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पुस्तकालय आंकड़े

Information and Documentation —  
International Library Statistics

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## NATIONAL FOREWORD

This Indian Standard which is identical to ISO 2789 : 2022 Information and documentation — International library statistics' issued by the International Organization for Standardization (ISO) was adopted by the Bureau of Indian Standards on the recommendation of the Documentation and Information Sectional Committee and approval of the Management and Systems Division Council.

The text of the ISO standard has been approved as suitable for publication as an Indian Standard without deviations. Certain conventions are, however, not identical to those used in Indian Standards. Attention is particularly drawn to the following:

- a) Wherever the words 'International Standard' appear referring to this standard, they should be read as 'Indian Standard'; and
- b) Comma (,) has been used as a decimal marker while in Indian Standards, the current practice is to use a point (.) as the decimal marker.

In this adopted standard, reference appears to an International Standard for which Indian Standard also exists. The corresponding Indian Standard, which is to be substituted in its place, is listed below along with its degree of equivalence for the editions indicated:

<i>International Standard</i>	<i>Corresponding Indian Standard</i>	<i>Degree of Equivalence</i>
ISO 11799 Information and documentation — Document storage requirements for archive and library materials	IS 16790 : 2018/ISO 11799 : 2015 Information and documentation — Document storage requirements for archive and library materials	Identical

[Annex A](#), [Annex B](#), [Annex C](#) and [Annex D](#) are for  information only.

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## Introduction

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

[Clauses 3](#) and [7](#) form the core of this document. [Clause 3](#) provides definitions for most of the elements which constitute a library service; these are for statistical purposes only. [Clause 7](#) recommends how each of these elements should be counted. Users need to consult both clauses for the complete picture.

This document includes definitions and counting procedures for all types of resources and services that libraries offer to their users.

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

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

As the use of digital library services has become a main issue for showing the role and impact of libraries, [Annex C](#) has been added, giving an overview of methods for measuring digital usage.

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

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

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

*Indian Standard*

# INFORMATION AND DOCUMENTATION — INTERNATIONAL LIBRARY STATISTICS

## 1 Scope

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

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

## 2 Normative references

The following documents are referred to in the text in such a way that some or all of their content constitutes requirements of this document. For dated references, only the edition cited applies. For undated references, the latest edition of the referenced document (including any amendments) applies.

ISO 11799, *Information and documentation — Document storage requirements for archive and library materials*

## 3 Terms and definitions

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

ISO and IEC maintain terminology databases for use in standardization at the following addresses:

- ISO Online browsing platform: available at <https://www.iso.org/obp>
- IEC Electropedia: available at <https://www.electropedia.org/>

### 3.1 Library

#### 3.1.1

##### **academic library**

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

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

#### 3.1.2

##### **administrative unit**

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

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

Note 2 to entry: The administrative unit can be a single library or a larger organization, typically containing a central/main library, branch libraries and administrative functions. See the Example in [7.1.1](#).

### 3.1.3

#### **branch library**

part of a larger *administrative unit* (3.1.2) providing, in separate quarters, a service for a particular user group (e.g. children, faculties) or for a locally defined clientele

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

### 3.1.4

#### **central library**

#### **main library**

part or parts of an *administrative unit* (3.1.2) where centralized functions of administration, collections, and services are located

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

### 3.1.5

#### **external service point**

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

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

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

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

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

### 3.1.6

#### **library**

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

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

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

### 3.1.7

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

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

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

Note 2 to entry: This is a type of academic library.

### 3.1.8

#### **mobile library**

library, sometimes a division of a *public library* (3.1.10), using transport means, motorised or not, to provide documents and services directly to users as an alternative to access on library premises

EXAMPLE      Motor vehicles, carts, ships, bicycles, donkeys



### 3.1.9

#### **national library**

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

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

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

### 3.1.10

#### **public library**

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

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

### 3.1.11

#### **school library**

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

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

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

### 3.1.12

#### **special library**

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

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

Note 2 to entry: The statistics of special libraries should be collected and presented separately for those in the areas given in [3.1.12.1](#) to [3.1.12.7](#) (differentiated according to funding institutions).

#### 3.1.12.1

##### **government library**

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

#### 3.1.12.2

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

medical library

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

Note 1 to entry: Pharmaceutical company libraries are included under [3.1.12.4](#).

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

### 3.1.12.3

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

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

### 3.1.12.4

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

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

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

### 3.1.12.5

#### **media library**

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

### 3.1.12.6

#### **regional library**

major library serving a particular region whose primary function cannot be described as that of a public, school or *academic library* (3.1.1) nor as part of a national library network

### 3.1.12.7

#### **other special library**

any library not included elsewhere

EXAMPLE Library within voluntary organizations, museums, religious institutions.

### 3.1.13

#### **storage library**

library whose primary function is to store less-used material from other *administrative units* (3.1.2)

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

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

## 3.2 Library services and use

### 3.2.1

#### **access**

<virtual> successful request of a library-provided online service

### 3.2.2

#### **access**

<physical> right, opportunity, means of finding, using or retrieving information, of using a service, or entering a building

[SOURCE: ISO 15489-1:2016, 3.1, modified — "of using a service, or entering a building" have been added.]

### 3.2.3

#### **active borrower**

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

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

### 3.2.4

#### **active user**

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

Note 1 to entry: This includes active borrowers.

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

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

### 3.2.5

#### **blog**

weblog

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

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

### 3.2.6

#### **browser**

application allowing a person to retrieve and read hypertext, to view the contents of hypertext nodes (Web pages), to navigate from one Web page to another, and to interact with the content, such as changing the visual appearance of the displayed content

[SOURCE: ISO/IEC/IEEE 23026: 2015, 4.5]

### 3.2.7

#### **caching**

process of storing data in a temporary storage area on a mobile device, computer or server, so that future requests for that data are served up faster than is possible by accessing the data's primary storage location

### 3.2.8

#### **client**

soft- or hardware that can request specific services from a server

### 3.2.9

#### **device detection**

process of capturing accurate real-time intelligence about the devices being used to access online information

### 3.2.10

#### **digital service**

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

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

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

### 3.2.11

#### **diversity**

characteristics of differences and similarities between people

Note 1 to entry: Dimensions of diversity are demographic or other personal characteristics, often expressed statistically, for example, age, disability, sex, sexual orientation, gender, race, colour, nationality, ethnic or national origin, religion or belief.

[SOURCE: ISO 30415:2021, 3.7]

**3.2.12**  
**download**

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

**3.2.13**  
**educational services**

learning sessions and learning materials and programmes in all formats for children and adults for the purpose of enhancing skills in library and information use

Note 1 to entry: This includes the provision of services for schools and the cooperation with other libraries in preparing and offering educational services.

Note 2 to entry: Education of librarians is excluded.

[SOURCE: ISO 21248:2019, 3.22]

**3.2.14**  
**electronic document delivery (mediated)**

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

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

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

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

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

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

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

**3.2.15**  
**equity**

principle that people should be subject to policies, processes and practices that are fair, as far as possible, and free from bias

[SOURCE: ISO 30415:2021, 3.10]

**3.2.16**  
**event**

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

EXAMPLE Exhibitions, author visits, literary discussions, workshops.

Note 1 to entry: Only events arranged by the library on its own or in partnership with other institutions are included, whether inside or outside the library premises. Events inside the library premises organized by institutions outside the library without the library's cooperation are excluded.

Note 2 to entry: User training lessons and library tours are excluded.

Note 3 to entry: Ongoing programs are included. Each session of a program is counted as one event.

Note 4 to entry: Virtual events are included.

### **3.2.17**

#### **exhibition**

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

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

### **3.2.18**

#### **external document supply**

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

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

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

### **3.2.19**

#### **external user**

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

### **3.2.20**

#### **geolocation**

process or technique of identifying the geographical location of a person or device by means of digital information processed via the internet

Note 1 to entry: Frequently Global Positioning System (GPS) or related technologies are used for fixing geographic positions.

### **3.2.21**

#### **inclusion**

practice in which all individuals are treated fairly and respectfully, are valued for their distinctive skills, experiences, and perspectives and have equal access to resources and opportunities

### **3.2.22**

#### **indirect user**

non-registered user who uses library services via a registered user

### **3.2.23**

#### **informational question**

directional and/or administrative inquiry delivered to library staff

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

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

Note 3 to entry: For reference questions, see [3.2.43](#).

### 3.2.24

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

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

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

### 3.2.25

#### **interlibrary loan**

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

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

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

### 3.2.26

#### **Internet access**

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

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

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

### 3.2.27

#### **library website**

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

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

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

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

### 3.2.28

#### **like**

positive reaction to an information in social media

### 3.2.29

#### **loan**

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

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

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

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

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

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

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

### 3.2.30

#### **log file**

file automatically created by a server that maintains a record of its activities

[SOURCE: ISO/TR 14873:2013, 2.28]

### 3.2.31

#### **log file analysis**

evaluation of *log files* ([3.2.30](#)) of a computer system over a certain time based on specific criteria

### 3.2.32

#### **mobile device**

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

### 3.2.33

#### **non-user**

person belonging to a specific library's population to be served but not using that library's physical and/or digital services

Note 1 to entry: The definition includes former users of the library.

[SOURCE: ISO 16439:2014, 3.39]

### 3.2.34

#### **online catalogue**

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

### 3.2.35

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

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

### 3.2.36

#### **opt-in**

process or type of policy whereby the data subject is required to take a separate action to express specific, explicit or prior consent for a specific type of processing

[SOURCE: ISO/TS 17975:2015, 3.22]

### 3.2.37

#### **opt-out**

process or type of policy whereby the data subject is required to take a separate action in order to withhold or withdraw consent from a specific type of processing

Note 1 to entry: In the case of opt-out, implied consent exists for the collecting organization to process the personal information, unless the individual explicitly denies or withdraws permission. Opt-out is also a process provided by a data collecting organization in order for a data subject to deny or withdraw permission to perform a specific type of processing.

[SOURCE: ISO/TS 17975:2015, 3.23]

### 3.2.38

#### **page impression**

page view

access to a web page of an Internet site

### 3.2.39

#### **page tagging**

implementation of tags in the existing HTML-Code of a web page

### 3.2.40

#### **podcast**

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

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

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

### 3.2.41

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

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

### 3.2.42

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

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

Note 1 to entry: For public libraries, this will normally be the population of the legal service area (authority); for libraries of an institution of higher education, this will normally be the total of academic and professional staff plus students.

[SOURCE: ISO 11620:2014, 2.40]

### 3.2.43

#### **reference question**

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

Note 1 to entry: This can also involve recommendations, interpretation, or instruction in the use of such sources.

Note 2 to entry: One reference question can address several issues.

Note 3 to entry: The question can be delivered personally or by means of telephone, regular mail, fax or electronic media (via email, the library website or other networked communications mechanisms).

Note 4 to entry: It is essential that libraries do not include informational (directional and administrative) questions, e.g. for locating staff or facilities, regarding opening times or about handling equipment such as printers or computer terminals (see [3.2.23](#)).

### 3.2.44

#### **reference service**

provision of oral or written information and assistance, in response to requests, by the staff of an information and documentation organization

[SOURCE: ISO 5127:2017, 3.11.5.03]

### 3.2.45

#### **referrer**

website from which that the user has come to the current website or file

Note 1 to entry: In a HTTP request the browser sends the URL of the original website to the webserver.

### 3.2.46

#### **registered user**

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

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

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



### **3.2.47**

#### **rejected access**

turnaway

unsuccessful request of an online service via the library

Note 1 to entry: The failure can be due to the library having no license for the service or to the request exceeding the simultaneous user limit.

Note 2 to entry: Request failure because of wrong passwords is excluded.

### **3.2.48**

#### **renewal**

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

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

### **3.2.49**

#### **research support**

library service that allows a researcher to spend more time, more efficiently in his/her role as a researcher, and contributes positively to the quality of the research

Note 1 to entry: Generally, research support services are offered to academics at universities in order to support their role as researcher.

### **3.2.50**

#### **reservation**

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

### **3.2.51**

#### **search**

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

Note 1 to entry: A search is recorded each time a search request is submitted to the server.

Note 2 to entry: Immediately repeated duplicate searches, double clicks, or other evidence indicating unintended user behaviour are excluded.

### **3.2.52**

#### **social media**

online technologies and practices that people use to share opinions, insights, experiences and perspectives with each other, transforming traditional one-to many interactions into many-to-many interactions

[SOURCE: ISO 20252:2019, 3.95]

### **3.2.53**

#### **social network**

network on the Internet that allows internet users to communicate among each other and to share information

[SOURCE: ISO 5127:2017, 3.1.9.11]

### **3.2.54**

#### **streaming service**

online provider of entertainment (music, movies, etc.) that delivers the content via an Internet connection to the subscriber's computer, TV or mobile device

Note 1 to entry: A number of libraries provide access to streaming services for their users.

### 3.2.55

#### **tag**

pixel

code that is implemented on each page of an Internet site

### 3.2.56

#### **target population**

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

[SOURCE: ISO 11620:2014, 2.49]

### 3.2.57

#### **target population with special needs**

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

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

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

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

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

### 3.2.58

#### **user**

DEPRECATED: patron

DEPRECATED: customer

recipient of library services

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

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

[SOURCE: ISO 11620:2014, 2.51]

### 3.2.59

#### **user training**

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

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

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

### 3.2.60

#### **virtual event**

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

### 3.2.61

#### **visit**

<physical> individual entering the library premises

### 3.2.62

#### **visit**

<virtual> continuous cycle of user activities that starts when a user causes a page impression on a digital service

Note 1 to entry: A visitor is no physical person, but a browser or end device.

Note 2 to entry: Each following page impression that the user causes is counted as belonging to this visit.

Note 3 to entry: A visit is counted as finished when for more than 30 minutes no page impression has been caused by the user (time-out).

Note 4 to entry: The visit does not allow information about the time span or intensity of the activities.

Note 5 to entry: If possible, requests of a general entrance or gateway page should be excluded.

### **3.2.63**

#### **wiki**

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

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

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

## **3.3 Collections**

### **3.3.1**

#### **access rights**

rights for reaching or using the library collection

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

### **3.3.2**

#### **addition**

acquisition

document or item added to a collection during the reporting period

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

### **3.3.3**

#### **audiovisual document**

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

Note 1 to entry: This includes audio documents such as records, tapes, cassettes, audio compact discs, DVDs, files of digital audio recordings; visual documents such as slides, transparencies; and combined audiovisual documents, such as motion pictures, video recordings, computer games.

Note 2 to entry: Microforms are excluded.

### **3.3.4**

#### **book**

non-serial printed document in codex form

Note 1 to entry: A document in digital format that can be seen in analogy to a print book is defined as eBook.

### **3.3.5**

#### **born digital document**

document that has been created originally in digital form

### 3.3.6

#### **cartographic document**

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

Note 1 to entry: This includes documents such as two- and three-dimensional maps, globes, plans, topographic models, tactile maps and aerial representations, but excludes atlases and any other cartographic documents in codex, micro, audiovisual and digital form.

### 3.3.7

#### **CD-ROM**

compact disc read-only memory

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

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

### 3.3.8

#### **commercial publication**

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

### 3.3.9

#### **content unit**

original or a digest of other published work

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

Note 2 to entry: PDF, Postscript, HTML and other formats of the same content unit will be counted as separate items.

### 3.3.10

#### **database**

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

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

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

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

### 3.3.11

#### **dataset**

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

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

### 3.3.12

#### **descriptive record**

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

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

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

### **3.3.13 digital collection**

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

Note 1 to entry: The digital collection includes databases, electronic serials, and digital documents.

Note 2 to entry: Free Internet resources which have been catalogued by the library in its online catalogue or a database are counted separately (see [7.3.16](#)).

Note 3 to entry: The resources can be networked, installed on stand-alone workstations or stored on physical carriers.

### **3.3.14 digital document**

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

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

Note 2 to entry: Items incorporated in databases are covered by [3.3.10](#).

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

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

### **3.3.15 digital preservation**

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

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

### **3.3.16 digital preservation repository**

infrastructure, services, and resources for the preservation, storage, and management of digital content

Note 1 to entry: This is distinct from other digital repositories or infrastructure for providing online public access to digital content.

### **3.3.17 digitization**

process of converting analogue materials into digital form

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

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

Note 3 to entry: Mass digitization is included.

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

### **3.3.18 digitized collection**

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

### 3.3.19

#### **document**

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

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

[SOURCE: ISO 5127:2017, 3.1.1.38, modified — All Notes to entry has been replaced by one.]

### 3.3.20

#### **DOI**

Digital Object Identifier

standardized string for identifying a physical, digital, or abstract object and providing persistent resolution to the object or information about it

[SOURCE: ISO 5127:2017, 3.2.5.17, modified — Note 1 to entry has been omitted]

### 3.3.21

#### **DVD**

digital versatile disk

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

### 3.3.22

#### **eBook**

electronic book

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

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

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

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

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

### 3.3.23

#### **eBook reader**

eReader

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

### 3.3.24

#### **electronic serial**

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

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

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

Note 3 to entry: Open access journals are regarded as free Internet resources (see [3.3.26](#)).

### 3.3.25

#### **evidenced based acquisition**

EBA

e-book purchasing model much like patron driven acquisition (PDA), in which selection decisions are made based on the evidence of usage over the course of the agreement

Note 1 to entry: The difference between EBA and PDA is that EBA requires a fee upfront with limit to the number of titles that fee entitles you to at the end of the subscription period.

### 3.3.26

#### **free Internet resource**

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

### 3.3.27

#### **government document**

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

Note 1 to entry: Patents are dealt with in [3.3.46](#). Other government documents are counted in accordance with their format (see [A.3.3](#)).

### 3.3.28

#### **graphic document**

print document in which pictorial representation is the most prominent feature

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

### 3.3.29

#### **institutional repository**

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

### 3.3.30

#### **kit**

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

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

Note 2 to entry: Kits are counted as other library documents, see [7.3.10](#).

### 3.3.31

#### **library collection**

all documents provided by a library for its users

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

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

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

Note 4 to entry: Does not include links to Internet resources for which the library has not secured access rights by legal agreements (e.g. legal deposit right), licence or other contractual and/or cooperative agreement. Free Internet resources which have been catalogued by the library in its online catalogue or a database are counted separately (see [7.3.16](#)).

Note 5 to entry: Documents in institutional repositories are not included, but should be counted separately if the library is involved in collecting the items and/or operating the repository (see [7.3.17](#)).

### 3.3.32

#### **manuscript**

original document that is handwritten or in typescript

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

### 3.3.33

#### **microform**

photographic document, usually photographic film, that contains micro-images and requires magnification when used

Note 1 to entry: Microfiche, microfilm, microcard and microdot are included.

Note 2 to entry: Slides and similar documents are counted as audiovisual documents.

[SOURCE: ISO 5127:2017, 3.4.5.1.03, modified — Note 2 has been added.]

### 3.3.34

#### **minority language**

language used by nationals of a state who form a group numerically smaller than the rest of the state's population

Note 1 to entry: A minority language does not belong to the official languages of the state.

Note 2 to entry: Dialects of the official languages of the state are not included.

### 3.3.35

#### **monograph**

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

[SOURCE: ISO 5127:2001, 2.4.02]

### 3.3.36

#### **monographic series**

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

[SOURCE: ISO 9707:2008, 3.20]

### 3.3.37

#### **multimedia document**

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

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

### 3.3.38

#### **national collection**

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

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

[SOURCE: ISO/TR 28118:2009, 2.36, modified — Note 1 to entry has been added.]

### 3.3.39

#### **national imprint**

all documents in all formats published in a country

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

[SOURCE: ISO 21248:2019, 3.55]



### 3.3.40

#### **newspaper**

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

Note 1 to entry: Electronic newspapers are included.

### 3.3.41

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

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

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

### 3.3.42

#### **open access**

unrestricted access to information, documents or information services

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

[SOURCE: ISO 5127:2017, 3.11.1.05 modified — Note 1 to entry has been added]

### 3.3.43

#### **open access repository**

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

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

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

### 3.3.44

#### **other digital document**

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

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

### 3.3.45

#### **other library document**

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

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

### 3.3.46

#### **patent**

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

### 3.3.47

#### **patron driven acquisition**

#### **PDA**

e-book purchasing model, much like evidence based acquisition (EBA), in which selection decisions are made based on input from library users

Note 1 to entry: Libraries with limited budgets can set spending limits on their PDA plans.

### 3.3.48 periodical

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

Note 1 to entry: Series of reports, transactions of institutions, series of regular conference proceedings and annuals are included, while newspapers and monographic series are excluded.

Note 2 to entry: Electronic periodicals are included.

[SOURCE: ISO 9707:2008, 2.24, modified — The notes to entry have been replaced.]

### 3.3.49 physical carrier

portable device on which documents in digital format can be stored

EXAMPLE CD ROMs, USB sticks, DVDs, floppy disks.

Note 1 to entry: Physical carriers are only counted according to their contents as audiovisual document, database, digital document, or electronic serial, etc.

### 3.3.50 physical unit

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

EXAMPLE Volumes (books or serials), manuscripts, microforms, photographs, sheets, etc.

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

Note 2 to entry: For printed documents, the term “volume” is used for the physical unit (see also [3.3.61](#)).

### 3.3.51 printed music document

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

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

### 3.3.52 rare book

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

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

### 3.3.53 research data

data that were created or gathered in the process of research

Note 1 to entry: The data can be quantitative or qualitative, structured or unstructured.

Note 2 to entry: Dependent on the discipline, the data can be created in different ways, e.g. by experiments, measurements, observation, or surveys, and can take various forms, e.g. texts, statistical tables, laboratory values, measurement data, audio or visual recordings, or photographs.

Note 3 to entry: The end-results of the research such as monographs, journal articles, white papers, or presentations are not considered research data.

### **3.3.54**

#### **serial**

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

Note 1 to entry: Serials can include periodicals, journals, newspapers, annuals, etc.

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

[SOURCE: ISO 5127:2017, 3.4.1.28.01]

### **3.3.55**

#### **special collection**

collection of materials segregated from a library collection according to form, subject, genre, period, geographical area, condition, rarity, source or value

Note 1 to entry: Special collections are usually administered separately.

Note 2 to entry: Access to special collections can be restricted.

[SOURCE: ISO 21248:2019, 3.83]

### **3.3.56**

#### **stable condition**

suitability for use

Note 1 to entry: Stable material can have some damage, but can be used without immediate risk of further damage. Unstable material will be further damaged if used.

[SOURCE: ISO 21248:2019, 3.85]

### **3.3.57**

#### **stock**

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

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

### **3.3.58**

#### **title**

words or symbols at the head of a document that identify it and normally distinguish-it from other documents

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

Note 2 to entry: This applies equally to print, digital, audiovisual, and other library materials.

Note 3 to entry: A book or serial title can be distinguished from other such titles by its unique International Standard Book Number (ISBN) or International Standard Serial Number (ISSN).

[SOURCE: ISO 5127:2017, 3.7.4.01, modified — Note 1 has been omitted and new notes to entry have been added.]

### **3.3.59**

#### **USB**

Universal Serial Bus

serial system for connecting a computer with external devices

### 3.3.60

#### **USB key**

flash drive

data stick

small, lightweight, removable, rewritable storage device that can be connected to a computer or other piece of electronic equipment to copy and store information

### 3.3.61

#### **volume**

physical unit of any printed, typewritten, handwritten or mimeographed work, distinguished from other units by a separate binding, encasement, portfolio, or other clear distinction

Note 1 to entry: A serial volume is either bound or it comprises the serial issues that would be bound together if the library bound all serials.

### 3.3.62

#### **withdrawal**

document or item withdrawn from a collection during the reporting period

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

Note 2 to entry: Can also be referred to as deaccessioned or weeded items.

## 3.4 Access and facilities

### 3.4.1

#### **closed stacks**

stacks that are not accessible to users

[SOURCE: ISO/TR 11219:2012, 2.19]

### 3.4.2

#### **gross floor area**

sum of all floor areas of all levels of a building

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

### 3.4.3

#### **library makerspace**

area and/or service that offers visitors an opportunity to create intellectual and physical materials using resources such as computers, 3-D printers, audio and video capture and editing tools, and traditional arts and crafts supplies

Note 1 to entry: People can work alone or can gather to work on projects while sharing ideas, equipment, and knowledge.

Note 2 to entry: Makerspaces can be virtual only.

### 3.4.4

#### **linear metre**

measure of shelf space for the net space on a shelf, without supporting construction

[SOURCE: ISO/TR 11219: 2012, 2.43]

### 3.4.5

#### **national bibliography**

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

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

[SOURCE: ISO 21248:2019, 3.53]

### **3.4.6**

#### **network**

computer network

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

### **3.4.7**

#### **open stacks**

stacks that are accessible to users

[SOURCE: ISO/TR 11219:2012, 2.54]

### **3.4.8**

#### **opening hours**

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

### **3.4.9**

#### **public access workstation**

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

### **3.4.10**

#### **unstaffed opening hours**

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

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

### **3.4.11**

#### **usable area**

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

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

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

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

### **3.4.12**

#### **user place**

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

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

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

### **3.4.13**

#### **WLAN**

#### **WIRELESS LOCAL AREA NETWORK**

local area network that uses RF signals to transmit and receive data

[SOURCE: IEC 80001-2-3:2012, 3.85]

## 3.5 Management

### 3.5.1

#### **conservation**

preservation measures and actions applied to prevent, arrest or delay deterioration of a document or other material object

[SOURCE: ISO 5127:2017, 3.12.1.01]

### 3.5.2

#### **consortium**

association of independent libraries and/or library systems, established by formal agreement, usually for the purpose of resource sharing

Note 1 to entry: Membership can be restricted to a specific geographic region, type of library (public, academic, special), or subject specialization.

### 3.5.3

#### **cooperative project**

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

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

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

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

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

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

### 3.5.4

#### **library research**

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

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

### 3.5.5

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

research publication by library staff in professional and academic subjects

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

### 3.5.6

#### **partnership**

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

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

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

Note 3 to entry: Time-limited cooperation on a specified project is excluded and counted as a cooperative project (see [3.5.3](#)).

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

### 3.5.7

#### **preservation**

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

[SOURCE: ISO 5127:2017, 3.2.1.39, modified — Notes 1 and 2 to entry have been omitted.]

### 3.5.8

#### **project**

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

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

[SOURCE: ISO 9000:2015, 3.4.2, modified — A note to entry has been added.]

### 3.5.9

#### **publishing by libraries**

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

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

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

### 3.5.10

#### **retrospective cataloguing**

addition to the online catalogue of records for material that is currently recorded only on cards or in other non-machine-readable formats

Note 1 to entry: The material concerned includes print and archival collections.

### 3.5.11

#### **restoration**

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

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

[SOURCE: ISO 5127:2017, 3.12.1.02, modified — The term “preservation” has been excluded in the definition, and Note 2 to entry has been omitted.]

## 3.6 Funding and expenditure

### 3.6.1

#### **capital expenditure**

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

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

### 3.6.2 endowment

fund that is made up of gifts and bequests which require that the principal be maintained intact and invested to create a source of income for an organization

Note 1 to entry: An endowment requires that the principal remain intact in perpetuity, or for a defined period of time or until sufficient assets have been accumulated to achieve a designated purpose.

[SOURCE: ISO 18461:2016, 2.7.3]

### 3.6.3 open access publishing fees

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

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

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

### 3.6.4 operating expenditure

ordinary expenditure  
expenditure incurred in the running of a library

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

### 3.6.5 pay-per-view

service enabling libraries and users to purchase immediate access to the full text of an article or to research data without subscribing to the periodical or other source in which it was published

### 3.6.6 special grant

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

## 3.7 Library staff

### 3.7.1 library employee

person who works for a library in return for payment

### 3.7.2 other staff

all other *library employees* ([3.7.1](#)) without formal qualifications in librarianship/information science or other relevant specialization

### 3.7.3 professional education

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

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



### 3.7.4

#### **professional staff**

library employee who has received training in librarianship and/or information science and whose duty requires *professional education* (3.7.3) or experience

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

### 3.7.5

#### **qualified specialist staff**

*library employee* (3.7.1) who has received training in a specialist discipline other than librarianship and/or information science

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

### 3.7.6

#### **staff training**

formal pre-planned training in professional skills and competences, including social skills

Note 1 to entry: The training can be held in-house or externally, and delivered by library staff or external experts.

Note 2 to entry: Web-based training services are included.

Note 3 to entry: Informal training, e.g. point-of-use training, is excluded.

### 3.7.7

#### **subject librarian**

librarian with advanced education and/or experience in a particular subject or academic discipline

### 3.7.8

#### **volunteer**

person working on library tasks without payment

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

## 4 Current tasks of libraries

### 4.1 General

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

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

Public libraries become more important as cultural and social centres. Developments related to specially designed services for socially disadvantaged groups, youth and cooperative projects increase in numbers.

Library services offered on the Internet, especially via social media, are now important for users to reach resources and information. These changes are ongoing and affect all types of libraries. However, there are still considerable differences in the mission and tasks of the different library types.

## 4.2 Types of libraries

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

- a) academic libraries — libraries whose primary function is to cover the information needs of learning and research (libraries of institutions of higher education, general research libraries);
- b) public libraries — general libraries that serve the information needs of the whole population of a local or regional community, with emphasis on both formal and individual education, literacy, life-long learning, personal creative development, cultural and recreational activities;
- c) school libraries — libraries attached to all types of schools below the third (tertiary) level of education whose primary function is to serve the pupils and teachers of such a school and function as an educational resource;
- d) special libraries — libraries covering one discipline or particular field of knowledge or a special regional interest, or primarily serving a specific category of users. Special libraries can also be sponsored by an organization to serve its own work-related objectives. Examples are industrial and commercial libraries, media libraries, government libraries, health service and hospital libraries, or libraries of professional and learned institutions and associations;
- e) national libraries — libraries which are responsible for acquiring and conserving copies of all relevant documents published in the country in which the library is located, usually via legal deposit. The national collection usually comprises also the national documentary heritage in the form of manuscripts, archival materials, cartographic material, printed music documents, pictures, photographs and audiovisual documents in traditional or digital format. Tasks of national libraries are listed in a separate standard [ISO 21248:2019, 4.1].

In a number of cases, there are libraries that have integrated two or more library types and therefore have different tasks in their different functions. The operation can be based on a formal agreement for cooperation, or a library of one organization can take responsibility for the library activity of other organizations. Examples include integrated school and public libraries; joint academic and learned society libraries; joint public and academic libraries. Such libraries are not considered to be a separate type, but should either choose their main function, or divide their functions accordingly (see [7.1.1](#)).

## 4.3 Changes in user activities

### 4.3.1 Activities inside the library premises

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

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

Group work has become crucial for learning, therefore group working areas are increasingly offered. Public libraries offer places for events and exhibitions at the same time as access to technical equipment.

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

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

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

#### **4.3.2 Activities outside the library premises**

Libraries strive to service their users where ever they are via the library website and social media. They offer access to catalogues and digital media, but also blogs, apps, wikis, podcasts or videocasts to educate, stimulate or inform their users. This has become more important since more materials are digitized.

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

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

## **5 Uses and benefits of statistics**

### **5.1 Background**

#### **5.1.1 General**

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

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

#### **5.1.2 Objectives**

The objectives for library statistics can be summarized as follows:

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

### **5.1.3 Quality**

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

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

## **5.2 Developments in library practice**

### **5.2.1 Contents of library statistics**

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

### **5.2.2 Sampling**

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

### **5.2.3 Data for performance measures**

For quite some time, there have been developments to measure and compare the quality and effectiveness of library services and the efficiency of the use of resources. For this purpose, performance indicators have been developed by the library community. This document specifies data provision required by the performance indicators specified in ISO 11620 and ISO 21248:

### **5.2.4 Impact data**

Recently, the importance of showing the impact of libraries has been emphasized. Such impact can concern literacy and information literacy, educational or professional success, social inclusion or cultural identity. This document specifies statistics which can be instrumental to impact assessment, as described in ISO 16439.

### **5.2.5 Other developments**

This document takes up new developments in library services, especially issues such as research support and research data management, and measures for digital usage. Though such services and measures are still developing and data change quickly, it was deemed expedient to include statistics and counting methods for these services, as far as can be identified at this time, into this document.

Since the 5<sup>th</sup> edition (2013), this document addresses issues of “EDI”, equity, diversity and inclusion in libraries by counts for target populations with special needs. In this current edition, differentiations of staff and users as to age, gender and preferred language have been added. More statistics will be developed in this field during the next years.

## **5.3 Selection of statistics for the library**

This document recognizes that there are many different types of libraries, in different settings, serving different user groups and having a range of unique characteristics (structure, funding, governance,

etc.). Not all statistical data named in this document will be relevant for all types of libraries and there will be much additional data relevant for individual libraries.

## 5.4 Use of statistics

### 5.4.1 General

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

### 5.4.2 External communication

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

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

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

## 5.5 Presenting statistics to stakeholders

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

Stakeholders of libraries will normally be:

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

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

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

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

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

## **6 Reporting statistical data**

### **6.1 General**

Statistics referred to in this document should be drawn up at regular intervals, for example annually. The information given should be presented in conformity with the definitions of [Clause 3](#) and should, unless otherwise stated, be in accordance with the recommendations in this document. Every item and activity should be counted as mutually exclusive, i.e. not in more than one category (for example "book" or "digital document"; "interlibrary lending", "electronic document delivery (mediated)" or "external document supply").

### **6.2 Time period to which data refer**

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

### **6.3 Data estimated by sample**

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

## **7 Collecting statistical data**

### **7.1 Libraries**

#### **7.1.1 Counting administrative units and libraries**

Each library should appear in one of the categories defined in [3.1](#) according to its primary function. Where a library has more than one function or where a joint library is formed by more than one organization (e.g. school library and public library), the library either decides what its primary function is or, in extreme cases, divides its functionality and report data accordingly.

The following statistics should be supplied for each entity:

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

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

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

## 7.1.2 Counting types of libraries

### 7.1.2.1 National library

The following should be counted:

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

### 7.1.2.2 Library of an institution of higher education

The following should be counted:

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

If non-academic staff is included, this should be mentioned.

### 7.1.2.3 Special library

The following should be counted:

- a) number of administrative units; the recommended classification for reporting by type is as follows:

- government (including agencies and international organizations);
- health service/medical;
- professional and learned institutions and associations;
- industrial and commercial;
- media;
- regional;
- other special library (including voluntary organizations);

b) number of libraries in each of the above areas.

For special libraries that have been set up for a specified population, the number of the population to be served can be calculated.

#### EXAMPLES

- For industrial and commercial libraries, count the number of employees (persons, not FTE).
- For patients' libraries that are connected to hospitals, count the number of patients that had hospital treatment during the reporting period.

#### **7.1.2.4 Public library**

The following should be counted:

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

Public libraries that are financed mainly by public authorities and those that are financed mainly from private sources can be counted separately.

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

NOTE 1 This is normally the population of the legal service area.



NOTE 2 For supra-local library systems (e.g. district libraries), count the inhabitants of the localities belonging to the system.

#### **7.1.2.5 School library**

The following should be counted:

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

#### **7.1.2.6 Storage library**

The following should be counted:

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

### **7.2 Services and use**

#### **7.2.1 General**

This subclause covers the use of both traditional and digital library services, including services offered on the Internet and services formatted for mobile devices.

#### **7.2.2 Users**

##### **7.2.2.1 Number of users**

The following should be counted:

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

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

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

NOTE 3 e) only applies, if it is possible to identify digital use and visits of the individual user, or if data can be obtained by means of surveys.

d) and e) should be counted separately, as the data will overlap.

### **7.2.2.2 Types of users**

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

A public library could categorize the following user groups:

- a) individual user:
  - child (up to and including age 13);
  - young adult (from 14 up to and including age 17);
  - adult;
  - senior (>65 years);
- b) institutional user;
- c) library staff;
- d) other target groups, e.g. users served at home.

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

NOTE 2 Other libraries are counted separately.

NOTE 3 External users could be counted separately.

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

- undergraduate student (full-time/part-time);
- graduate student (full-time/part-time);
- faculty/research staff; library staff;
- other library or institution;
- professional user (personal/corporate);
- other external users.

NOTE 4 Further subdivision for a), b) and c) can be made by faculty.

NOTE 5 Other libraries are counted separately.

For a school library, the following categories can apply:

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

### **7.2.3 Lending services**

#### **7.2.3.1 Loans (excluding interlibrary lending)**

Loans are counted in the following categories:

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

— number of eBook loans (contents only transmitted to users).

NOTE 1 Short loans are included.

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

NOTE 3 Renewals are excluded.

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

NOTE 5 See also [A.2.1.2](#).

b) number of on-site loans.

### **7.2.3.2 Renewals**

Renewals are counted in the following categories:

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

### **7.2.3.3 In-house-use**

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

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

The method used should be reported.

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

On-site loans should, if possible, be excluded or deducted to avoid double counting with [7.2.3.1](#).

### **7.2.3.4 Reservations**

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

Of these, count the reservations that led to actual loans.

## **7.2.4 Interlibrary lending**

### **7.2.4.1 Interlibrary lending within the country**

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

The following should be counted:

- a) total number of requests received from other libraries;
- b) number of interlibrary loan requests satisfied, by form:

- number of loans supplied as returnable (materials that the library expects to have returned); these are generally original documents;

EXAMPLE 1 books, dissertations and theses, microfilm reels, sound recordings, and audiovisual material

- number of loans supplied as non-returnable (materials that the library does not expect to have returned); these are generally copies in print or microform in place of original documents.

EXAMPLE 2 Photocopies or facsimiles, fiche-to-fiche copies, print copies from microfilm, and gratis print copies of unpublished reports and/or departmental working papers

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

NOTE 1 Renewals of supplied loans are excluded, but can be counted separately.

NOTE 2 Mediated transmission of documents in electronic form is counted as electronic document delivery (mediated).

NOTE 3 Direct borrowing between consortium members is included.

NOTE 4 Transactions between libraries under the same administration are excluded.

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

The following should be counted:

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

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

NOTE 1 Renewals of received loans are excluded, but can be counted separately.

NOTE 2 Mediated transmission of documents in electronic form is counted as electronic document delivery (mediated).

NOTE 3 Direct borrowing between consortium members is included.

NOTE 4 Transactions between libraries under the same administration are excluded.

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

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

The following should be counted:

- a) total number of requests received from other countries;
- b) number of interlibrary loan requests satisfied by form:
  - number of loans supplied as returnable (materials that the library expects to have returned); these are generally original documents;

EXAMPLE 1 books, dissertations and theses, microfilm reels, sound recordings, and audiovisual material

- number of copies supplied as non-returnable (materials that the library does not expect to have returned); these are generally copies in print or microform in place of original documents.

EXAMPLE 2 Photocopies or facsimiles, fiche-to-fiche copies, print copies from microfilm, and gratis print copies of unpublished reports and/or departmental working papers.

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

NOTE 1 Renewals of supplied loans are excluded, but can be counted separately.

NOTE 2 Mediated transmission of documents in electronic form is counted as electronic document delivery (mediated).

#### 7.2.4.2.2 Interlibrary loan requests made to other countries

The following should be counted:

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

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

NOTE 1 Renewals of received loans are excluded, but can be counted separately.

NOTE 2 Mediated transmission of documents in electronic form is counted as electronic document delivery (mediated).

#### 7.2.4.3 Loans to exhibitions

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

Count the number of items that were borrowed by the library from other institutions for the purpose of exhibitions during the reporting year.

### 7.2.5 Reference and informational questions

#### 7.2.5.1 Reference questions

Count the number of reference questions (see also [A.2.1.4](#)).

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

If data collection over the complete reporting period is not possible, the annual total is to be established from a sample count. The sample should be taken in one or more normal weeks and grossed up.

#### 7.2.5.2 Informational questions

Count the number of directional and/or administrative questions (see also [A.2.1.5](#)).

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

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

If data collection over the complete reporting period is not possible, the annual total is to be established from a sample count. The sample should be taken in one or more normal weeks and grossed up.

## 7.2.6 Copying

### 7.2.6.1 Photocopies and microforms produced by libraries

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

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

NOTE Copies in electronic form are counted as electronic document delivery (mediated) (see [7.2.7](#)).

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

The following should be counted:

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

## 7.2.7 Electronic document delivery (mediated)

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

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

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

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

## 7.2.8 External document supply

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

- a) print;
- b) electronic.

## 7.2.9 Events organized by the library

### 7.2.9.1 Number of events

The following should be counted:

- a) number of exhibitions;
- b) of a), the number of virtual exhibitions;

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

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

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

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

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

### 7.2.9.2 Attendances at events

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

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

Attendances at events may be estimated.

### 7.2.10 Physical visits

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

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

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

Visits to events should be counted separately (see [7.2.9.2](#)).

### 7.2.11 User orientation and training

The following should be counted:

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

d) number of accesses to web-based training services offered by the library.

NOTE 1 One hour of training (60 minutes) can include a timetabled break of up to 15 minutes.

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

NOTE 3 Staff time spent on the preparation of user training is counted in [7.7.9.9](#).

## 7.2.12 Use of digital resources and services

### 7.2.12.1 General

This clause describes metrics that measure the use of a library's digital services as well as of its digital resources.

Data about the use of digital resources that the library offers have often to be compiled from various sources. For documents that the library has purchased or licensed, use statistics are generally delivered by the provider, if the documents are stored on the provider's server.

A number of providers conform to the COUNTER Code of Practice, that since 2003 has in several revised versions defined statistics for the use of digital resources. COUNTER supports the process of collection assessment by providing standards for vendors and publishers to follow in delivering usage data to libraries. The COUNTER Code aims for usage data to be credible, consistent, and comparable. The purpose is to compare usage reports by different vendors, so that librarians can assess their user activities with different purchased digital collections.

Usage data for the digitized collection and other non-commercial digital resources can generally be collected from a library's or institution's own servers or via tools such as Google Analytics. The library should try to add the data from different sources in order to achieve total numbers, for instance the total number of searches.

### 7.2.12.2 Number of searches

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

NOTE Mistyped search strings do not represent unique intellectual inquiries. In practice, however, libraries will have difficulty in differentiating these unintended searches from intended, but unsuccessful, searches [7.2.12.3](#).

### 7.2.12.3 Number of visits

Count the total number of visits to a library-supplied online service.

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

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

### 7.2.12.4 Number of rejected accesses (turnaways)

Count the number of unsuccessful requests of online services via the library's website.

Count the following separately:

- a) rejected access because the library has no license for the service;
- b) rejected access because the request exceeds the simultaneous user limit.

NOTE Request failure because of wrong passwords is excluded.



#### **7.2.12.5 Number of downloads**

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

NOTE 1 Browser or proxy caching will be likely to reduce the number of requests registered in log files.

NOTE 2 Downloads can be differentiated as to the type of document or part of document that has been downloaded.

NOTE 3 In addition, downloads can be differentiated as to the online service from which they are requested.

#### **7.2.12.6 Number of Internet accesses**

Count the following separately:

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

The data can be provided by the network administrator.

The data collection will be affected by legal regulations.

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

NOTE Internet accesses from a user's private device outside the library's network generally cannot be measured, but might be estimated by surveying users.

#### **7.2.12.7 Use of the digitized collection**

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

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

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

#### **7.2.12.8 Use of documents in the institutional repository**

The following should be counted as to the use of the documents:

- number of visits to the repository;
- number of downloads of content units (complete documents or parts of documents).

#### **7.2.13 Number of website visits**

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

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

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

Visits via apps on mobile devices should be counted separately.

If a library has several websites for different purposes or in different languages, the visits on each website should be counted separately, but may be summed up.

## **7.2.14 Services for mobile devices**

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

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

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

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

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

### **7.2.14.2 Usage counts**

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

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

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

NOTE 3 If it is a specialized application, usage numbers are usually capturable through that application.

## **7.2.15 Social network services**

### **7.2.15.1 Membership on social networks**

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

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

### **7.2.15.2 Contents units on social networks**

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

The counts should be summed for all services.

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

### **7.2.15.3 Usage of library services on social networks**

The counting is restricted to the data that the networks provide in their data pools. Checking these data is in most cases not possible.

Count as core datasets:

- a) number of visits to the library's account;
- b) number of subscribers (e.g. fans/followers) to the library's account.

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

- c) number of downloads of documents that the library has uploaded on a social network;
- d) number of posts or new entries within the library's account;
- e) number of likes.

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

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

NOTE 3 Third party tools can also provide usage data.

## 7.2.16 Services for target populations with special needs

### 7.2.16.1 General

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

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

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

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

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

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

- a) special collections;

EXAMPLE 1 Brochures and newspapers for job-seeking persons, easy-to-read materials for people with various levels of reading disabilities, digital sign language material for deaf persons.

- b) special events;

EXAMPLE 2 Author reading in a minority language, descriptive tours of library exhibitions for blind and low-vision visitors.

- c) User training;

EXAMPLE 3 Language courses for new arrivals, multimedia learning program for hearing impaired people.

- d) long-term services.

EXAMPLE 4 Media transport for house-bound persons, reference service in a minority language, regular reading groups for a specified population, job service for unemployed persons.

### 7.2.16.2 Special collections

The following should be counted:

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

NOTE 1 Each target population is counted separately. This can be subdivided in accordance with the subdivisions in [7.3.2](#) to [7.3.14](#) and [A.2.2](#).

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

NOTE 2 Each target population is counted separately. This can be subdivided in accordance with the subdivisions in [7.3.2](#) to [7.3.14](#) and [A.2.2](#).

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

NOTE 3 Each target population is counted separately. This can be subdivided in accordance with the subdivisions in [7.3.11](#) to [7.3.14](#) and [A.2.2](#).

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

NOTE 4 Each target population is counted separately. This can be subdivided in accordance with the subdivisions in [7.3.11](#) to [7.3.14](#) and [A.2.2](#).

### 7.2.16.3 Use of the special collections

The following should be counted:

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

NOTE 1 Each target population is counted separately. This can be subdivided in accordance with [7.3.2](#) to [7.3.14](#). This can also be subdivided in accordance with the categories for stock in [A.2.2](#).

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

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

NOTE 3 Each target population is counted separately.

NOTE 4 The count can include use by other than members of the target population.

### 7.2.16.4 Events for target populations with special needs

The following should be counted:

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

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

### 7.2.16.5 User training for target populations with special needs

The following should be counted:

- a) total number of training lessons;
- b) total hours of user training undertaken by the library, either in the orientation of collections, services and facilities or in the use of information resources;

- c) number of attendances by members of the target population at user-training lessons;
- d) number of accesses to web-based training services offered by the library.

NOTE Each target population is counted separately.

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

The following should be counted:

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

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

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

### **7.3 Collection**

#### **7.3.1 General**

For further subdivisions of the categories in [7.3.2](#) to [7.3.15](#), see [Annex A](#).

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

##### **7.3.2.1 Stock**

The following should be counted:

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

NOTE 1 Where a count of physical units is not feasible, an alternative measure is the length of shelving occupied by stock (see [7.4.9.4](#)). This space measure can also be used to estimate the number of physical units.

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

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

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

##### **7.3.2.2 Additions**

The following should be counted:

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

NOTE 1 As an alternative, the number of linear metres added to total stock can be calculated.

- b) number of titles added.

NOTE 2 This will frequently equal the number of new catalogue records added (see [7.4.5](#)).

### **7.3.2.3 Withdrawals**

The number of physical units withdrawn should be counted.

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

### **7.3.3 Manuscripts**

#### **7.3.3.1 Stock**

The following should be counted:

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

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

#### **7.3.3.2 Additions**

The following should be counted:

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

#### **7.3.3.3 Withdrawals**

The number of physical units withdrawn should be counted.

### **7.3.4 Microforms**

#### **7.3.4.1 Stock**

The number of physical units should be counted.

#### **7.3.4.2 Additions**

The number of physical units added should be counted.

#### **7.3.4.3 Withdrawals**

The number of physical units withdrawn should be counted.

### **7.3.5 Cartographic documents**

#### **7.3.5.1 Stock**

The number of physical units should be counted.

#### **7.3.5.2 Additions**

The number of physical units added should be counted.

#### **7.3.5.3 Withdrawals**

The number of physical units withdrawn should be counted.

### 7.3.6 Printed music documents

#### 7.3.6.1 Stock

The following should be counted:

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

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

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

#### 7.3.6.2 Additions

The following should be counted:

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

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

#### 7.3.6.3 Withdrawals

The number of physical units withdrawn should be counted.

### 7.3.7 Audiovisual documents

#### 7.3.7.1 Stock

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

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

**NOTE** Physical units will usually be CD cases, record sleeves or cassettes, or video boxes.

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

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

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

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

### **7.3.7.2 Additions**

Count the number of audiovisual documents added:

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

The categories should be subdivided by type:

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

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

### **7.3.7.3 Withdrawals**

Count the number of audiovisual documents withdrawn:

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

## **7.3.8 Graphic documents**

### **7.3.8.1 Stock**

The number of physical units should be counted.

### **7.3.8.2 Additions**

The number of physical units added should be counted.

### **7.3.8.3 Withdrawals**

The number of physical units withdrawn should be counted.

## **7.3.9 Patents**

### **7.3.9.1 Stock**

Count the number of patents in the library collection:

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

### **7.3.9.2 Additions**

Count the number of patents added:

- in print or microform format;



— in electronic format.

### **7.3.9.3 Withdrawals**

Count the number of patents withdrawn:

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

## **7.3.10 Other library documents and items**

### **7.3.10.1 Stock**

The number of physical units should be counted.

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

### **7.3.10.2 Additions**

The number of physical units added should be counted.

### **7.3.10.3 Withdrawals**

The number of physical units withdrawn should be counted.

## **7.3.11 eBooks**

### **7.3.11.1 Stock**

Count the total number of eBooks (titles) in the digital collection at the end of the reporting period.

eBooks which are freely accessible on the Internet, such as open access eBooks, and titles open through national programs, should be excluded.

Books digitized by the library out of its analogue collection should be counted separately.

eBooks that were acquired via legal deposit should be counted separately.

eBooks available to users via PDA/EBA should be counted separately.

NOTE The numbers can vary greatly over the year due to changes in large eBook packages (subscriptions).

### **7.3.11.2 Additions**

The following should be counted (titles):

- a) number of eBooks added by purchase;
- b) number of eBooks added through subscription;
- c) number of eBooks added via legal deposit;
- d) number of eBooks added by digitization by the library;

- e) number of eBooks added as available through Patron Driven Acquisitions (PDA) or Evidence-based acquisition plans (EBA).

NOTE eBooks purchased through PDA /EBA programs and added to the library collection should be counted as added by purchase.

### **7.3.11.3 Withdrawals**

The following should be counted (titles):

- a) number of eBooks withdrawn that had been added by purchase;
- b) number of eBooks withdrawn that had been added through subscription
- c) number of eBooks withdrawn that had been added by digitization by the library;
- d) number of eBooks withdrawn that had been added through PDA/EBA programs.

NOTE This includes eBooks which are no longer accessible following the termination of a patron driven or evidence-based acquisition plan or the purchase by the library after a certain number of uses.

### **7.3.12 Other digital documents**

#### **7.3.12.1 Stock**

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

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

NOTE 1 Physical carriers are usually available for lending or use on stand-alone workstations in the library.

NOTE 2 The documents can also be counted separately as to types, e.g. cartographic documents, music documents, or archival materials.

#### **7.3.12.2 Additions**

Count the number of other digital documents added:

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

#### **7.3.12.3 Withdrawals**

Count the number of other digital documents withdrawn:

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

### **7.3.13 Databases**

#### **7.3.13.1 Stock**

Count the number of databases in the library collection:

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

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

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

### 7.3.13.2 Additions

Count the number of databases added:

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

### 7.3.13.3 Withdrawals

Count the number of databases withdrawn:

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

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

### 7.3.14.1 In print or microform

The following should be counted:

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

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

Monograph series, other reports and proceedings of occasional conferences are to be included in [7.3.2](#) or [7.3.4](#).

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

### 7.3.14.2 Electronic serials

The following should be counted:

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

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

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

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

Electronic journals in free Internet resources which have been catalogued by the library in its online catalogue or a database should be counted and reported separately (see [7.3.16](#)).

Electronic journals accessible via national deals should be counted separately.

#### **7.3.14.3 Serials in total**

The following should be counted:

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

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

#### **7.3.15 Multimedia documents**

Documents combining different information media (e.g. text, graphics, photos, video, audio) for interactive use, in digital format are counted according to their main features or purposes e.g. as a database, an electronic serial or a digital document.

#### **7.3.16 Free Internet resources**

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

Double titles should be excluded if possible.

#### **7.3.17 Documents in institutional repositories**

Count the number of documents in institutional repositories, if the library is involved in collecting the items and/or operating the repository.

The following should be counted as to the contents of the repository:

- a) number of archived documents, e.g. journal articles, theses or doctoral dissertations, conference papers, reports, preprints, learning material, datasets;
- b) number of those with unrestricted access;
- c) number of documents added during the reporting period;

NOTE 1 Learning material and datasets could be counted separately.

NOTE 2 A dataset is counted as one document.

- d) number of items held as bibliographical records only;
- e) number of records without documents added during the reporting period.

#### **7.3.18 Data in institutional research data repositories**

Statistics of research data repositories should only be collected, if the library is involved in collecting or curating the items and/or operating the repository.

The following should be counted as to the contents of the repository:

- a) number of archived datasets with Digital Object Identifiers (DOIs);
- b) number of datasets added during the reporting period;

NOTE Documents such as monographs, journal articles, reports or presentations are excluded.

- c) number of gigabytes or terabytes;
- d) number of visits to the depository;
- e) number of downloads of free accessible datasets.

## **7.4 Access and facilities**

### **7.4.1 Opening hours**

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

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

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

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

### **7.4.2 Days open**

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

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

### **7.4.3 User places**

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

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

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

### **7.4.4 Public access workstations**

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

NOTE User places where users can connect their own computer to the Internet are counted in 6.4.3.

#### 7.4.5 Catalogue records

The following should be counted:

- a) total number of catalogue records (bibliographic records) at the end of the reporting period;
- b) percentage of these in digital format;
- c) of a), the number added during the year.

#### 7.4.6 Reprographic facilities

The following should be counted separately:

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

NOTE One machine can serve all three functions.

#### 7.4.7 eBook readers

The following should be counted:

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

#### 7.4.8 Other equipment available for public use

The following should be counted:

- a) total number of other devices available for public use;
- b) number of these available for loan.

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

EXAMPLES Laptops, tablets, USB keys, DVD players, headphones, retro gaming systems, calculators, cables, powerbanks.

#### 7.4.9 Space

##### 7.4.9.1 Usable area for library functions

The usable area is expressed in square metres.

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

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

#### 7.4.9.2 Usable area by function

The usable area calculated in [7.4.9.1](#) can be allocated to the following main functions:

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

The total of a), b), c) and d) should be equal to the area reported in [7.4.9.1](#).

#### 7.4.9.3 Gross floor area of library buildings

The gross floor area is expressed in square metres.

This is the total space in the library building or buildings and will include those areas specifically excluded from [7.4.9.2](#).

#### 7.4.9.4 Shelf counts

The following should be counted:

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

### 7.5 Management

#### 7.5.1 Cooperation

##### 7.5.1.1 Cooperative projects

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

International projects should be counted separately.

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

Ad hoc cooperation should be excluded.

##### 7.5.1.2 Partnership

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

International partnerships should be counted separately.

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

### 7.5.2 Library staff research publications

Count the number of library staff research publications per year.

NOTE 1 This includes not only research in library and information science (library research), but also all other research work of library staff.

NOTE 2 Monographs can be counted separately.

NOTE 3 Publications published in peer-reviewed journals can be counted separately.

### 7.5.3 Publications about the library

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

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

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

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

### 7.5.4 Preservation/conservation

#### 7.5.4.1 Items treated

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

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

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

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

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

#### 7.5.4.2 Appropriate storage

Define the storage space for the collection that offers an appropriate environment for long-term preservation in stable condition (in square metres).

“Appropriate environment” means adequate temperature, relative humidity (RH), light and air quality. The adequacy of temperature, RH, light and air quality for the long-term preservation of paper materials shall be defined by the ranges given in ISO 11799.

NOTE The total area available for materials storage is counted in [7.4.9.2](#).

### 7.5.5 Digitization

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

- a) digitized books (volumes);



- b) digitized serials (volumes);
- c) digitized manuscripts (physical units);
- d) digitized microforms (physical units);
- e) digitized cartographic documents (physical units);
- f) digitized printed music documents (titles or physical units, according to [7.3.6.1](#));
- g) digitized audiovisual documents (titles or physical units, according to [7.3.7.1](#));
- h) digitized graphic documents (physical units);
- i) other digitized documents (physical units, according to [7.3.10.1](#)).

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

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

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

NOTE 4 Digitized newspapers can be counted separately.

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

## **7.6 Funding and expenditure (during the reporting period)**

### **7.6.1 Operating (ordinary) expenditure**

#### **7.6.1.1 On employees**

The following should be counted:

- a) total amount of money spent on salaries and wages, allowances and other employee benefits, and other related expenditure. This includes all fringe benefits. If the cost of these is determined by percentage, the amount that percentage represents should be added.

NOTE 1 Separate figures can be given for professional staff, qualified specialist staff, other staff, and student assistants.

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

NOTE 2 The costs of the time that library staff spends on training or being trained are excluded.

#### **7.6.1.2 On acquisitions**

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

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

h) eBooks.

Costs of memberships, e.g. society memberships, consortia membership fees, etc. that provide access to specific materials for the collection (periodicals, proceedings, books, electronic resources, etc.) are included in a) to h) as appropriate.

NOTE 1 Subsets a) to d) can be amalgamated to give a sub-total for "print and other non-electronic material".

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

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

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

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

#### **7.6.1.3 On external document supply and interlibrary lending**

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

Pay-per-view costs paid by the library are included, but should be counted separately.

#### **7.6.1.4 On streaming services**

Count the costs of licenses for streaming services that the library offers to its users.

#### **7.6.1.5 On collection maintenance**

The following should be counted:

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

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

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

#### **7.6.1.6 On premises**

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

#### **7.6.1.7 On information technology**

Count the costs of computers, network (operations and maintenance), and telecommunication equipment, software and software licenses when paid for by the library.

#### **7.6.1.8 On open access publishing fees**

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

### 7.6.1.9 Miscellaneous

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

### 7.6.2 Capital expenditure

The following should be counted:

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

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

### 7.6.3 Income and funding

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

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

## 7.7 Library staff (at the end of the reporting period)

### 7.7.1 General

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

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

### 7.7.2 Total staff

#### 7.7.2.1 General

The following should be counted:

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

**NOTE** Volunteers are excluded.

#### 7.7.2.2 Professional staff

Count the number of professional staff members (FTE).

#### 7.7.2.3 Qualified specialist staff

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

#### 7.7.2.4 Other staff

Count the number of other staff members (FTE).

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

#### 7.7.2.5 Student assistants

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

#### 7.7.3 Volunteers

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

#### 7.7.4 Age groups of staff

Library staff can be subdivided as to age groups, e.g.:

- under 35;
- 35 to 44;
- 45 to 54;
- 55 to 64;
- 65 or older.

#### 7.7.5 Gender

Library staff can also be subdivided as to gender:

- female;
- male;
- other.

#### 7.7.6 Staff training

The following should be counted:

- a) number of attendance hours of staff members at formal staff training (during the reporting period);
- b) of those, hours at training for supporting target populations with special needs;

Alternatively, the number of staff training days may be counted.

NOTE 1 Full-day training is counted as one training day regardless of its duration.

NOTE 2 Training sessions of four hours or less are counted as half a training day.

NOTE 3 Staff time spent on user training is counted in [7.2.11](#) and [7.7.8](#).

b) number of staff who have received formal training (during the reporting period).

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

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

Count only the training that is paid by the employer (at least half) or where working hours can be used for the training.

### 7.7.7 Professional education

The following should be counted:

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

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

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

EXAMPLE If three persons have been educated during the whole year and three persons only for one month each, the total months would be  $36 + 3 = 39$ .

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

Total staff calculated in [7.7.2](#) can be allocated to the following main services of the library:

a) user services — includes the following functions: lending, reference and information, interlibrary lending, user training, reprography, shelving and retrieving items, services for special user groups;

b) media processing — includes acquisitions and cataloguing, licensing negotiations, technical book processing, binding;

c) digital services — includes planning, maintaining, providing and developing IT services and technically developing and improving the library's web-based services;

d) administration — includes management, planning and steering, budget control, staff management, statistics, marketing;

e) all other services — includes events and exhibitions, projects, conservation/preservation, digitization, etc.

The total of a), b), c), d) and e) should be equal to total staff as calculated in [7.7.2](#) (FTE).

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

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

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

b) Time logging: Choose a sampling period (normally one or two weeks) during which the service in question experiences average workload. Record the time, by work diaries, that staff members,

including members of other areas, spend on the service area in question. The sample counts are grossed up to FTE numbers for the reporting period.

## **7.7.9 Staff allocation to special services**

### **7.7.9.1 General**

In addition to the staff allocation to the main service areas as described in [7.7.6](#), the staff time that has been spent on a specified service during the reporting period can be assessed with the methods described above, preferably by time logging. The staff time spent for a specified service should then be calculated as percentage of total staff time as calculated in [7.7.2](#).

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

### **7.7.9.2 Staff time spent on cooperative projects**

This includes the following activities:

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

Staff time spent on international projects can be counted separately.

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

Ad hoc cooperation should be excluded.

### **7.7.9.3 Staff time spent on events**

This includes the following activities:

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

### **7.7.9.4 Staff time spent on preservation/conservation**

This includes the following activities:

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

- quality control; and
- statistics.

#### **7.7.9.5 Staff time spent on digitization of analogue materials**

This includes the following activities:

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

#### **7.7.9.6 Staff time spent on services for mobile devices**

This includes the following activities:

- planning;
- developing;
- formatting;
- maintaining.

#### **7.7.9.7 Staff time spent on social media**

This includes the following activities:

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

#### **7.7.9.8 Staff time spent on library evaluation**

This includes the following activities:

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

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

#### **7.7.9.9 Staff time spent on preparation of training lessons**

This includes the following activities:

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

These activities should be excluded from [7.2.11](#).

#### **7.7.9.10 Staff time spent on research support**

This includes the following activities:

- advice and support in managing information;
- publishing (all formats);
- bibliometrics;
- and research data management, support in applications for grants.

#### **7.7.10 Library staff in institutional committees**

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

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

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



## Annex A (informative)

### Recommended categories for further statistical analysis

#### A.1 General

In addition to the statistical measures and collecting procedures described in [Clause 7](#), this annex recommends categories for additional analysis. It is recognized that many of these categories are capable of subdivision according to local and/or national needs and this is to be encouraged. The categories in this annex are those recommended for the purposes of international comparisons.

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

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

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

###### A.2.1.1 Library users

###### A.2.1.1.1 Language

Library users can be subdivided as to their preferred language(s):

- a) the national language(s);
- b) all other languages.

Both a) and b) may be split up as to the different languages.

NOTE Users can have more than one preferred language.

###### A.2.1.1.2 Gender

Library users can also be subdivided as to gender:

- female;
- male;
- other.

###### A.2.1.1.3 Non-users

###### A.2.1.1.3.1 General

Many libraries have been established for serving a specific population. For public libraries, this is normally the population of the legal service area (authority). For libraries of an educational institution, it is the total of academic and professional staff plus students. For school libraries, it is the total of pupils and teachers. For resource planning as well as for reporting, it is vital for libraries to know the percentage of non-users in their population to be served and their reasons for not using the library.

#### A.2.1.1.3.2 Counting

The percentage of non-users in the population to be served of a specific library can be assessed by surveys. Draw a random sample from the population. Ask each person in the sample whether they have visited the library, or used the services of the library in other ways, during the last 12 months. Calculate the percentage of non-users in the population.

In addition, the reasons for non-use should be assessed. The questions can be:

What are your reasons for not visiting the library or using its online services?  
(Check more than one box, if applicable)

- 1) I have no time.
- 2) The library is hard to reach.
- 3) The opening times are not convenient for me.
- 4) I buy books and other materials myself.
- 5) I find my information in other ways, for instance on the Internet.
- 6) I am not interested in reading.
- 7) The rooms are unattractive.
- 8) I found the staff not helpful.
- 9) The fees are too high.
- 10) Other, please explain

#### A.2.1.1.4 Indirect users

##### A.2.1.1.4.1 General

Registered users sometimes use the library on behalf of other persons, for instance relatives, friends, colleagues. This can include lending or copying of materials, downloading items from the library's digital collection, or finding information for specific topics via library services. The number of active users can thus be higher than the counts described in [7.2.2.1](#) show, as those indirect users generally remain hidden and are counted as non-users.

##### A.2.1.1.4.2 Counting

The proportion of indirect users can be assessed by questioning registered users at the end of their physical or virtual visit.

The questions could be:

- Did you borrow materials (e.g. books, games, music) for another person (e.g. a child, a colleague) who is not registered as user by this library?
- Did you seek information on specific topics for another person (e.g. a child, a colleague) who is not registered as user by this library?

NOTE 1 The questions can be included in the surveys described in [A.2.1.7](#).

NOTE 2 Indirect users can come from outside the library's population to be served.

#### A.2.1.2 Other categories of loans

To analyse loans, use the categories specified for stock, additions and expenditure in [A.2.2](#).

The following categories can also be counted:

- a) number of short loans (less than three days, and included in loans in [7.2.3.1](#));
- b) number of physical units of material delivered regularly to organizations as a deposit for their members (not counted as loans in [7.2.3.1](#) because outside the definition in [3.2.29](#)); loans out of deposits are counted by the organization that registers the loan, i.e. that has received the deposit;
- c) number of loans to adults;
- d) number of loans to children.

### **A.2.1.3 Loans on specific days**

#### **A.2.1.3.1 Physical units on loan**

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

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

#### **A.2.1.3.2 Physical units in use within the library**

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

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

With some counting methods, the results might include items on ordinary and on-site loan being used in the library. These should be deducted to avoid double counting with [7.2.3.1](#).

#### **A.2.1.4 Reference questions**

Reference questions can be subdivided into the following:

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

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

#### **A.2.1.5 Informational questions**

Informational questions can be subdivided into the following:

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

#### **A.2.1.6 Duration of physical visits**

##### **A.2.1.6.1 General**

Physical library visits can be assessed as to their time duration.

The following methods can be used for assessing the visit time:

- counts by Infrared (IR) or similar detectors;
- checking the visitors' WiFi devices;
- counts via Bluetooth tracking;
- registration at entrance and exit;
- estimation via surveys.

Any of these methods may be used for one or more sample time periods and grossed up to give an annual estimate. The method used should be reported.

Where necessary, the count should be adjusted to deduct entrances and exits of library staff, and of any persons visiting other institutions or departments situated within the library building.

The data protection rules in the respective countries can affect the procedures.

#### **A.2.1.6.2 Counts via detectors**

The library entrance is equipped with Infrared (IR) or other sensors that are able to distinguish and detect incoming and outgoing persons. In the market for counters some devices have facilities that calculate an estimate of the average visitors' time spent in the library, the retention time. Other counters are without such a facility but collect data with a specified time resolution down to one hour for ingoing and outgoing traffic. In that case it is possible to estimate the average visitors' retention time.

#### **A.2.1.6.3 Counts via checking visitors' WiFi devices**

The method is applicable in libraries where the majority of users carry one or more activated mobile devices that connect to the WLAN of the library or the institution. By checking the log-ins and log-outs an average visit time can be calculated.

#### **A.2.1.6.4 Counts via Bluetooth tracking**

The method is based on the fact that the majority of mobile phones today is equipped with Bluetooth technology. Fixed gateways capture the signals of the specific Bluetooth devices, so that the position can be determined and an average visit time can be calculated.

#### **A.2.1.6.5 Counts via user registration at entries and exits**

Sometimes the library policy (or the institutional policy) demands registration for library visits. Users must register at the gate entrance with their library card, student card, etc.

If the registration includes both entries and exits, average visit times can be calculated.

#### **A.2.1.6.6 Estimation via exit surveys**

Visitors can be surveyed as to the visit time when leaving the library.

Example of questions:

How long did you stay in the library at this visit?

- less than 5 minutes;
- less than 1 hour;
- 1 - 2 hours;

- 2 hours or more;
- half a day;
- the whole day.

The question can also be put in a general survey, independent of a specific visit. In that case, the question would be:

How long do you stay in the library each time on average?

NOTE Usually the questions as to visit time will be put together with other questions concerning a library visit, e.g. activities during the visit.

## **A.2.1.7 User activities during library visits**

### **A.2.1.7.1 General**

Library visits, both physical and virtual, can be assessed as to the users' activities during the visit. The data can help libraries to adapt their services to their population.

### **A.2.1.7.2 Physical visits**

The following methods can be used for assessing user activities:

- a) surveys or interviews at the end of the visit;
- b) direct or indirect observation.

NOTE Usually the questions as to activities during a physical visit will be put together with other questions concerning the visit, e.g. visit time or satisfaction with the visit.

Surveys and interviews could ask the following questions:

What did you do during this library visit?  
(Check more than one box, if applicable)

- 1) borrow or return books, audio-visual material, or other library resources;
- 2) read books, newspapers, magazines etc. in the library;
- 3) use copying/scanning facilities;
- 4) study/work in the library;
- 5) listen to audio material, watch videos or films in the library;
- 6) use library computers;
- 7) use the Internet with my own mobile device (e.g. laptop, mobile phone, tablet);
- 8) work with my own books/materials;
- 9) take part in events/exhibitions (e.g. lectures, cinema shows, workshops);
- 10) attend training programmes;
- 11) meet friends;
- 12) turn to the staff for help, information or suggestions;
- 13) use the children's area together with children;
- 14) other (please describe).

NOTE Not all options are applicable to all libraries

If direct or indirect (open or covert) observation is used, the observer should try to check the observations in a similar list.

### **A.2.1.7.3 Virtual visits**

For assessing user activities during virtual visits, the following methods apply:

- a) online surveys offered when a user leaves the library website;
- b) observation via log analysis.

NOTE Usually the questions as to activities during a virtual visit will be put together with other questions concerning the visit, e.g. satisfaction with the visit.

A survey could ask the following questions:

Which library online services did you use during this visit?  
(Check more than one box, if applicable)

- 1) online catalogue;
- 2) electronic journals;
- 3) eBooks;
- 4) databases, digital repositories;
- 5) streaming services;
- 6) online reference;
- 7) information systems for specific subjects/disciplines or for library services;
- 8) training programmes, including library tours;
- 9) virtual events;
- 10) lending and interlibrary lending services;
- 11) check my account;
- 12) other (please describe).

Observation via log analysis should try to assess the same activities.

## **A.2.2 Collections and expenditure**

### **A.2.2.1 General**

The main text of this document subdivides as to types of resources. In addition, it is recommended that, both for analogue and digital collections, stock, additions and expenditure be subdivided as in [A.2.2.2](#) to [A.2.2.5](#).

### **A.2.2.2 Subject**

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

The titles, additions and withdrawals in the digital collection should be counted separately.

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

a) by topic:

- fiction;
- non-fiction;
- reference.

b) by target group (public libraries only):

- adult;
- children (up to and including age 13).

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

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

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

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

#### **A.2.2.3.1 Analogue collection**

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

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

The subdivisions above should, if chosen, be applied to stock, additions and expenditure.

#### **A.2.2.3.2 Digital collection**

Count the number of titles and additions by mode of acquisition:

- purchase;
- license;
- digitization from the analogue collection;
- legal deposit right.

The subdivisions above should, if chosen, be applied to stock, additions and expenditure.

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

For the analogue collection, count the number of physical units and/or titles added and/or the acquisition expenditure for:

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

#### **A.2.2.5 Language of document**

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

- materials in the national language(s);
- materials in all other languages.

The titles added, and/or the acquisition expenditure of the digital collection should be counted separately.

NOTE 1 If there are several national languages, the items in each language can be counted separately.

NOTE 2 “All other languages” can be separated into cultural groups. Minority languages can be counted separately.

#### **A.2.2.6 Cataloguing**

Count the number of catalogue records added during the reporting year (see [7.4.5](#)) by subsets:

- copy cataloguing (records bought or taken over from other sources);
- original cataloguing;
- retrospective cataloguing;
- subject cataloguing and/or adding a classification number.

### **A.3 Further categories**

#### **A.3.1 General**

Other aspects of collection and service can also be counted to reflect special types, tasks and/or stocks of libraries.



## **A.3.2 Doctoral dissertations and master's theses**

### **A.3.2.1 General**

This is mainly appropriate for libraries of an institution of higher education. Count only documents in the library's collection or documents in institutional repositories, if the library is involved in collecting the items and/or operating the repository.

### **A.3.2.2 Counting**

Count the number of titles and additions by format, separately for doctoral dissertations and master's theses:

- print;
- microform;
- digital form.

If a title has been acquired both in print and digital format, it should be counted as digital only.

NOTE Print and microform titles are still to be found in many collections, but the recent additions are for the most part in digital format.

## **A.3.3 Government documents**

Count the number of documents and additions by format:

- print;
- microform;
- digital form.

## **A.3.4 Rare materials collection**

Typically, count physical units and additions in these categories:

- a) rare books (published up to and including 1800);
- b) rare books (published after 1800);
- c) incunabula;
- d) manuscripts:
  - Latin script;
  - non-Latin script;
  - fragments and rolls;
  - autographs;
  - music manuscripts and autographs;
  - archives and records concerning private persons, institutions and organizations (collections containing manuscripts, letters, notes, photographs, and other material given by bequest to the library or purchased as such by, or on behalf of, the library).

NOTE 1 Illuminated manuscripts without text are assigned to Latin or non-Latin script according to their context of origin.

NOTE 2 In some countries/regions of the world, other categories can apply.

### A.3.5 Indexing

Count the number of records indexed for bibliographic services and databases.

The number of records produced for the national bibliography by the national library should be counted separately.

### A.3.6 Documents in digital preservation repositories

Count the contents of digital preservation repositories, if the library is involved in collecting the items and/or operating the repository.

The following should be counted as to the size of the repository:

- a) total size of the repository in gigabytes or terabytes;
- b) of that preserved locally in gigabytes or terabytes.

Systematic backups and redundancies should be excluded.

NOTE 1 If necessary, use an online byte converter to calculate your total in gigabytes.

Depending on the size of the repository, the counts may also be in bytes or terabytes.

The following should be counted as to the additions to the repository:

- a) size added to the repository during the reporting year in gigabytes;
- b) number of documents added to the repository during the reporting year;
- c) number of files added to the repository during the reporting year.

NOTE 2 The number of files includes all file types (i.e. xml, text, derivatives, logs, fixity, etc.) packed within the master preservation package.

The added documents can be subdivided into categories, e.g. books, dissertations, manuscripts, journal articles, audio documents, videos, emails, data sets, etc.

### A.3.7 Counting additions and withdrawals in merging library units

When merging library units:

- count the collections of the unit(s) to be closed down as removals;
- count additions of equal size on the collections of the new library unit (or on the unit to which the closing unit(s) will be merged).

EXAMPLE 1 Suppose there were three collections (Collection 1, 2 and 3) in the library in 2021. The collections 2 and 3 were merged during 2021 and a new collection 4 was established at the beginning of 2022. When the merging of units happens inside the library, the additions and withdrawals of original collections of the merging units overturn each other as shown in the following table:

	Collection 1		Collection 2		Collection 3		Collection 4		Library total	
	2021	2022	2021	2022	2021	2022	2021	2022	2021	2022
Beginning of the year	1 000	1 000	1 000	0	1 000	0	0	2 000	3 000	3 000
Additions							2 000		2 000	
Withdrawals			-1 000	0	-1 000	0	0		-2 000	
End of the year	1 000	1 000	0	0	0	0	2 000	2 000	3 000	3 000

### **A.3.8 Publishing by libraries**

Count the number of documents (titles) published by the library during the reporting period.

NOTE 1 The library is responsible for the complete publication of the document. Publishing activities are managed by the library itself or by a publishing service under the administration of the library. Co-editions are counted separately.

NOTE 2 Minor publications such as leaflets and brochures and occasional publications issued purely for commercial, business or intercompany purposes, for traffic purposes or private, domestic or social purposes are excluded.

NOTE 3 Documents can be published in analogue or digital format, or can be printed on demand.

NOTE 4 Documents where the library is only involved in collecting the items as well as in disseminating them by means of institutional repositories are counted in [7.3.17](#).

NOTE 5 Items from the analogue collection that have been digitized for preservation and dissemination purposes are counted in [7.5.5](#).

### **A.3.9 Services for schools and pre-schools**

#### **A.3.9.1 General**

Many public and academic libraries cooperate with local schools and pre-schools by offering educational services targeted at specific age groups or forms. The main aim is to promote the scope and usefulness of the library's resources and services to children and to further information literacy.

The services will usually be one-time activities or events, but can also stretch over some time such as a reference service for pupils when writing their papers.

NOTE 1 Services of public or academic libraries for school libraries are excluded.

NOTE 2 Regular delivery of materials to a school as a deposit is dealt with in [A.2.1.2](#).

Services provided for schools or pre-schools will vary according to need, but usually include the following:

- guided library tours;
- introductions into library use;
- training on materials and databases that are relevant for special classes or courses.

#### **A.3.9.2 Services**

The following should be counted:

- a) the number of activities or events that have been arranged by the library for schools or pre-schools during the reporting period;
- b) the number of attendances at the activities or events during the reporting period.

### **A.3.10 Services for researchers**

#### **A.3.10.1 General**

The main function of academic libraries has always been to cover the information needs of learning and research. Recently, with research activities and output becoming more and more digital, libraries offer new forms of support for researchers. Statistics for such services are in early stage of development, but in view of the growing importance of research support, a first set of possible data is described here.

Research support can vary according to the needs in the specific institution, but usually includes the following:

- managing information (e.g. information seeking and finding, citation management, alerting services);
- publishing, especially open access publishing and copyright questions;
- bibliometrics;
- research data management.

Many of these services are offered to every user of an academic library and have for a long time been counted in this document (see [7.2](#)), such as access to analogue or digital collections, lending and interlibrary lending, reference, photocopying, digitisation, and user training services. Statistics of such services include all types of users.

Special counts of research support activities are possible, where either the researcher's partner (e.g. the subject librarian) or the activity (e.g. archiving research data) allows to assume a case of research support.

#### **A.3.10.2 The services**

The following should be counted:

- a) number of interviews with subject librarians;

NOTE 1 It is assumed that interviews with subject librarians are generally related to research issues.

NOTE 2 The interview can be face-to-face, by telephone or virtual, and can cover one or more topics.

- b) number of copyright enquiries;

NOTE 3 The enquiries can be directed to reference or subject librarians.

NOTE 4 The enquiries are included in the total number of reference questions, but are counted separately here.

- c) staff time spent on research support (see [7.7.9.10](#));

- d) contents of institutional research data repositories (see [7.3.18](#)).

#### **A.3.11 Web archiving**

Since more than 20 years, institutions in many countries have taken up the task of selecting, capturing, storing, preserving and managing access to Internet resources over time. The task is generally performed by libraries or archives that are responsible for the legal deposit in a country.

The following core data are recommended as a minimum for yearly collection:

- a) number of URLs in the archive at the end of the reposting period;
- b) number of URLs added during the reporting period;
- c) number of gigabytes or terabytes
- d) number of visits to the archive;
- e) number of page views.

See ISO/TR 14873 for details of methods.

## Annex B (informative)

### Grossing up

#### B.1 General

This annex refers to the compilation of national statistics and other aggregated statistics. In order to maintain comparability between sets of statistics, and over time, data sets should be complete.

Where the actual data returns are unavoidably incomplete, it is necessary to supplement the actual returns with estimates that provide the best representation of the complete picture. This process is commonly called “grossing up”, and can ~~may~~ be achieved in one of several ways. Which method is used can depend on the statistics to be calculated and the completeness of the available data.

Three primary methodologies can be defined, as given in [B.2](#), [B.3](#) and [B.4](#).

#### B.2 Method 1: According to the population to be served

Calculate the ratio between the total populations to be served of those libraries supplying data and all libraries in the system, and apply this to the known data.

##### EXAMPLE

Suppose only 12 out of a total of 15 libraries have supplied data, but the user population to be served is known for all libraries.

If total population to be served for all 15 libraries = 200 000

and the total population to be served for those 12 libraries providing data = 150 000,

then the grossing up factor to be applied to the available data is:

$$\frac{200\,000}{150\,000} = 1,33$$

Round off to two decimal points.

If the total data supplied by 12 libraries = 300 000,

then the estimated total for all 15 libraries is:

$$1,33 \times 300\,000 = 399\,000$$

Exact values or rounding off to nearest hundred or thousand may be used as appropriate.

#### B.3 Method 2: Based on data of one or more previous years

Calculate the percentage change between last year and this year for those libraries supplying data in both years, and apply this to the figure for last year for those libraries not supplying data this year. This estimate should then be added to the known data for this year to obtain an estimate of the total for all libraries in the system.

Table B.1 shows calculations based on data of the previous year.

EXAMPLE Based on the data of the previous year, suppose out of a total of 15 libraries:

- 10 of the libraries supplied data in both 2020 (last year) and 2021 (this year),
  - three did not supply data in 2021, but did so in 2020, and
  - two supplied no data in 2020, but did so in 2021,
- then:

**Table B.1 — Calculations based on data of the previous year**

	Number of libraries (N=15)	Data available 2020	Data available 2021	Percentage change	Estimation for 2021	Total for 2021
data supplied in both years	10	200 000	220 000	$\frac{220\,000}{200\,000} = 1,10$	--	220 000
libraries with data in 2020 only	3	15 000	--	--	$15\,000 \times 1,10 = 16\,500$	16 500
libraries with data in 2021 only	2	--	30 000	--	--	30 000
<b>Estimate for all 15 libraries in 2021</b>						<b>266 500</b>

EXAMPLE 3 Based on time series

In general, the time series of observations can be expected to contain information that helps forecasting future observations. There are several developed statistical methods for evaluation of missing values. Here, only the evaluation of the end of the time series is addressed, the completeness of earlier data being the axiom.

One of the well-known methods to evaluate the end of a time series is Weighted Moving Average. Yet, used as such, it can distort the data of the time series by omitting part of the data. Instead, Exponential Smoothing improves on Weighted Moving Average by taking all previous observations into account, while still favouring the most recent observations. Depending whether a trend in the time series is observed, following types of Exponential Smoothing may be used:

- 1) Simple exponential smoothing for time series with no trend or seasonal variation
- 2) Double exponential smoothing (Holt's Linear Trend) for time series with trend but no seasonal variation
- 3) Triple exponential smoothing (Holt-Winters Multiplicative Method) for time series with both trend and seasonal variation

Spreadsheet programs such as Excel include statistical estimation tools that help to make more sophisticated estimations than the simple method of two previous years shown in example 2. It is also possible to download additional tools, not included in the standard package, making estimating and forecasting simpler for the user. Real Statistics for Excel is one of such convenient (and freely available) tools for data analysis in time series, and it can be integrated into Excel via the Add-in.

In Excel, methods shown in Table B.2 can be used.

**Table B.2 — Calculation with weighted moving average**

Method	Tool	Excel options
Moving Average	Data Analysis	Included
	RealStatistics *	Add-in
Weighted Moving Average	RealStatistics *	Add-in
	Solver	Included
Exponential Smoothing	Data Analysis	Included
	RealStatistics <sup>a</sup>	Add-in

<sup>a</sup> For more information, see Real Statistics Tool for Excel <https://www.real-statistics.com/> [visited 2022-02-14]

## B.4 Method 3: Based on other available data

An estimate for a missing variable may be made from data supplied for another variable.

### EXAMPLE 1

Staff costs (missing) may be estimated from staff numbers (supplied) by using an average cost per member of staff from other respondents.

When possible, full-time-equivalent (FTE) instead of headcount should be used.

### EXAMPLE 2

Suppose library A provided a figure of 1 000 books purchased during the year, but was not able to provide data on the related expenditure.

If the remaining libraries provided both figures, giving a total of 20 000 books purchased at a total cost of EUR 150 000, then:

Average cost per book:

$$\frac{EUR\ 150\ 000}{20\ 000} = EUR\ 7,50$$

Estimated spend by library A: 1 000 x EUR 7,50 = EUR 7 500

Estimated total expenditure for all libraries: EUR 150 000 + EUR 7 500 = EUR 157 500

## B.5 Variations

Variables other than the population to be served may be used as weights in Method 1, and can be more appropriate in some circumstances. As a last resort, and if no other options are possible, the number of libraries may be used (i.e. a ratio of 15/12 in Example 1 of [B.2](#)).

The calculations can be carried out separately for sets of libraries in different categories (typically by size) with the results then accumulated for the sector.

A combination of these methods may be used as appropriate.

Special procedures can be called for where missing data are concentrated in untypical libraries. Such “untypical” libraries can, for example, be university libraries catering only for postgraduate students or film libraries with relatively small collections of printed material.

The extent of estimation should be indicated in the published statistics with a note to explain the procedure(s) adopted.

## Annex C (informative)

### Methods and problems of measuring digital usage

#### C.1 General

Libraries have since a long time tried to measure the use of their digital or partly digital services. When in traditional services processes were changed from manual to electronic routines, the first step was to collect the same statistics as before. A typical example is the lending service, where the traditional processes are increasingly performed via electronic means, but statistics have basically not changed.

But the new possibilities of collecting, combining and analysing data allow for more and varied statistics. While for analogue catalogues usage had to be assessed by observation or surveying, user behaviour on digital catalogues can be evaluated in detail as to time and device, search topic and search strategy, success and failure.

In recent years, libraries have tested and accepted new ways of offering their services. They have digitized their collections, adapted existing services for mobile devices or promoted services via social networks. As all that is labour- and cost-intensive, solid statistics are needed for proving the intensity of usage and thereby the interest in the services.

#### C.2 Possible statistics of digital services usage

##### C.2.1 Statistics of usage

The following aspects can be assessed:

- 1) Frequency of use: This concerns all digital services and collections, including the library's website and the accounts on social media. Frequency can be measured by the number of visits, page Impressions, downloads, or searches.
- 2) Point of use (date, time of day, etc.): This is relevant for all digital services where additional staff resources might be needed in times of high use.
- 3) Visit duration: The duration of a visit can show whether the user found interesting information. The duration can, however, be influenced by a user's skills in searching.
- 4) Access path (referrer): Users can take various paths for accessing digital library services, e.g. via the website of the library's institution, via digital catalogues, following links in social media, etc. For deciding how and where the services should be promoted to users, it is relevant to know the access ways that users prefer.
- 5) Devices used: Usage can start from different devices. Beside personal computers and laptops more and more mobile devices are used such as tablets and mobile phones. For mobile devices the services generally have to be specially formatted.
- 6) Modes of searching: Use of digital services often starts with a search, e.g. for specific documents or for information to a specific topic. Libraries generally offer different modes of searching on their websites, in online catalogues or databases, e.g. basic or advanced search, truncation of search terms, Boolean operators, proximity searching, or restricting the search to subject categories such as medicine or literature. Knowing how often such options are used can help the library to promote them in user training or by help functions.



## **C.2.2 Statistics of users**

The following aspects can be assessed:

- 1) Membership of the primary user group: When libraries have been set up to serve a defined population (members of an institution or commercial firm, inhabitants of a certain region or community), they should know how far this population uses their services. Some services might also be restricted to the primary user group or to a part of it.
- 2) Geographical provenance: It is relevant for libraries to know whether usage comes out of their own region, or whether their services are interesting to a wider clientele.
- 3) Categorization as to subject areas: Especially for institutions of higher education, it will be interesting to know to which faculty the users are belonging.
- 4) Differentiation as to age, educational level or profession: This additional information can be relevant for adapting services to the users.

For assessing the forenamed aspects, data collection is not restricted to technical measuring, but should include methods such as surveying and observation.

## **C.3 Sources of data**

### **C.3.1 Data from the library's own or cooperative integrated systems**

The local or cooperative library IT-systems generally deliver data for circulation and ILL statistics, catalogue use and downloads of content items (see [7.2](#)).

### **C.3.2 Data from other sources of the library or its institution**

Online reference is generally evaluated via cooperative reference systems.

Internet accesses by users inside the library via WLAN of the library or the institution are generally assessed by the system administrator.

### **C.3.3 Data from external institutions**

Statistics for the use of digital documents that a library has purchased or licensed for its users are generally delivered by the provider, if the documents are stored on the provider's server.

For assessing the use of accounts on social networks, libraries are dependent on the statistics pools of the networks.

### **C.3.4 Data obtained by surveys or observation**

#### **C.3.4.1 General**

A number of interesting and useful data cannot be obtained by technical measuring, but must be totally or partly collected by methods such as surveying or observation. This concerns especially aspects such as types, behaviour and success of users.

#### **C.3.4.2 Surveys**

Surveys are often offered as web surveys. They can be either connected to a specific case of use, being offered before or after it, or they can ask for long-term experience of the user. Participation should be voluntary, with the option to opt-in or opt-out.

The survey can ask for

- frequency of use;
- geographic provenance of the user;
- subject field of the user;
- profession;
- purpose of the search;
- search strategy;
- access path of the search (referrer);
- device used;
- success of the search.

It might also be interesting to ask whether the user has attended training for the use of online services.

**NOTE** The advantage of asking for the user's experience in one specific case of use is, that the answers can be compared with the results of technical measuring of the same case.

#### **C.3.4.3 Observation**

Observation of digital use is usually carried out by log file analysis. It is especially useful for showing the search strategy, e.g. following the click path through a website.

Observation is deemed more objective than surveying, as users do not rate their own activities. In covert observation, where users don not know they are observed, a largely normal behaviour can be expected.

### **C.4 Technical methods**

#### **C.4.1 Log file analysis**

Web servers record many of their transactions in a log file. Analysis of such log files yields statistics about the use of a website or a web server. The units of measure are generally page impressions (page views) and visits. In order to avoid counting requests from search engines and robots, log analysis tracks visits by cookies and ignores requests from known spiders.

Log analysis can reveal details of visits such as:

- provenance of users (domain names);
- date and time of the transaction;
- duration of the visit;
- referred pages and pages visited;
- wording of search questions;
- number of searches;
- number of downloads;
- operating system statistics.

The method is time-saving, as the files are automatically available, and unobtrusive. But the statistics are not very detailed, and users cannot be clearly identified.

Caching can impair the results. If a user has already visited a page, the second request will often be retrieved from the browser's cache, and so no request will be received by the web server and counted in the statistics.

#### **C.4.2 Page tagging**

Page tagging is currently the most-used method in web analytics. It requires that a tag (usually a JavaScript Code) is implemented in the HTML code of each webpage. When the webpage is opened, information about the website and the visitor is passed along with the JavaScript. This information can then be processed remotely, and extensive statistics can be generated.

Page tagging can reveal substantially more details than log file analysis. A univocal client ID can be identified. Besides counting the page impressions (and therewith the visits), the following aspects can be assessed:

- date and time of the transaction;
- geolocation of the user (abbreviated IP-address);
- number of clients;
- browser statistics;
- time spent on each coded page;
- access path (referrer);
- device statistics.
- operating system statistics

Unlike logfile analysis, page tagging is not biased by caching.

#### **C.5 Problems of measuring digital usage**

With new techniques developed mainly for commercial reasons, nearly unlimited data collection seems possible. But for a number of services libraries are restricted to the data provided by vendors or social platforms. And in any case of personal data, data protection regulations have to be considered.

## Annex D (informative)

### Alphabetical index

The index lists the definitions of [Clause 3](#) and the counting procedures described in [Clause 7](#) and [Annex A](#).

academic library	<a href="#">3.1.1</a> , <a href="#">7.1.2.2</a>
access <physical>	<a href="#">3.2.2</a>
access <virtual>	<a href="#">3.2.1</a>
access rights	<a href="#">3.3.1</a>
acquisition	<a href="#">3.3.2</a> , <a href="#">A.2.2.3</a>
active borrower	<a href="#">3.2.3</a> , <a href="#">7.2.2.1</a>
active user	<a href="#">3.2.4</a> , <a href="#">7.2.2.1</a>
addition	<a href="#">3.3.2</a> , <a href="#">7.3</a>
administrative unit	<a href="#">3.1.2</a> , <a href="#">7.1.1</a>
appropriate storage	<a href="#">7.5.4.2</a>
archives	<a href="#">A.3.4</a>
audiovisual document	<a href="#">3.3.3</a> , <a href="#">7.3.7</a>
blog	<a href="#">3.2.5</a>
book	<a href="#">3.3.4</a> , <a href="#">7.3.2</a>
born digital document	<a href="#">3.3.5</a>
branch library	<a href="#">3.1.3</a> , <a href="#">7.1.1 c)</a>
browser	<a href="#">3.2.6</a>
caching	<a href="#">3.2.7</a>
capital expenditure	<a href="#">3.6.1</a> , <a href="#">7.6.2</a>
cartographic document	<a href="#">3.3.6</a> , <a href="#">7.3.5</a>
catalogue records	<a href="#">7.4.5</a> , <a href="#">A.2.2.6</a>
CD-ROM	<a href="#">3.3.7</a>
central library	<a href="#">3.1.4</a> , <a href="#">7.1.1 b)</a>
client	<a href="#">3.2.8</a>
closed stacks	<a href="#">3.4.1</a>
collection	see library collection, <a href="#">3.3.31</a>
commercial publication	<a href="#">3.3.8</a>
compact disc read-only memory	see CD-ROM, <a href="#">3.3.7</a>
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1) Cancelled and replaced by ISO 5127:2017.



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