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Information and documentation — Determination of price indexes for print and electronic media purchased by libraries

Information et documentation — Détermination des indices de prix pour les documents imprimés et électroniques acquis par les bibliothèques



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Foreword

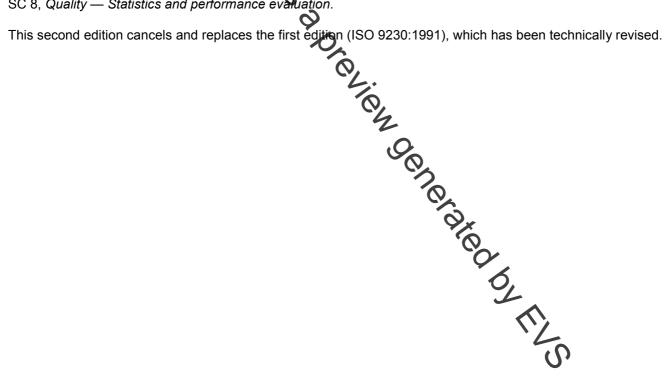
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ISO 9230 was prepared by Technical Committee ISO/TC 46, Information and documentation, Subcommittee SC 8, Quality — Statistics and performance evaluation.



Introduction

The intention of this International Standard is to provide the international library community with a methodology for establishing national price indexes for the documents they acquire. This second edition has been expanded to cover electronic as well as printed books and serials, and electronic databases.

A problem well known to libraries is the difficulty of controlling the amount of funding made available annually for acquisitions.

If libraries generally acquired documents, in one physical medium, solely from national sources, and had stable budgets, the problems of budget control for library documents would be simple. This is, however, not the situation. Libraries new have to cope with information of a greater variety than before, and from international sources. These developments in the information world are accompanied by general economic developments that seem to create reductions and instability in library budgets.

Under such circumstances the management grows, and with it the demand for tools for library management. Use of price indexes is, of course, only one element in library management practice, but one which is nevertheless necessary for relevant budget control. National price indexes are not only needed for funding but also for negotiation with vendors and publishers.

Price indexes do not relate only to national origin but to materials of both national and international origin used by libraries. It is not intended that price indexes constructed according to this methodology should in any way replace general consumer price indexes or specific indexes set up by the trade. However, indexes can normally be regarded as accurate only within a specific environment. The experience that led to the preparation of this International Standard was the difficulty in applying indexes of non-library origin to library management.

It is easy to understand the difficulties of reporting prices when one takes into consideration the international background of most library and information work, which can involve many countries and currencies.

This International Standard is intended to be, therefore, an accepted tool for library management.

It has been necessary to apply certain limitations to this International Standard.

Though libraries in most countries still spend the majority of their majority cal resources on print media (books and journals), there is a growing collection of electronic documents that can be more important for use. The priority between these groups can differ from library to library, but they are dealt with together in this International Standard. Increasingly, libraries are acquiring large electronic collections, and one of the key reasons for revision of this International Standard was to incorporate methoderogies appropriate to a range of digital documents. This International Standard therefore covers books and series in both print and electronic forms, and databases. It was decided to continue to exclude from this International Standard criteria which could be used for price indexes for other types of physical media. This International Standard does not ignore the need to deal with these other physical media. They have, however, been excluded in order to bring this work to a conclusion.

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In the future, when more experience is gained, any revision of, or addition to, this International Standard could include other physical media.

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Information and documentation — Determination of price indexes for print and electronic media purchased by libraries

1 Scope

This International Standard specifies a method for the determination of price indexes relating to the prices of print and electronic media acquired by libraries. It is not meant for calculating a price index of the national media production. The media included are restricted to books, serials and databases.

NOTE Further details are given in 2.2 and 3.1.

It is intended primarily for use by the library community, although it is accepted that other organizations may also find it useful. It focuses on compiling price indexes on the base of national and international sources, relevant to one country or region and different types of libraries. Different indexes will be appropriate to different types of library, according to the types of material in their collections. This International Standard presents a methodology allowing for a general index which could be calculated from subsets of data, and could be weighted according to local needs. It introduces sampling methods for the selection of materials on which to base calculations.

Note that this International Standard describes indexes of prices, not of costs. Local cost indexes can be compiled instead of price indexes where there is insufficient uniformity of pricing structures to permit the calculation of price indexes, or as an additional too for libraries. Guidelines for the calculation of local cost indexes are given in Annex B.

2 Terms and definitions

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

NOTE The equivalent English or French terms, as appropriate, have seer given in Annex C.

2.1

access rights

rights for reaching or using the library collection

NOTE For the electronic collection, this implies that the library has secured permanent or temporary access for its users by law, license or other contractual and/or cooperative agreement.

[ISO 2789:2006, definition 3.2.2]

2.2

audiovisual document

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

NOTE This includes audio documents such as records, tapes, cassettes, audio compact discs, files of digital audio recordings; visual documents such as slides, transparencies, and combined audiovisual documents such as motion pictures, video recordings, etc. Microforms are excluded.

[ISO 2789:2006, definition 3.2.4]