

## **LIBRARY OPERATIONS & USE - OVERALL SUMMARY**



## **Chapter 3 Library Operations & Use - Overall Summary**

In this chapter we concentrate on operational features - leaving the financial data to be summarised in chapter 4. The reasons for this are partly technical in that the 'physical' data are more complete than the financial and do not incur the problems of currency conversion and inflation that beset the financial aspects. There are also institutional and accounting problems in compiling financial statistics that are genuinely comparable. (Common examples are whether or not libraries are charged for the cost of premises and staff overheads - which may often be absorbed by the parent institution.) So, for these various reasons, the statistics of operational features are more robust and comparable.

The first section of this chapter identifies overall TRENDS.

The second section gives a summary, or 'bird's eye view', of the position revealed in the 1998 statistics: this emphasises the 'all sectors together' view, as each sector will be treated in detail in chapters 5 - 9.

### **TRENDS**

#### **Staff**

We estimate that about 374,000 staff were employed in libraries, an increase of 3.7 % since 1991. This increase in staffing numbers is weighted towards the professional staff whose numbers increased by 4.9 % over the period. The increase in Trained staff occurs mostly in EU States.

The number of trained librarians in all sectors of libraries (206,000) is higher than previous estimates for the mid-1990's (175,800 for 1991). However, the number of other support staff is substantially lower than previous estimates. Proportionately the returns for 'Other Staff' are appreciably lower in the CEE than in the EU.

**Table 3.1 Staff FTE \* (thousands)**

	<i>Qualified</i>	<i>Other</i>	<i>Total</i>
1991	196	165	361
1992	195	163	357
1993	191	164	355
1994	195	163	357
1995	199	162	361
1996	201	159	360
1997	206	160	367
1998	206	168	374

\* Full Time Equivalent, i.e. part time staff count as fractions in proportion to hours worked.

### Materials

The overall position and trends are summarised in this table:

**Table 3.2. Trends in Materials Provision (millions)**

RESOURCES	<i>1991</i>	<i>1998</i>	<i>% change</i>
Book stock	2,778.0	2,944.0	6
Audio Visual stock	104.0	127.0	22
Periodical subscriptions	19.5	21.3	9
Manuscripts	29.5	32.0	8
Microforms	316.0	313.0	-1
ANNUAL MOVEMENTS:			
Book Additions	171.0	171.0	=
A/V Additions	9.7	12.1	25
Inter Library Loans (received)	15.2	29.0	91

The trends in annual additions to stock appear to vary between sectors. National libraries report a growth in their annual additions in books and audio-visual materials. Public libraries book acquisitions fell between 1991 - 1995 but have since stabilised, while their audio-visual materials have increased steadily. With a large increase in the population served by Tertiary Education, so have their book acquisitions grown hugely: but there has been a decline in audio visual additions.

Current periodical subscriptions in the tertiary sector have remained surprisingly constant during the period 1991 to 1998. The largest number of subscriptions are in special libraries. The statistics show that holdings of Manuscripts and Microforms continue to be significant.

Inter Library Lending has almost doubled: much of this is concentrated in the activity of national libraries - particularly the large scale operations in the UK and Germany - but it is also important in the smaller states.

## Use and users

The count of **Registered Members** increased in total from 126 million to 139 million - an increase of 10.5 per cent. As this count includes those who use several libraries the proportion it represents out of the total population (484 million) - 29 per cent - is disappointingly low. But the trend is moving upwards.

Estimates for **Loan Transactions** at 3,543 million and **Visits** at 3,468 million are close and show only a small difference in trend: + 5.2 % against - 1.3 %.

When taken together the ratio for **Loan Transactions per Registered Member** point to high intensity of use - moving from 26.8 to 25.5.

## Modernisation

Several questions were introduced into the survey in order to assess aspects of service development and automation. The response to these was generally poor, though better in the CEE states than elsewhere. Typically they are not yet found in established statistical series. It will take some time before the efforts of LIBECON 2000, ISO and IFLA rectify this position, but a valuable start has been made and the information compiled here is invaluable in pointing to important trends.

These matters are discussed later and in some detail in chapters 5 - 9. Overall total estimates show the following:

**Workstations for users** increased more than fourfold from 74,000 in 1991 to 310,000 in 1998. The stock of **CD ROMs** went up exponentially during the second half of the period, going from an estimated 456,000 in 1991 to 2,500,000 in 1998. These developments are well publicised in the profession and will come as little surprise.

Less well known are two aspects relating to the automation of traditional materials and services. The **Percentage of Catalogue Records Automated** is estimated to have gone up from 36 to 46 per cent while the **Percentage of Stock on Open Access** increased only from 60 to 61 per cent. These figures show some progress but also point to a large deficit of automation development still required to update services and operations.

## Service points

Including all sectors, it is estimated that in 1998 there were 224,000 service points throughout the study area. There has been a considerable contraction since 1991, averaging 7.1 %, but this has taken place particularly in the Central & Eastern European countries (CEE) where the proportionate drop was 14 % and where the main closures took place in public libraries. This is considered further in chapter 7 - where more detailed analysis shows that in some countries the population served in small service points may be below the level at which a modern library service can be effectively delivered.

## THE IMPORTANCE OF THE LIBRARY SECTORS

One would expect, even over a lengthy period, to find little change in the relative size of the various library sectors. Estimates in previous surveys showed that, between 1981 and 1995 public libraries and higher education libraries increased their share of total spending on libraries - with the share of other sectors largely unchanged.

In this survey we find a very different result - as illustrated in this table:

**Table 3.3 Library sector shares**

SECTOR	<i>by total expenditure</i>		<i>by total staff</i>	
	PREVIOUS ESTIMATE		PRESENT ESTIMATE	
	<i>1981</i> *	<i>1995</i> §	<i>1998</i>	<i>1998</i>
National	6.0%	5.9%	5.4%	4.1%
Higher Education	15.3%	16.9%	19.9%	16.5%
Public	47.3%	49.5%	45.0%	45.2%
Special	8.6%	8.6%	21.3%	16.7%
Other Major	4.9%	4.5%	0.8%	2.2%
School	17.8%	14.7%	7.7%	15.5%

\* EU States only § estimated from *The Historic Libecon Database*.

The main reason for these changes is the new methodologies adopted to evaluate the size of the Special Library sector. This springs from two separate initiatives.

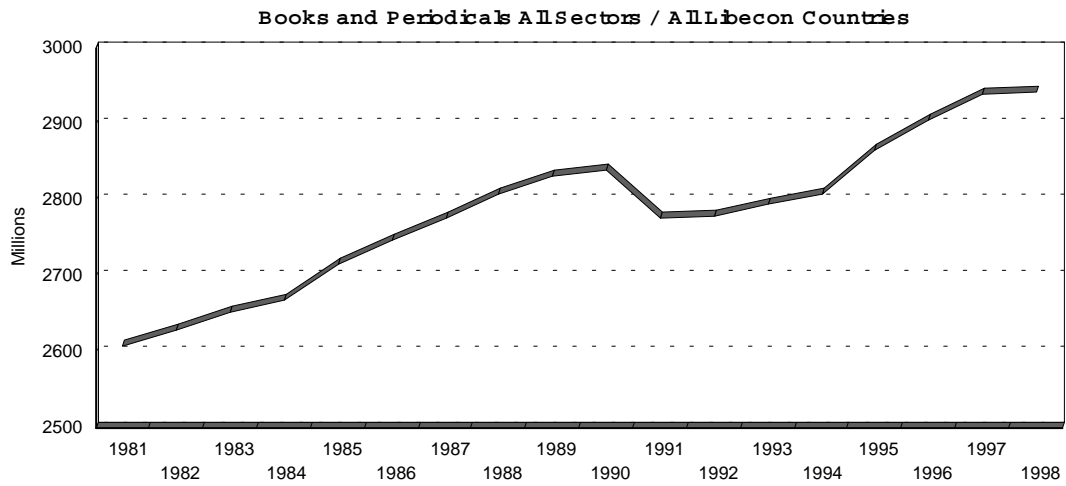
First, there has been substantial research activity (chiefly but not exclusively in the UK and Germany) to apply statistical sampling techniques. As a result, what many had always suspected has been demonstrated - namely that the various types of library designated under the Special Library label are very much more numerous than had previously assumed in the absence of any systematic statistical evidence. These new estimates are still subject to error which could be substantial – but the work has been conscientiously done.

Second, the exercise launched in connection with the revision of ISO 2789 has already had an effect on these statistics in that many countries (but by no means all) have gone along with the LIBECON suggestion to return libraries in the Miscellaneous sub category under Special Libraries rather than under ‘Other Major’. The sub division of Special Libraries into sub categories has also prompted in some countries more analytical estimates. These matters are discussed in more detail in chapter 9.

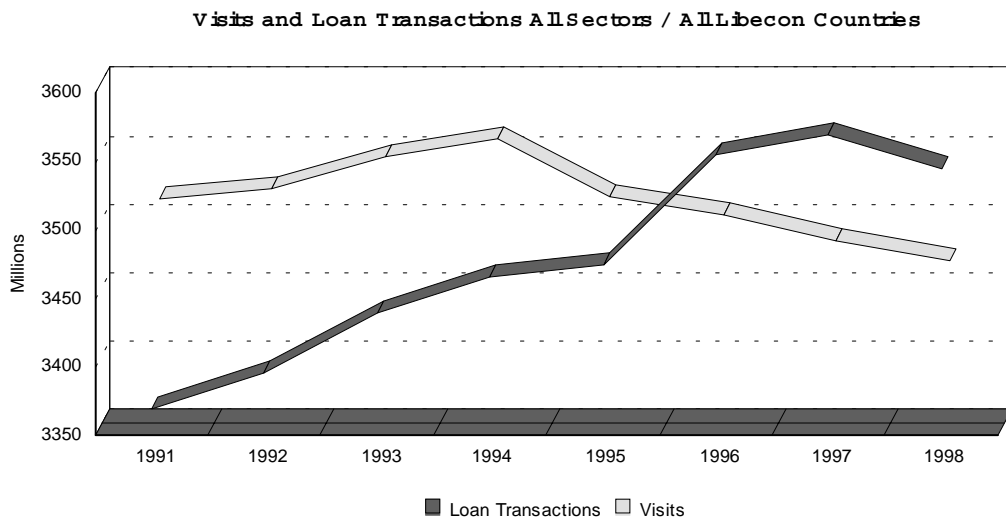
In view of this major change Table 3.3 above also includes a column to show how different the sector proportions appear when analysed by the numbers of staff employed rather than by expenditure. (The high proportions for School and Other sectors are influenced by some unusually high returns on staffing from Poland - which may be exaggerated.) Other ways of assessing the relative importance of different sectors are covered in the second part of this chapter.

## DIAGRAMS / ILLUSTRATIONS

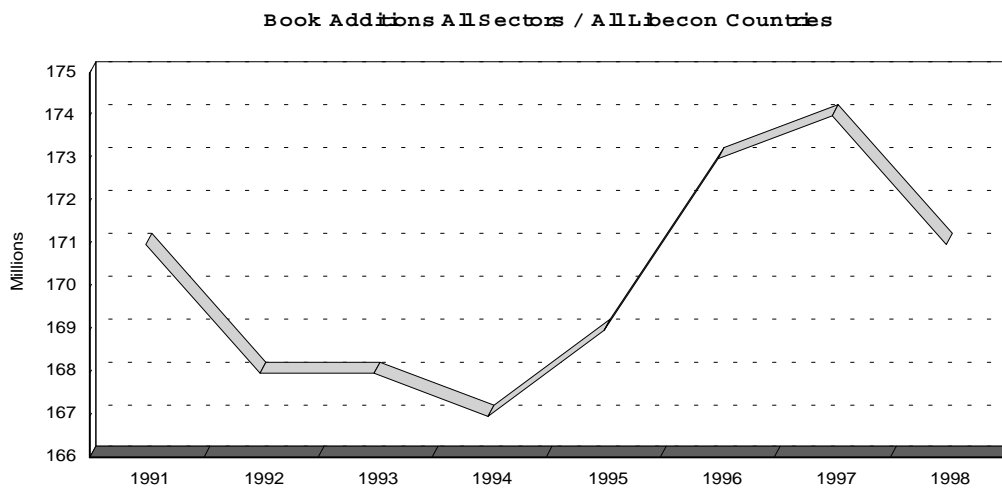
**Figure 3.1**



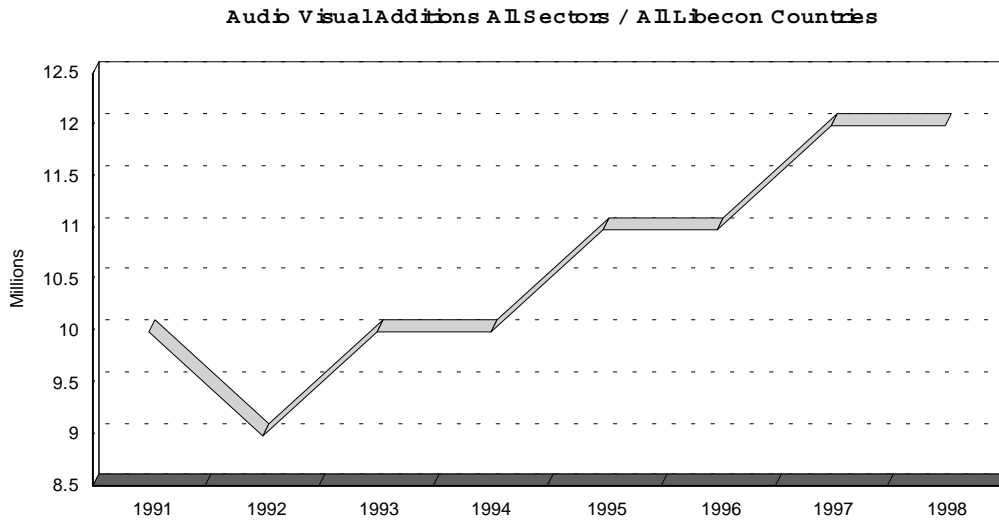
**Figure 3.2**



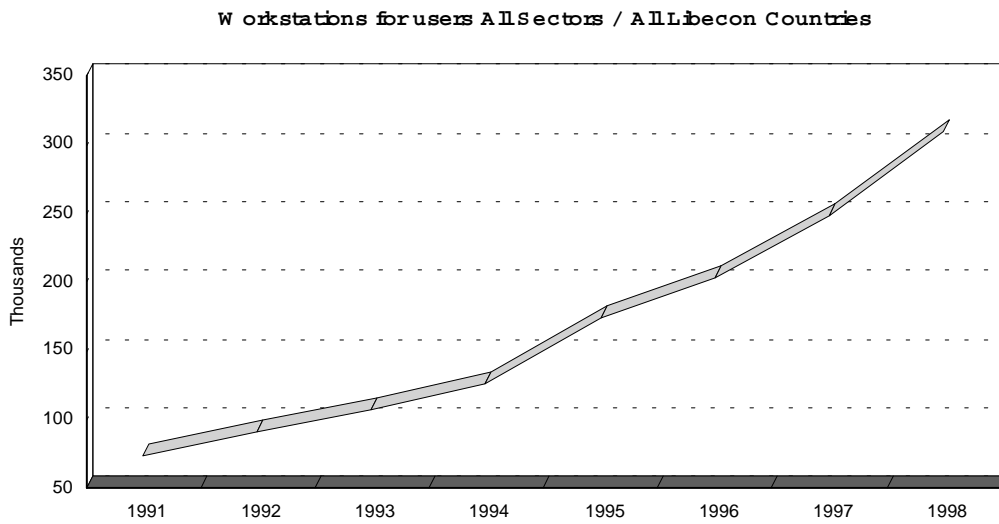
**Figure 3.3**



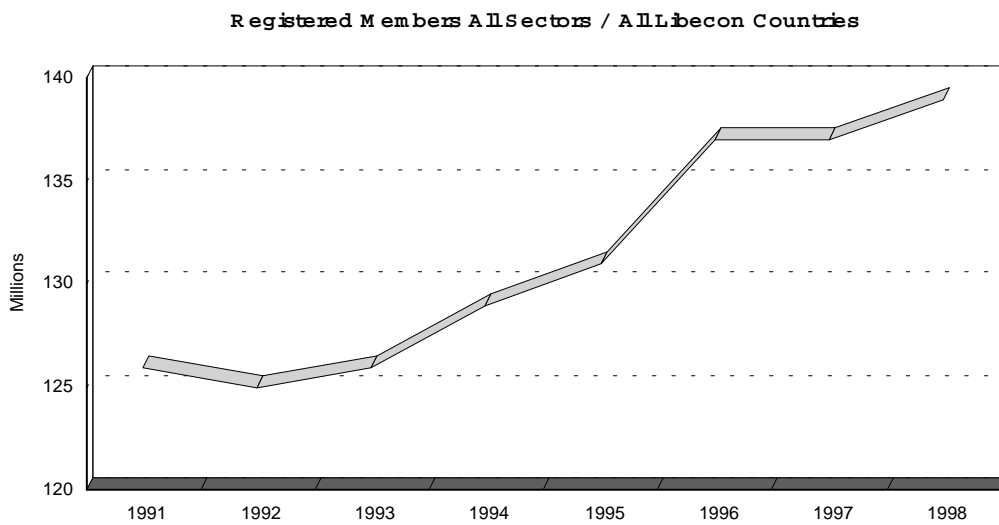
**Figure 3.4**



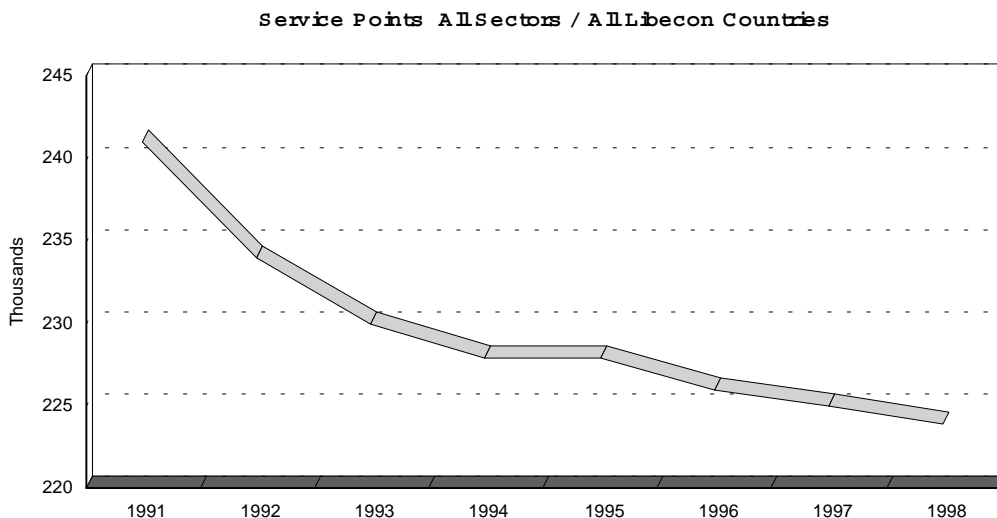
**Figure 3.5**



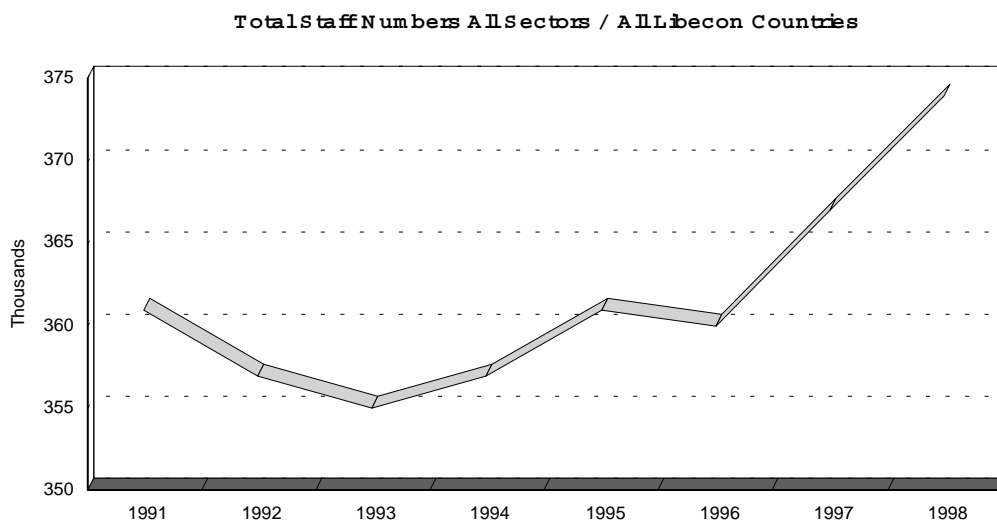
**Figure 3.6**



**Figure 3.7**



**Figure 3.8**



Please note that the left hand scale in each of the above charts is scaled to describe the trend shown. For this reason there is no comparability between each chart, and the actual movement that is displayed in each may appear exaggerated.

## COUNTRIES AND SECTORS

We now move from consideration of Trends to look at the relative strengths of countries and sectors. The LIBECON 2000 data are well suited for this. The analysis is intended to serve several purposes:

- to point to the size and stage of development of library services in different countries;
- to point to the relative importance of sectors within each country;
- to point to the features that distinguish each sector from the others;
- to show the relative importance of sectors in more detail than in the previous section;
- to suggest possible bench marking exercises;
- to give practical examples to demonstrate the 'grossing' methodology;
- to allow the reader to evaluate conclusions and the quality of grossed up totals according to the number of responses and non responses in relation to each feature: for example, information on Staff Numbers is fully provided for Public and Tertiary libraries, but it is sparse for Special and School libraries;
- to show in summary form the gaps in data not provided.

For this purpose we present 'Cross Sector Total' tables for the main resource and use features - for the year 1998. More of these in this format are included on the website database - although for many purposes the greater detail presented in chapters 5 - 9 will be appropriate.

The tables shown here mainly give absolute data uncorrected for size of country (population) and their value lies partly in emphasising the differences between large and small states. Each table consists first of the 1998 data entered onto the database for each country. Three dots (...) show that we have no information provided for that feature in that country. The next section contains the grossed up estimates for All States and for regions and geographical areas. The 'Response %' gives the proportion of the All States grossed up figure that is represented by actual data. Finally percentages are calculated to show, for this feature, the relative strength of each sector overall.

## **Staff numbers**

Table 3.5 contains, in a comparative sense, very complete data. It is particularly pleasing to see so many estimates for the Special Library sector – which give rise to an estimate of 16.7 % of all staff employed in Special Libraries.

In contrast the estimates for Schools libraries continue to be sparse – and the high figure for Poland is derived from a special survey conducted as long ago as 1991. Almost certainly this has distorted the grossing up estimating so that the sector proportion of 15.5 % may prove to be an exaggeration. But the difficulty of obtaining data on Schools libraries has long been UNESCO experience and this gap needs urgent rectification in Europe as in other parts of the world.

Complete data for all sectors have been provided by Estonia, Lithuania, Poland, Denmark and the UK. (The absence of positive data from most of them for the ‘Other’ sector does not indicate incompleteness, rather compliance with the intention of the survey.)

Note: In all these tables there is a line to show data provided in actual responses and the percentage this represents of the total estimate. For example, in Table 3.5 National Libraries reported 13,580 staff: this was 89 per cent of the 15,235 estimated total. This total included estimates for Slovenia, France, Iceland, Liechtenstein and Luxembourg.

## **Book Additions**

Statistics of Book stock and acquisitions are traditionally the other most popular series in countries’ statistics - and Table 3.6 demonstrates their anticipated completeness. Here there are more data from Schools and less from Special libraries. Of course these data give only the numbers of items acquired and take no account of value. For that purpose the reader is referred to Table 4.2 in the next chapter. There the financial figures for Tertiary and Special libraries give much higher proportions - in line with very much higher unit prices paid per unit acquired.

The low figure for National Libraries will be influenced in some cases by the exclusion of legal deposit acquisitions from this count.

## **Loan Transactions**

Again the data in Table 3.7 is relatively complete. This is the measure by which Public library activity is most commonly assessed - and the suggested comparisons with Schools libraries are interesting. The low proportion for Special Libraries corresponds with ways in which they are typically used and is not surprising. The low figure for the Tertiary sector is probably not a good indicator of use: typically they have heavy use of material on the premises - which, when taken from open shelves, is frequently not included in the statistics of transactions. Ways to overcome this weakness are being actively explored in many places - not least in the context of the revision to ISO 2789.

Table 3.8 ‘Loan Transactions per member of Staff’ provides an indication of productivity.

**Table 3.5**                    **TOTAL STAFF (FTEs)**

	<b>National</b>	<b>Tertiary</b>	<b>Public</b>	<b>Special</b>	<b>Other</b>	<b>School</b>	<b>1998 Total</b>
Bulgaria	329	...	...	...	...	...	...
Czech Republic	444	608	4,344	...	0	...	...
Estonia	525	498	1,466	157	130	534	...
Hungary	540	960	3,881	875	...	...	...
Latvia	448	330	1,900	194	100	...	...
Lithuania	618	646	4,116	435	152	1,855	...
Poland	907	6,601	17,828	4,063	1,338	26,000	...
Romania	351	...	5,014	...	0	...	...
Slovak Rep	349	493	1,927	...	...	105	...
Slovenia	...	372	775	243	0	780	...
Austria	308	941	1,588	...	...	...	...
Belgium	200	710	3,940	...	...	...	...
Denmark	316	894	5,199	390	0	1,160	...
Ireland	68	750	1,300	350	0	...	...
Finland	180	1,103	4,193	250	...	...	...
France	...	3,884	20,545	...	...	...	...
Greece	486	...	1,834	57	...	...	...
Iceland	...	...	...	...	0	44	...
Italy	595	...	...	...	...	...	...
Liechtenstein	...	...	...	...	0	...	...
Luxembourg	...	...	...	...	0	...	...
Netherlands	250	1,870	...	2,890	0	...	...
Norway	341	901	1,901	443	0	...	...
Portugal	317	941	1,449	1,281	91	...	...
Spain	520	4,600	5,500	3,170	1,470	...	...
Sweden	291	1,567	5,228	328	...	...	...
Switzerland	103	...	...	...	0	...	...
UK	2,903	13,000	25,829	18,000	0	5,200	...
Germany	2,190	9,266	18,900	6,375	...	...	...
All States	15,235	61,848	169,169	62,668	7,509	57,934	374,363
CEE	4,595	15,058	44,865	10,365	4,188	46,416	125,488
EU	10,184	44,401	119,091	51,124	3,321	10,796	238,917
EFTA	456	2,389	5,213	1,178	0	722	9,958
Northern Europe	1,139	4,518	16,701	1,438	440	4,431	28,667
Central Europe	7,583	31,901	80,114	38,460	880	6,038	164,977
Southern Europe	1,918	10,370	27,489	12,404	2,001	1,049	55,231
Baltic States	1,591	1,474	7,482	786	382	2,875	14,591
Eastern Europe	3,004	13,584	37,383	9,579	3,806	43,541	110,897
Response total	13,580	50,934	138,658	39,502	3,281	35,678	281,633
Response %	89	82	82	63	44	62	75
Sector proportions	4.1	16.5	45.2	16.7	2	15.5	100

Table 3.6

## BOOK ADDITIONS 000s

	National	Tertiary	Public	Special	Other	School	1998 Total
Bulgaria	45	103	251	59	133	175	
Czech Republic	72	246	1,816	...	0	562	
Estonia	38	99	544	28	27	180	
Hungary	26	...	...	...	...	...	
Latvia	25	79	445	1,208	46	...	
Lithuania	75	220	969	52	46	753	
Poland	...	1,843	3,794	343	188	5,401	
Romania	16	...	984	...	0	...	
Slovak Republic	45	95	356	...	...	199	
Slovenia	...	110	366	98	0	239	
Austria	48	457	...	...	...	...	
Belgium	50	393	1,602	...	...	...	
Denmark	56	242	2,242	124	0	1,246	
Ireland	22	261	650	...	0	...	
Finland	34	436	1,569	206	...	...	
France	...	1,041	6,206	...	...	...	
Greece	74	...	278	9	...	...	
Iceland	...	...	80	...	0	32	
Italy	...	2,778	...	...	...	...	
Liechtenstein	...	...	...	...	0	...	
Luxembourg	...	...	...	...	0	...	
Netherlands	...	...	...	...	0	...	
Norway	105	339	936	108	0	445	
Portugal	33	296	528	195	49	352	
Spain	199	1,228	1,836	737	308	...	
Sweden	92	560	1,858	54	...	...	
Switzerland	33	...	...	...	0	...	
UK	308	2,906	10,980	4,300	0	9,404	
Germany	795	3,718	...	1,288	...	...	
All States	3,327	20,519	62,703	15,310	1,518	67,765	171,142
CEE	553	4,210	10,542	3,344	516	11,174	30,339
EU	2,633	15,413	49,625	11,681	1,002	55,402	135,756
EFTA	141	896	2,536	285	0	1,189	5,047
Northern Europe	290	1,596	6,686	499	38	3,812	12,921
Central Europe	1,766	10,016	35,050	8,694	423	35,739	91,688
Southern Europe	719	4,697	10,424	2,774	541	17,040	36,195
Baltic States	138	397	1,958	1,288	119	1,182	5,082
Eastern Europe	414	3,813	8,585	2,056	397	9,991	25,256
Response total	2,191	17,447	38,292	8,808	798	18,987	86,523
Response %	66	85	61	58	53	28	51
Sector proportions	1.9	12	36.6	8.9	0.9	39.6	99.9

Table 3.7

## LOAN TRANSACTIONS

(000s)

	National	Tertiary	Public	Special	Other	School	1998 Total
Bulgaria	11	5,282	16,197	1,662	4,857	6,877	
Czech Republic	201	2,034	62,003	...	0	...	
Estonia	37	1,651	15,352	1,295	490	4,444	
Hungary	...	1,788	36,724	435	...	8,548	
Latvia	244	3,050	17,902	847	2,174	...	
Lithuania	36	6,813	21,991	2,016	20	9,690	
Poland	132	11,597	189,035	17,705	3,309	87,044	
Romania	1,090	...	37,893	...	0	...	
Slovak Republic	5	2,498	25,800	...	...	1,777	
Slovenia	...	3,565	15,600	471	0	5,768	
Austria	345	3,643	16,066	...	...	...	
Belgium	248	1,293	68,475	...	...	...	
Denmark	...	4,789	75,514	586	0	29,151	
Ireland	...	3,049	12,485	...	0	9,203	
Finland	8	7,637	100,332	510	...	...	
France	...	12,266	280,197	...	...	...	
Greece	484	...	1,829	57	...	...	
Iceland	...	...	2,000	...	0	441	
Italy	1,081	5,556	...	...	...	...	
Liechtenstein	...	...	...	...	0	...	
Luxembourg	...	...	...	...	0	...	
Netherlands	...	...	...	...	0	...	
Norway	...	3,051	19,029	604	0	4,443	
Portugal	423	1,468	1,681	1,531	2	773	
Spain	...	13,817	21,417	3,714	5,356	...	
Sweden	151	5,305	80,479	469	...	17,000	
Switzerland	...	...	...	...	0	...	
UK	5,781	79,742	497,889	10,000	0	90,819	
Germany	...	...	324,555	5,552	...	...	
All States	21,154	254,227	2,337,545	78,137	27,747	824,577	3,543,387
CEE	1,984	50,511	438,496	38,660	12,715	186,244	728,610
EU	18,711	195,643	1,846,583	37,880	15,032	626,148	2,739,997
EFTA	458	8,073	52,467	1,597	0	12,185	74,780
Northern Europe	605	20,966	277,355	2,205	569	59,689	361,389
Central Europe	14,584	156,902	1,306,743	26,026	6,340	389,244	1,899,839
Southern Europe	3,981	25,848	314,952	11,246	8,123	189,400	553,550
Baltic States	317	11,514	55,244	4,159	2,684	18,291	92,209
Eastern Europe	1,668	38,997	383,251	34,502	10,031	167,953	636,402
Response total	10,277	179,894	1,940,445	47,454	16,208	275,978	2,470,256
Response %	49	71	83	61	58	33	70
Sector proportions	0.6	7.2	66.0	2.2	0.8	23.3	100.1

Table 3.8

## LOAN TRANSACTIONS PER MEMBER OF STAFF

	National	Tertiary	Public	Special	Other	School	1998 Total
Bulgaria	35	...	...	...	...	...	...
Czech Republic	452	3,346	14,274	...	...	...	...
Estonia	70	3,313	10,469	8,230	3,769	8,320	...
Hungary	...	1,863	9,462	498	...	...	...
Latvia	545	9,242	9,422	4,368	21,740	...	...
Lithuania	58	10,547	5,343	4,635	133	5,224	...
Poland	146	1,757	10,603	4,358	2,473	3,348	...
Romania	3,106	...	7,557	...	...	...	...
Slovak Republic	14	5,067	13,388	...	...	16,924	...
Slovenia	...	9,584	20,129	1,938	...	7,395	...
Austria	1,119	3,873	10,116	...	...	...	...
Belgium	1,239	1,821	17,379	...	...	...	...
Denmark	...	5,357	14,524	1,503	...	25,130	...
Ireland	...	4,065	9,604	...	...	...	...
Finland	44	6,927	23,929	2,040	...	...	...
France	...	3,158	13,638	...	...	...	...
Greece	996	...	997	996	...	...	...
Iceland	...	...	...	...	...	10,071	...
Italy	1,817	...	...	...	...	...	...
Liechtenstein	...	...	...	...	...	...	...
Luxembourg	...	...	...	...	...	...	...
Netherlands	...	...	...	...	...	...	...
Norway	...	3,387	10,008	1,362	...	...	...
Portugal	1,335	1,560	1,160	1,195	22	...	...
Spain	...	3,004	3,894	1,172	3,644	...	...
Sweden	518	3,386	15,394	1,431	...	...	...
Switzerland	...	...	...	...	...	...	...
UK	1,991	6,134	19,276	556	...	17,465	...
Germany	...	...	17,172	871	...	...	...
All States	1,389	4,111	13,818	1,247	3,695	14,233	38,492
CEE	432	3,354	9,774	3,730	3,036	4,012	24,338
EU	1,837	4,406	15,506	741	4,526	57,998	85,015
EFTA	1,006	3,380	10,064	1,356	...	16,882	32,687
Northern Europe	531	4,640	16,607	1,533	1,292	13,471	38,076
Central Europe	1,923	4,918	16,311	677	7,205	64,466	95,500
Southern Europe	2,076	2,493	11,457	907	4,060	180,553	201,545
Baltic States	199	7,810	7,383	5,288	7,027	6,362	34,069
Eastern Europe	555	2,871	10,252	3,602	2,636	3,857	23,773
Response total	**	**	**	**	**	**	**
Response %	**	**	**	**	**	**	**
Sector proportions	3.6	10.7	35.9	3.2	9.6	37.0	100.0

