

APPENDIX 1

PROJECT HISTORY

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The work plan structure for the project was established as follows:

- WP1 - Set up the database and test the web site.
- WP2 - Demonstrate the web site and up-date the survey data.
- WP3 - Report preliminary finding and report progress.
- WP4 - Update the database and undertake Millennium Study.
- WP5 - Maintain the database.

Work has proceeded with only occasional delays and within budget.

The first task [WP1]

This was planned for June - September 1998 and achieved on time: it was to make available on the web information about the project and data derived mainly from previous studies undertaken for the Commission. The previous studies were *Library Economics in Europe: An Update 1981-90* [1995, ISBN 92 826 9197 7], covering Western Europe, and *Library Economics in Central and Eastern Europe* [1997, ISBN 92 828 1562 5] which contained data for 1988-1995. **Deliverables** relevant to this task included the following:

- A - Setting up the web site.
- B - Contacts list of people/organisations from which data would be obtained.
- C - Specification for the statistical database.
- D - Specification for the textual part of the database.
- E - Baseline report on historic data.

The **web site** [www.libecon2000.org, set up August 1998] is of great importance: the material provided is ideal for web publishing for the several reasons. The source material is often obscure and unknown outside its country and sector of origin so that researchers, policy makers and other users cannot easily obtain it. It is often available only in the original language which makes it inaccessible for many users. It needs to be as up to date as possible. It needs to be formulated to a common standard and free of errors. It needs to be grossed up in appropriate cases to produce valid trend lines. For financial data, currencies need to be standardised to allow comparisons between countries and over time. Producers and users of the data are relatively few and far between and benefit from contacts with each other which the web site facilitates.

The **contacts** list is being constantly updated as changes occur and the updated version is on the web site. In each country we tried to identify a *national co-ordinator* to act as our primary point of contact in that country, a methodology which we have used successfully in previous studies. Often the national co-ordinator is in a co-ordinating organisation for libraries [e.g. Denmark], a national focal point [e.g. Ireland, Belgium], a national library [e.g. Romania, Estonia] or a responsible ministry [e.g. Iceland, Luxembourg]. In most countries we have national co-ordinators, many of whom we know personally.

In some countries we have to deal with more than one organisation. In addition to co-ordinating and facilitating the supply of information, the country contacts are also asked to assist in quality control by clarifying queries, correcting errors identified or suspected in their data and verifying the data before input to the Libecon2000 database. They have also been asked to supply contributions to newsletters, to supply bibliographies of relevant publications and to report on relevant developments. In most countries this has worked well. In some cases personal visits have been required, and more personal contact would have been beneficial to encourage active participation in the work.

The **specification for the statistical database** was relatively straightforward in view of the experience gained on the two previous projects. Some additional variables (or lines on the questionnaire) were introduced in an attempt to keep up with technological change - and a raft of extra ratios was added - both for data checking and for their intrinsic value. In the interest of uniformity the same questions were addressed to all library sectors even though some were not inapplicable in some sectors.

Historic data, collected for the two previous reports, was loaded onto the new web site - EU & EFTA from 1981 - 1990 and CEC 1988 - 1995. The EU and EFTA data were extrapolated forward to 1995 and the Central and Eastern European data backwards to 1981. Financial data were initially quoted at 1990 prices. All data in the database are clearly labelled according to whether they were supplied as a result of the questionnaire or estimated. Because the same questionnaire, based on ISO2789, had been used for both studies, the data are consistent and comparable. These historic data also line up with the Libecon2000 data (1991 - 98) subsequently collected because the changes to the questionnaire involving some additional questions do not impact on aggregations.

The second task [WP2]

This was to update the web site with new data covering the years 1991-1997 [Western Europe] and 1994 or 95-1997 [Eastern Europe]. This involved agreeing a **questionnaire format** in consultation with other stakeholders and based [for continuity] on the format used for the previous studies. The questionnaire [which is available for inspection on the web site] was agreed and despatched in September 1998.

Receipt and validation of data extended over a longer period and involved very much more work than had been forecast. Many queries were resolved by e-mail and/or by fax. Problems varied greatly across countries and across sectors. There were language difficulties in some places, but - on the whole - problems in cajoling data providers on the international scale were little different from those experienced inside a country. In general the more nationally centralised the library organisation the easier it has been.

Visits have been made to Denmark, Italy, France and Greece to clarify matters and solicit co-operation. As these tasks have developed so personal contacts have been established: this, and nurturing genuine interest in the statistical comparisons is a most important aspect of the project overall.

Deliverables relevant to this work package were:

- **F - Report on the database** updated with 1991 - 1997 data. In the event this was delayed from December 1998 until April 1999 in order to receive and show a major part of the new data. It was said at the time that it was not unusual to encounter such problems at this stage. At an early stage it became apparent that it would be necessary to devote more resources to the chasing of the survey response. This task was re-assigned to the Czech National Library and IPF, leaving LISU the capacity to validate the response.

Not all country contacts were able to devote the time to completing the standard questionnaires. In such instances, we have collated the statistics ourselves from published sources, and asked the relevant country contacts to verify our interpretation.

- **G - Newsletter** This Newsletter [No 1] was produced in both a high quality printed format [2000 printed] and in electronic form. It was circulated at the IFLA Conference in August 1998 at Amsterdam and at other relevant professional meetings subsequently.

The third task [WP3]

This was to report and to review progress as a continuation of WP2. There was some overlap. The deliverables relevant to this work package included:

- - Updated list of country contacts [available on the web site].
- - Presenting preliminary findings to the IFLA conference in 1998.
- - Second survey launched in April 1999 requesting 1998 data. The response has clearly benefited from the momentum established in the earlier 'chase-up' period.

The fourth task [WP4]

While the LIBECON web site continues to be the main medium for dissemination this phase incorporated more particular publicity initiatives:

- An invited paper [“LIBECON 2000 and the Future of International Library Statistics”] was presented at the IFLA conference in Bangkok in August 1999 at the invitation of the IFLA Statistics Section [subsequently published in the IFLA Journal]. The second newsletter and fact sheet were distributed at this event.
- An article about LIBECON2000 has been published in “Managing Library Finances”, MCB University Press.
- The development of ancillary activities, such as statistical benchmarking, demonstrates a growing awareness of gaining more value from the statistical archives. A workshop was held in Estonia 14-16th July to discuss the use of statistical performance indicators and benchmarks. A fully working prototype financial benchmarking tool has been developed for individual libraries in Estonia. This model can be adapted for use in other countries. A report, with extensive reference to LibEcon appeared in Estonia [Raamattukogu 4/99 p.37-38].
- A poster session was held 15-20th August 1999 at the 3^d Northumbria International Conference on Performance Measurement in Libraries & Information Services, where Newsletter 2 and the fact sheet were also distributed.
- The fact sheet was included in the conference packs at the high level public library conference “Something for Everyone” held in Copenhagen 14-15th October 1999.

The continuing work in progress seeks to roll forward the time series to report on library activities during 1998. The extended database has been “grossed-up” to help in the interpretation of results. Emphasis has been placed on establishing emerging trends and steps taken to strengthen the commitment of data contributors by promoting the LibEcon concept. Auditing initial results, resolving further queries and modifications to grossing formulae have proceeded in preparing this Millennium Report and making refinements to the web site.

Discussions with UNESCO have taken place, with a longer term aim to extend the co-operation over survey management. Data have been transferred to UNESCO for incorporation in the United Nations Statistical Yearbook. The experience gathered in the LibEcon surveys provides a valuable test bed to inform debate within ISO committees on the proposed revisions to the international standard.