
**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*



PDF disclaimer

This PDF file may contain embedded typefaces. In accordance with Adobe's licensing policy, this file may be printed or viewed but shall not be edited unless the typefaces which are embedded are licensed to and installed on the computer performing the editing. In downloading this file, parties accept therein the responsibility of not infringing Adobe's licensing policy. The ISO Central Secretariat accepts no liability in this area.

Adobe is a trademark of Adobe Systems Incorporated.

Details of the software products used to create this PDF file can be found in the General Info relative to the file; the PDF-creation parameters were optimized for printing. Every care has been taken to ensure that the file is suitable for use by ISO member bodies. In the unlikely event that a problem relating to it is found, please inform the Central Secretariat at the address given below.

This document is a preview generated by EVS



COPYRIGHT PROTECTED DOCUMENT

© ISO 2007

All rights reserved. Unless otherwise specified, no part of this publication may be reproduced or utilized in any form or by any means, electronic or mechanical, including photocopying and microfilm, without permission in writing from either ISO at the address below or ISO's member body in the country of the requester.

ISO copyright office
Case postale 56 • CH-1211 Geneva 20
Tel. + 41 22 749 01 11
Fax + 41 22 749 09 47
E-mail copyright@iso.org
Web www.iso.org

Published in Switzerland

Contents

Page

| | |
|--|----|
| Foreword..... | iv |
| Introduction | v |
| 1 Scope | 1 |
| 2 Terms and definitions..... | 1 |
| 3 Presentation | 5 |
| 3.1 General..... | 5 |
| 3.2 Preferred presentation | 6 |
| 3.3 Geographical coverage | 6 |
| 4 Structure of price | 6 |
| 4.1 General..... | 6 |
| 4.2 Price differences | 6 |
| 4.3 Prices for books | 7 |
| 4.4 Prices for serials | 7 |
| 4.5 Prices for databases | 8 |
| 5 Price indexes for books | 9 |
| 5.1 General..... | 9 |
| 5.2 Books not included in the index | 9 |
| 5.3 Categories for the index | 10 |
| 5.4 Sources for collection of prices | 10 |
| 5.5 Methods of compilation..... | 10 |
| 5.6 Reporting of indexes | 11 |
| 6 Price indexes for serials | 11 |
| 6.1 General..... | 11 |
| 6.2 Serials included in the index | 11 |
| 6.3 Serials not included in the index..... | 12 |
| 6.4 Sources for the collection of prices..... | 12 |
| 6.5 Methods of compilation..... | 12 |
| 6.6 Reporting of indexes | 13 |
| 7 Price indexes for databases | 13 |
| 7.1 General..... | 13 |
| 7.2 Databases included in the index | 13 |
| 7.3 Databases not included in the index | 14 |
| 7.4 Sources for the collection of prices..... | 14 |
| 7.5 Methods of compilation..... | 14 |
| 7.6 Reporting of indexes | 15 |
| Annex A (informative) Subject classification | 16 |
| Annex B (informative) Guidelines for local cost indexes..... | 19 |
| Annex C (normative) List of equivalent terms..... | 21 |
| Bibliography | 22 |

Foreword

ISO (the International Organization for Standardization) is a worldwide federation of national standards bodies (ISO member bodies). The work of preparing International Standards is normally carried out through ISO technical committees. Each member body interested in a subject for which a technical committee has been established has the right to be represented on that committee. International organizations, governmental and non-governmental, in liaison with ISO, also take part in the work. ISO collaborates closely with the International Electrotechnical Commission (IEC) on all matters of electrotechnical standardization.

International Standards are drafted in accordance with the rules given in the ISO/IEC Directives, Part 2.

The main task of technical committees is to prepare International Standards. Draft International Standards adopted by the technical committees are circulated to the member bodies for voting. Publication as an International Standard requires approval by at least 75 % of the member bodies casting a vote.

Attention is drawn to the possibility that some of the elements of this document may be the subject of patent rights. ISO shall not be held responsible for identifying any or all such patent rights.

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

This second edition cancels and replaces the first edition (ISO 9230:1991), which has been technically revised.

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 now 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 demand for effective library 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 production, 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 financial 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 methodologies appropriate to a range of digital documents. This International Standard therefore covers books and serials 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.

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

This document is a preview generated by EVS

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 tool 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 been 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]