLA.

UNESCO started at the beginning of the 60s to develop a recommendation on international library statistics in its general framework of collecting statistical data based on article VII of UNESCO's constitution which requests any member states to report statistics relating to educational scientific and cultural life to UNESCO. The principles were developed in 1964 and the formal Recommendation has been adopted by the general conference in 1970(1). This Recommendation formed the basis for all further considerations and proposals for international library statistics in all other international organizations. The text of the first edition of the international standard ISO 2789 "International library statistics" from 1974-02-15 is identical to that of the Recommendation.

This was possible because UNESCO based its own work on cooperation with ISO and IFLA. A joint working group of IFLA and ISO supported by UNESCO held conferences in The Hague in 1966 and Paris in 1967. The conference of governmental experts convened by UNESCO in May 1970 referred to the progress report of 1968 as the outcome of the two previous conferences and developed the draft for the UNESCO Recommendation and therefore the ISO standard too. The development of the standard on international library statistics has, from the very beginning, been an example of the excellent cooperation of all the international organizations involved in this field.

In the course of the 70s the growing importance of different library materials and aspects not covered in the UNESCO Recommendation became obvious, so discussion began about making changes to the Recommendation. But in principle the Recommendation and the questionnaire distributed by UNESCO have been stable since that time.

(1) UNESCO Recommendation concerning the international standardization of library statistics adopted by the General Conference at its sixteenth session Paris, 13 November 1970.

As already mentioned, IFLA was also involved almost from the very beginning. Once the UNESCO Recommendation and the ISO standard were adopted, IFLA concentrated its efforts on supporting the data collection of UNESCO's statistics within IFLA's member organizations and libraries. The three surveys carried out by UNESCO from 1972 - 1979 showed a considerable decline in the overall response rates both in number of replies and numbers of cells completed. Discussion between UNESCO and IFLA led to a different approach for the data collection. The questionnaire was split into three separate forms (one on national, other major non specialized and public libraries, one on libraries of institutions of higher education and school libraries, and a third one on specialized libraries). Further, the questionnaires were sent out at different intervals. The consequences and details of these developments are reported elsewhere in this workshop (2). I would, however, like to refer to a further activity of IFLA in this field in these years. It was thought that countries with less highly developed library and administrative systems were unable to fill the whole sophisticated UNESCO questionnaire and therefore failed to report at all. IFLA's section on library statistics therefore developed in cooperation with the UNESCO Office on Statistics a short questionnaire mainly for third world countries to get at least some overall figures about their development in librarianship. In this and other ways IFLA contributed to and supported the development and use of international statistics on libraries.

The task of ISO in this field could only be to establish and update an international standard by means of its member countries. With some exceptions it is mainly not the task of ISO to put its standards into effect for example by collecting data for international library statistics. This rôle belongs to UNESCO supported by IFLA. So ISO participated as already mentioned from the very beginning in the development of the drafts which finally became ISO 2789. It participated in all further discussion about updating the standard. In 1980 there was a special meeting in Strasbourg on audiovisual material in library statistics. The work to revise the first edition of ISO 2789 was started at the beginning of the 80s. The draft for the revised standard DIS 2789 was resolved at the plenary meeting of ISO TC 46 in 1987 in Moscow and is now in the final voting process of all ISO members. It is expected that it will be published as a standard in the course of 1988.

The new ISO standard is still based on the UNESCO Recommendation. Sequence and principles of the reporting of statistical data are very similar to the UNESCO Recommendation. It is the purpose of the revised standard to update the previous edition especially regarding technical development, to adapt the terminology to the definitions which came up in the meantime especially to the Vocabulary for Information and Documentation of ISO and the different ISDBs of IFLA and to add some further counting rules based on experience with the first standard and in national standardization bodies. The term "document" has been used as principal unit for the definition of all types of documents according to the ISO vocabulary.

(2) see Hochgesand, K. Four decades of international library statistics.

In addition there have been added new types of documents or documents which have become in the meantime important enough to be included in national and international statistics. ISO has been very cautious and included only "audiovisual documents", "cartographic documents", "graphic documents" and "electronic documents" as separate counting units additional to the traditional types of documents. Further, parallel to the addition section there has been added a withdrawal section. However, there has been much discussion on whether electronic database services in libraries should be added. Finally, at the very last moment in the last meeting of the working group in Moscow, it was decided to wait for further developments in this area and to leave it to the next revision. Other changes referred to minor corrections and additions in the reporting section. The presentation of this standard has been changed by a strict separation of definitions and counting regulations.

ISO is a non-governmental organization. Therefore the relationship of ISO to its member bodies works through cooperation and partnership without any governmental authority. The member bodies decide which ISO standard in which form or extent they want to adopt for national use. In recent years ISO has introduced a regulation which allows the word by word conversion of ISO standards into a national standard. In the area of ISO/TC 46 this regulation is very seldom used. The member bodies orientate their national standards to ISO standards but refer first to national requests and traditions. To some extent library statistics have been an exception, because all three organizations involved in the field have cooperated to get one standard working. Quite a lot of ISO member bodies have based their national standards on the basis of the UNESCO Recommendation and ISO 2789, though all have made national changes and adjustments.

The LIB-1/ECON Study Report demonstrates very clearly the problem of quality and availability of statistical data. Despite its being much easier to find statistical data for the European Community than it is for UNESCO to collect data for the whole world, the report emphasises the lack of quality and data. The data compilation of the report contains some quite improbable figures even though it aimed to collect all available library statistics in Europe and to complete these data by a questionnaire survey of its own. This raises the question of the quality of international library statistics and the function of the standard.

The quality of international statistics depends entirely on the quality and comparability of national data. The discussions about ISO 2789 and UNESCO statistics demonstrates that not even all countries with well developed library systems have got well developed national library statistics. In the meantime, influenced by these discussions, the situation has changed considerably in most of these countries. For example, the national library statistics of the Federal Republic of Germany have been especially developed on this basis and the different types of library statistics for different types of libraries collected by different organizations have been unified. Now there is only one set of national library statistics. But even then the problem remains that the various national library statistics on which the international statistics are based use different data collection methods. Thus not even the national data are really valid because of the different data collection traditions, habits and requirements of the libraries themselves.

National library statistics can only be as good as those of any participating library. In countries with less developed library systems and no national library statistics at all, the data for UNESCO statistics have to be estimated which might in such cases be more valid than counting. The main problem with library statistics is not really the quality of the standard which is quite acceptable in most of the member countries of the European Community but the organization of data collection on the national level. In the FRG the results of the national statistics are used for some purposes but there are quite a lot of people who refuse to refer to them. In the meantime, though, the quality of the organizational structure for data collection has been much improved, still a lot of data supplied by libraries are not comparable. So the three international organizations involved and the ISO standard can only set up the general framework for an international agreement which naturally is essential as minimal base of international library statistics. However, to get really useful data for international comparison and for the development of libraries as part of cultural and educational life in the world, excellent organization at national level is necessary as is a willingness on the part of each participating library to accept the international regulations even if this means changing its own traditional ones. If and where it is possible at all it will still take a long time. Despite this, the goal is attainable and the prize worth striving for.

Finally I want to comment on the areas and limits of standardization in library statistics.

1. Definitions

Definitions are the principal area of a standard. But international standardization even of definitions in the field of library statistics is difficult because of the different use of terms in different fields and in different countries. When the Report (Ramsdale, op. cit.), for example, complains that the definition of "library" in the ISO standard is not precise enough and not sufficient it shows the problem in both directions mentioned. Any more precise definition would impair different national understanding within the countries of the European Community and the different use in other fields. So the definition only covers the minimal requests for international use in library statistics. Despite long discussions it has not been possible to find a better one. International cooperation means being modest.

2. Counting Units/Library Activities

A standard can define counting units and the different areas of library activities to be included in the statistics. After some practice in national and international library statistics and continuous completion and improvement of definitions to make the interpretation of the regulations of a standard as common as possible, these two areas of a standard are those which function best. But it doesn't solve the problem of different counting habits in different countries and libraries.

3. Financial data

Getting comparable data is mainly not a problem of standard regulations. The standard can only request common and comparable figures. However because most of the libraries in the European Community are more or less governmental libraries they have to conform to national and local budgeting habits and regulations.

The different figures requested in the Report are included in different parts of the public budgets. For example the expenses for premises may be within the budget of a library, but more often they are hidden in other budgets for example of larger organizations to which the library belongs such as universities, municipalities and so on. In this case separate figures for libraries will not be available whatever the standard requests. Libraries will not be able to change the budget habits of governments and municipalities for statistical purposes. Therefore reliable financial data will be difficult to get even if libraries are willing to do their best.

4. Counting Procedures

A standard can define counting units and areas of counting but it is extremely difficult to standardize counting procedures because they depend on the structure and organization of the institutions. Who is counting and where the figures are counted within the library is important. Therefore a standard can only give very limited support for the standardization of counting procedures. On the other hand quality and comparability of statistical data are extremely reliant on counting procedures being at least similar.

5. Organization of Statistics

It is completely impossible to create a commonly standardized organization of statistics and data collection in all countries and libraries of the European Community. The structure of local and national bodies involved in and responsible for statistics and for the collection and cumulation of statistical data are too different. They depend entirely on the general organization of a country and even on the constitution. In some countries it could be possible to subject library statistics to national legislation whereas in others, for example in the Federal Republic of Germany, most big libraries belong to the state governments and governmental regulations therefore are limited to the states. But even if statistical regulations for libraries were legally enforceable, comparable and reliable data are not guaranteed because the law on statistics cannot change the administrative structure of the whole country. So this dependence and variety will always influence statistics. Nevertheless, it should at least be possible within the European Community to have national bodies with comparable responsibilities in library statistics, to organize and collect the data at the national level. In this case the national statistics bureau are not enough because organization is needed in the professional area of librarianship. Even then it will be difficult to make libraries count the same data in the same way.

Finally I would like to make a general remark. Any standard, especially a standard on statistics which wants to be successful has to be as close to reality as possible. But because data collection and counting habits and traditions in different countries and libraries are very different and need a long process to become more common within the European Community, the requests for European library statistics should not be too ambitious. A smaller quantity of highly reliable data is much more useful for European library planning and comparison than a huge amount of data which will never be worth even the cost of collection. Few is better.

ROY WALKER
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THE WORK OF THE STATISTICAL OFFICE OF THE EUROPEAN COMMUNITIES

The Statistical Office, also known as EUROSTAT, is a Directorate-General of the Commission of the European Communities, like DG XIII or any other, except that for external purposes it does not bear a number in its title. Its task is to provide the Commission and the other Directorates General in the first place, the other Community institutions in the second place and the Member States' governments, the social partners and the public at large in the third place, with statistics relevant to Community policies. It is responsible to one of the Commissioners, at present Mr Peter Schmidhuber.

The Office is at present organised in five directorates under a Director General, Monsieur Yves Franchet, the directorates being :

- A - Processing and dissemination of statistical information
- B - General economic statistics
- C - External trade, ACP and non-member countries, and transport statistics
- D - Energy and industrial statistics
- E - Demographic and social statistics / Agricultural statistics.

The Office has a total complement of about 300 staff, including approximately 100 at professional level. These numbers have risen only very slightly over the years in spite of an increased work load due to new projects and to the enlargement of the Community. In fact at the senior levels there has been a reduction in personnel; until about 5 years ago there was a directorate for agricultural statistics separate from demographic and social statistics. It can therefore be said that the human resources of the office are fairly stretched.

The Office works to a 3-year programme which describes the various projects. At the time of writing the 1985-87 programme has been prolonged whilst the 1988-90 programme is in course of preparation. A programme, taking account of continuing projects, new projects and occasionally downgrading in priority or dropping existing projects, is prepared under the direction of the Director General and approved by the Commission after consultation with the other Directorates General and the DGINS. The latter acronym refers to the Conference of the Directors general of the National Statistical Offices of the Member States, which meets twice yearly and is directly concerned with the programme because most of the data used by EUROSTAT are provided by the national statistical services.

At present there are about 150 projects of various magnitudes. Work on each project or group of allied projects is aided by a Working Party composed of nominated representatives of the Member States, mostly official statisticians, and private experts where appropriate. The first task on any new project is to see what data already exist in the Member States and what definitions and classifications are in use, there being no point in compiling statistics at Community level unless the national figures are at least reasonably comparable in concept. The next step is to secure agreement on harmonised definitions and classifications. "Harmonised" does not necessarily mean that corresponding figures for different countries are exactly comparable but are as close as can be negotiated. On continuing projects the Working Parties still play a useful role; new requirements are continually arising in most fields.

EUROSTAT collects directly very few data. As mentioned above, the official statistical services in the Member States supply most of the data, whether the original collection has been made directly by them or by private organisations. The same national offices are responsible for adjusting, where necessary, data from national to harmonised Community concepts. The transmission of figures to EUROSTAT is by magnetic tape in the case of large volumes of data, such as external trade, the labour force survey, the farm structure survey, etc. Small volume data are sent on paper.

EUROSTAT statistics are disseminated by direct access to computer data banks, by microfiches and by about 100 publications of periodicities ranging from monthly upwards. Two annual publications are of general interest : "Basic statistics of the Community", which gives the latest figures in many fields and "EUROSTAT Review", which provides selected time series over the past 10 years.

The Office maintains close links with other international statistical organisations, such as the UN Statistical Office, OECD, UNESCO, ILO, FAO, etc., where the problems of standardisation of concepts are fundamentally similar although sometimes more difficult because of the number of countries involved.

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HARMONIZATION OF REPORTED YEARLY STATISTICAL DATA FROM NORDIC RESEARCH LIBRARIES

As it has been mentioned in the keynote address, the Nordic countries - i.e. Denmark, Finland, Iceland, Norway and Sweden - have been working together in an effort of harmonizing the reported yearly statistical data from their libraries.

Regarding the research libraries, the work has been carried out in a small working group with one representative from each of the national agencies responsible for research library statistics. The work was initiated and financed by the joint Nordic Council for Scientific Information and Research Libraries, NORDINFO. As secretary to this group, I shall be happy to give you some details on what we have actually achieved.

I find it very likely that this amounts in fact to the highest attainable level of harmonizing library statistics from individual countries. This applies to the exactness of the individual data, and to some extent also to the choice of data to be reported on a multi-national scale. It is our sincere hope that in the future we can be certain that a single figure - number of copies of original documents sent to foreign countries in lieu of original documents, say - is the result of an understanding and counting in exactly the same way in every library.

This does not in and by itself give more work to burdened librarians. But it is true that in some cases harmonization makes new counting procedures (and habits) necessary. Therefore, some extra efforts as regards education and training are called for. 1988 is the first year in the new era, so we will not know before Spring 1989 how great the problems will be.

The data will in all probability be published (together with the corresponding data from the public libraries) by "Nordisk Statistisk Sekretariat" in Copenhagen. It is expected that in this yearly publication the sums of the figures for each library category in each country will be given, as in the present report on library economics of the E.C. Whether the data will be obtainable through a data base has not yet been discussed. How far NORDINFO itself will be involved in collecting, editing and commenting the data from the five countries is also a matter for future decision.

There are two presuppositions, both of which are fulfilled by the Nordic countries, which I believe to be necessary for these goals to be reached. First, there must be a national agency responsible for collecting and presenting the statistical data. Secondly, the country and its libraries must have some experience in collecting data on the level given by the UNESCO Recommendation.

The initial step in the Nordic accomplishment was to establish a survey for each of the countries with a description of the overall research library organisation (e.g. of the relationship between university libraries, faculty libraries and university institution libraries) and its relationship to the educational structure of the country in question, furthermore of the number of libraries actually reporting statistical data as compared to the total number of libraries in each category, and finally a comparative survey of which data that were collected and published in each country. This was done by a statistician from Danmarks Statistik, and the report, which forms part of a larger report on museum and library statistics, has been published*).

With this report, the problem areas and areas for further work to a large extent had been defined. These can be summarised as follows :

- 1) The type and number of libraries to be included in each library category, so that the population (or samples) are comparable.
- 2) The categorisation of the staff, since the educational backgrounds differ from country to country.
- 3) Consensus on the categories of statistical data to be included in a multi-national statistical yearbook.
- 4) Consensus on the exact definition of these categories.

The second stage, then, was to resolve these problems. This was done by the working group mentioned above. An outline of the decisions reached are given in the following.

Type and number of libraries

The two main problems were whether there should be a lower size limit for a library to be included, and whether it would be possible to obtain data from the many small libraries of university institutions.

The first question reflects differences in library structure : whereas there was agreement that a lower limit regarding the number of persons employed was necessary, it was impossible to agree on whether that number should be one full-time-equivalent or higher. The compromise was that the sample size should be decided at the national level, but that the number of libraries in the whole population also should be given.

For the institution libraries only a very limited set of data are asked for, viz. the holdings in linear metres, number of periodicals, annual additions in volumes, staff, and expenditure. With such a reduced data set, the libraries in question hopefully will take the trouble to answer.

* Nordisk biblioteks-og museumsstatistik. Nordisk statistisk sekretariat. Tekniske rapporter 42. København 1987. 230 p. With English Summary. Obtainable from Nordisk Statistisk Sekretariat, Postboks 2550, DK-2100 Copenhagen.

Categories of staff

The staff categorisation was solved by defining that e.g. the following types of staff for statistical purposes were to be held equal :

- Forskningsbibliotekarere (Denmark)
- Bibliotekarier och dokumentalister (Sweden)
- Universitetsutdanning av lavere/høyere grad (Norway)
- Kirjastonhoitajat ja Informaatikoot. Muut korkeakoulutukinnon suorittaneet (Finland)
- Bókasafnsfrøingar, bókaveroir meo háskólapróf (aorir en bókasafnsfrøingar) (Iceland)

and similarly for the other categories. Altogether, the staff is divided into three categories, but these again may be subdivided at the national level.

Data to be Included

The working document for decisions on which data to include was the Draft Proposal for revision of ISO 2789. With some minor differences, most of which were exclusions because of non-applicability to the libraries in question, everything included in the ISO/DP (as known after the May 1987 TC 46 meeting in Moscow) is included. In some cases, subdivisions are not included (e.g. different types of microforms, different types of audiovisual material, graphic and cartographic documents). Also, capital expenditure and number of sheets of paper copies produced by libraries are excluded.

Exclusion does not imply that these data cannot be submitted by the individual countries for the UNESCO statistics, as it only means that these data will not be collected and published on the Nordic level. The Nordic countries are in their national collection of statistical data from research libraries free to collect data that are more specific or that relate to quite different areas of library activities, and they do indeed do so. Some of these extra data will be included in the Nordic statistics. The staff categories are more detailed, as it has been mentioned.

The incomes of the libraries from sale of publications, consultancy work, information retrieval etc. is included. Documentation activities are included as part of the "library use" statistics, with data requested on the number of on-line searches, number of SDI-profiles, and number of documents abstracted to international databases.

For this purpose a definition of an online search has been agreed upon. This definition is very restrictive, in as much as it excludes all searches in data bases containing data on the library's own holdings.

Also, since the national libraries in the Nordic countries normally have extra functions (e.g. to be a university library) to fulfill, the national libraries are asked to submit data on the holdings of and additions to their national collections.

The overall result of these considerations was the completion of a Master Questionnaire to be used in the production of the national questionnaires. These national questionnaires shall, as laid down in an Agreement, differ from the Master Questionnaire only in language, typography, and by inclusion of extra questions on the national level.

Definitions of data categories

Finally, there had to be agreement on how the different types of data were to be understood and the appropriate items counted. This was achieved by developing a Guide to the Master Questionnaire, on the basis of the ISO definitions. These definitions were of course adhered to, but they were considered too general to be of much use by the individual librarians responsible for statistical data collection. An interpretation of the definitions were therefore given, together with examples where appropriate. In this way it is hoped that differing practices as to how and what to count to a great extent can be avoided.

Together with the Agreement and Master Questionnaire, this Guide forms an integral part of the foundations now laid down for the harmonization of Nordic research library statistics. The countries may not differ from the Guide any more than from the Master Questionnaire.

In the guide is included definitions and examples of the counting units (linear metres, physical units, volumes, titles, currency unit, full-time equivalent, on-line search), and of the individual questions of the questionnaire.

A single example will show the difference in level between the ISO Draft International Standard and the Nordic guide. The ISO definition of "physical unit" is as follows :

"physical unit : single document unit distinguished from other single units by a separate binding, encasement, or other technical device.

NOTE : Unbound serials should receive the same considerations as bound serials in respect of physical volume."

In the Nordic interpretation, this is expanded as follows (unofficial translation) :

Physical unit

A physical unit is a single library document, separated from other physical units by binding, encasement, or other similar technical devices. A physical unit is also normally equal to the unit in which the library material can be given on loan.

As physical units are thus counted the number of volumes, cases, cassettes, spools, reels, boxes, covers for holding microfiche, single microfiche, single sheets etc, such as they are or will be placed on the shelves or in other relevant furniture.

Unbound issues of periodicals are not counted as separate physical units, but are counted as if they were bound according to the library's normal rules for the volume size of a bound periodical.

Ephemera, pamphlets etc. that are not given a separate cataloguing are not treated as separate volumes and are counted only in linear metre and there as an individual sub-category.

A five-volume work is five physical units. Two books, catalogued separately, but bound into a single volumes, is one physical unit.

Six microfiche are counted as six physical units if they are placed separately (eg. In a drawer) and can be used or held on loan separately, but as one physical unit if they are kept together in a cover or a box.

Orchestra music consisting of one set of parts in one box, and one score volume, is two physical units. One sheet of music that has been catalogued separately is one physical unit if it is placed separately on the shelf. If it is placed together with other sheets of music in a case it is a part of the physical unit "case", however.

Twenty map sheets, put into three folded paper covers in one drawer is twenty physical units.

Twenty pamphlets in a box is one physical unit. One hundred standards (patents, sheets of music etc.) in one box is one physical unit. If the pamphlets are not catalogued separately, but treated as ephemera - see paragraph on Books and serials - they are, however, only counted in linear metres.

Additional copies are counted as separate physical units, this applies for instance also to microfilm of different polarities.

The examples given are of course not meant to be exhaustive, but to give an indication of the philosophy behind the interpretation. Not all explanations are as long as this, with four lines vs. one page. Usually one or two short paragraphs are enough. But important explanations tend to be long. Another example is that of "loan", which is defined in two lines in the ISO document, and is treated in a full page length in the Guide. The Guide consists of eighteen pages.

These documents (Agreement, Master Questionnaire and Guide) are to be published in Danish in a report from NORDINFO **) together with a detailed account of differences to ISO/DIS 2789 regarding the collection of data.

** Obtainable from NORDINFO, c/o Tekniska Högskolans
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LIBRARY STATISTICS FOR POLICY MAKING

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1st FEBRUARY 1988

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The workshop was held around the report prepared for the Commission by Phillip Ramsdale (titled 'A study of library economics of the EC' EUR 11546) and its recommendations.

These proceedings include the presentations of the speakers at the workshop and the results and recommendations emerging from the panel discussion.

The themes of the presentations range from library statistics for policy-making, the presentation of the Ramsdale report, the work of Unesco in this field over the last four decades, the issue of standardization, the example of Nordic Research Libraries in the harmonization of annual library statistics.

The list of participants is appended.

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