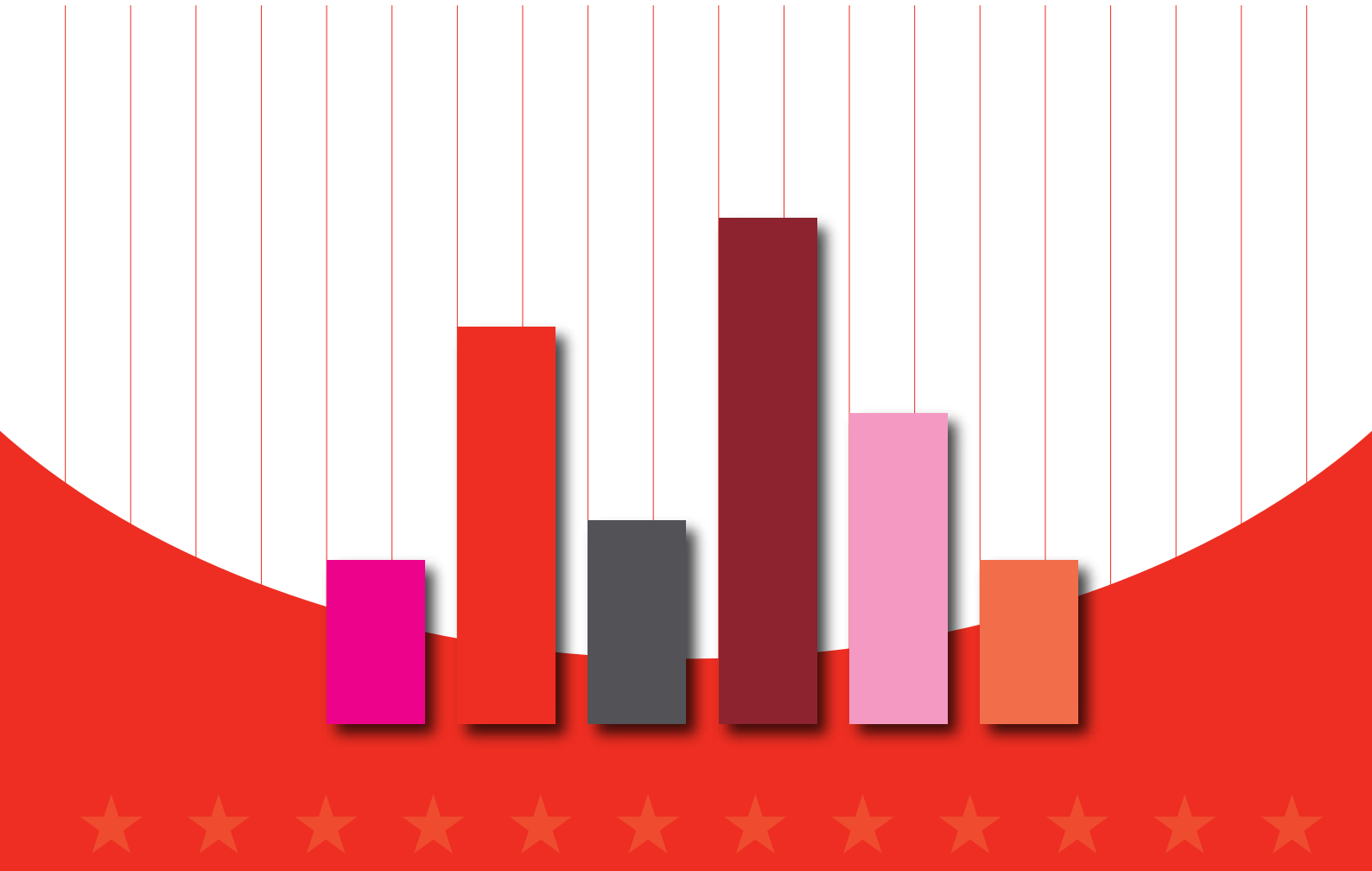
Association des Directeurs & personnels de direction des Bibliothèques Universitaires et de la Documentation

Study of European indicators

The situation of French university libraries compared with other European countries



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1. Context and objectives of the study

1.1.Context

With the support of the DISTRD[1] of the French Ministry for Higher Education, Research and Innovation (MESRI), the Association of Directors of University Libraries (ADBU) launched a study on indicators for European university libraries.

1.2.Objectives

- Continue the long-standing commitment of the ADBU and the MESRI to evaluating the effectiveness of French university libraries in an international, particularly European, framework.
- Rely on European partners for data collection (with SCONUL, LIBER, EBLIDA and IFLA).
- Propose a set of official indicators common to several European countries that are at once consistent, well-defined, up-to-date and updatable, freely accessible and widely disseminable.
- Carry out the first comprehensive study of its kind (in terms of numbers of countries targeted).
- Position the situation of French university libraries in relation to other European countries.
- Contribute to reflections on advancing and implementing policies designed to improve the situation of French university libraries.

2. The initial scope of the study

- Compare the French situation with European countries with established indicators at a national level: Spain, United Kingdom, Germany, the Netherlands, Finland, Switzerland (with the possibility of extending this list to other countries if data are readily available).
- Draw comparisons by consolidating data at the country level and, where available, at the institution level (e.g. France, Spain, United Kingdom, Germany).
- Conduct the study over a period of 4 years (2013 to 2016) using a methodology allowing for annual data updates for sustained reflections based on evolving situations.
- Define the indicators by building on previous reflections put forth by the ADBU on indicators common to several international benchmarks and previous proposals issued by the MESRI (provided in the annexes under the study specifications).
- Integrate data and produce indicators presented in a spreadsheet format, while at the same time proposing solutions aimed at fluid integration and processing of data, and effective dissemination and exploitation of both data and indicators.

3. The final scope of the study

3.1. The 13 countries

This study is based on data collected from the following 13 countries:

	Population 2016
Germany	82 175 684
France	66 759 950
United Kingdom	65 382 556
Spain	46 440 099
Netherlands	16 979 120
Hungary	9 830 485
Austria	8 690 076
Switzerland	8 327 126
Denmark	5 707 251
Finland	5 487 308
Norway	5 213 985
Ireland	4 724 720
Estonia	1 315 944
Total	**327 036 320**

(1) *Department of scientific and technical information and the information network*

3.2. Notes on the collected data

- A detailed presentation of data sources by country is provided in Annex 3 of the report.
- Data from Sweden were collected (10 million) but have not yet been translated into English or French and, therefore, are not included in this study.
- Several additional countries with large populations were contacted to participate in the study but did not respond: Italy (60 million), Poland (38 million), Romania (20 million), Belgium (11 million).
- All data used in this study were accessed online with the exception of two countries which provided data directly:
  - for France, data was provided by DISRTD, pending the overhaul of the ASIBU data access system,
  - for the United Kingdom and Ireland, data was provided by SCONUL (Society of College, National and University Libraries).
- Data for Canada (research libraries through the CARL Association and Quebec university libraries) were also collected but not used, as priority was given to European countries.
- All data were collected in XLS file format, except for the Netherlands , for which data were extracted from annual reports in pdf format.
- The collected data include institutional data, except for the Netherlands, Norway and Estonia, where data consolidation was only possible at the country level.
- Data from institutions in each country were consolidated to calculate totals and averages of country level data; for some data, however, only averages per institution were considered significant, which could not be applied at the national level (e.g. opening hours, titles of digital journals and books).
- All data were collected over a four-year period (2013-2016), except for the Netherlands and Denmark whose data for 2016 were not available at the time of this study (the request for data from the Netherlands is currently being processed). Data dating back before 2013 are available for most of the countries included in this study.
- The data collected are for all calendar years, except for two countries where data pertained to the academic year only. For these cases, the second semester year was used to align the data with the calendar year (e.g. 2015-2016 => 2016).
  - The United Kingdom and Ireland,
  - France: student data (SISE) and teacher-researchers data (GESUP),
- Library and student data for France and Switzerland came from different sources; for these cases, an additional step of data reconciliation was necessary to establish data consistency for those institutions present in both library and student data sets (such as for France where only the institutions common to the ESGBU and the SISE file were considered).
- In several cases, we were unable to access data on the number of students enrolled in specific universities (Hungary, Denmark, Estonia), which effectively prevented us from calculating indicators for these countries based on the number of students. To do this would require continuing the study, bearing in mind that in this case, the difficulty will lie in reconciling data for those institutions present in two different files (cf. above).
- Financial data for the United Kingdom, Switzerland, Norway and Hungary have been converted into euros (December 2017 exchange rates).

4. Common data

4.1. Developing the common data set

Data collected from the different countries cover over 200 data components.
Of these 200 data components, approximately 30 data components were selected for meeting two essential criteria:
• they were identified as priorities by the study working group, and
• they are common to a significant number of countries (at least 4 or 5).

Indeed, only 4 of these data components were identified as being common to all countries:
• Library staffing expenditure,
• Total library material expenditure,
• Library staff (FTE),
• Loans of printed books (excluding extensions).

Library data were reported as a priority when:
• they allowed for the calculation of priority indicators, as identified below,
• they were based on a definition established by the International Standard ISO2789 (Information and Documentation – International Library Statistics), which was consistently the case (see Annex 1), with the exception of data related to consultation of electronic articles and books, in which case COUNTER definitions were given preference.

Data were considered as non-priority, or as data to be discarded, for several possible reasons:
• they did not have a priority indicator (e.g. interlibrary loan data),
• they did not exist in France,
• they were not common to a sufficient number of countries,
• their measurement was based on imprecise definitions or their consistency between countries could not be guaranteed.

Data relating to print collections have (unfortunately) been discarded due to difficulties involved in consolidating data across countries for the following reasons:
• they could not be characterized by the same levels of consolidation, by types and subtypes of collections,
• did not consistently guarantee coverage of collection completeness (data on “all print collections” is not always available),
• could not be measured consistently across titles, physical units or linear meters.

4.2. Common data

NB: Additional non-priority data are included in the list below for exploratory purposes.

Context
- D0. Country population

Potential library end users
- D1. Students enrolled in the Institution
- D2. Teacher-researchers and academic staff of the Institution

Library use
- D3. Loans of printed books (excluding extensions)
- D4. Physical visits
- D5. Virtual visits (i.e. to the library web site)
- D6. Consultation of electronic journals
- D7. Consultation of electronic books
- D8. User training
- D9. Hours dedicated to user training

Resources – Library premises

- D10. Total surface area (m2) (non-priority, given the degree of variability of surface areas dependent on individual library locations within their institutions)
- D11. Surface area for public use
- D12. Seats available for users
- D13. Group study areas (non-priority, provided by too few countries)
- D14. Number of computer work stations for users (non-priority, non-existent in France)
- D15. Main library opening hours per week (normal period) (average per institution)
- D16. Main library days open per year (average per institution)

Resources – Library staff

- D17. Library staff (FTE)
- D18. Staff training (days per year)

Resources – Library collections

- D19. Electronic journals and periodicals available (average per institution) (non-priority, data consistency not guaranteed)
- D20. Electronic books available (average per institution) (non-priority, data consistency not guaranteed)

Resources – Library expenditure

- D21. Total institutional expenditure (non-priority, too few countries)
- D22. Total library expenditure (including staff salaries and wages)
- D23. Library staffing expenditure
- D24. Library material expenditure
- D25. Library electronic material expenditure
- D26. Library electronic journal expenditure
- D27. Library electronic book expenditure
- D28. Total library budget income
- D29. Library income from the institution or governing organization
- D30. Internal revenue, membership fees or other local sources (excluding grants) (non-priority)

5. Common indicators

5.1. Constructing the corpus of common indicators

Indicators were identified as priorities if they met the following key criteria:

- Data required for their calculation are available for a significant number of countries (at least 4 or 5),
- They are included in the ISO11620 international standard (Information and documentation - Library performance indicators) (see Annex 2, which shows relationships between indicators in this study and the ISO11620 standard performance indicators),
- They were identified as priorities by the working group comprised of representatives from libraries and the MESRI, who met 3 times during this study (November, December and January).

5.2. Common indicators

These indicators are presented below in a consistent manner to the ISO 11620 standard.
NB 1: Additional non-priority indicators are included for exploratory purposes.
NB 2: Data on opening hours are used as indicators.

5.2.1. Library target populations

- I0. Number of students (enrolled in the study institution) / Country population (%)

5.2.2. Resources and services: Library adequacy / availability

Physical space availability

- I1. Surface area for users / Number of students
- I2. Number of students / Number of individual study places
- I22. Total surface area / Number of students (non-priority)
- I23. Number of computer work stations for users / Number of seats (non-priority)
- I24. Number of group study areas / Number of seats (%) (non-priority)
- D15. Main library opening hours per week (normal period) (average per institution)
- D16. Main library days open per year (average per institution)

Staff availability

- I3. Number of staff (FTE) / Number of thousands of students

5.2.3. Resources and services: Library use

Physical and virtual visits

- I4. Number of physical library visits / Number of students
- I5. Number of virtual library visits (to the library web site) / Number of students

Training for end users

- I6. Number of students participating in training / Number of students
- I7. Number of hours of training designated for users / Number of groups of 10 students

Loans and consultations

- I8. Number of loans of printed books / Number of students
- I9. Number of electronic journal articles consulted / Number of students and teacher-researchers
- I10. Number of electronic books consulted / Number of students and teacher-researchers

5.2.4. Resources and services: Library efficiency

Total expenditure

- I11. Total library expenditure (excluding salaries and wages) / Number of students
- I12. Total library expenditure (excluding salaries and wages) / Number of students and teacher-researchers
- I13. Total library expenditure (including salaries and wages) / Number of students
- I14. Total library expenditure (including salaries and wages) / Number of students and teacher-researchers
- I15. Total library expenditure / Total institutional expenditure (%) (non-priority)

Staffing expenditure
- I16. Staffing expenditure / Number of students (non-priority)
- I16bis. Staffing expenditure / Number of students and teacher-researchers (non-priority)

Material expenditure
- I17. Material expenditure / Number of students and teacher-researchers
- I18. Material expenditure / Total library expenditure (including salaries and wages)
- I25. Material expenditure / Library staffing expenditureе

5.2.5. Capacity for evolution and development

Collections
- I19. Electronic material expenditure / Material expenditure

Staff
- I20. Number of days of staff training / Number of staff (FTE)

Budget
- I21. Library budget income not provided by the institution or the supervising ministry (local authority subsidies or the library's own resources) / Total library expenditure (including salaries and wages)

6. Study limitations

Before attempting to place the situation of French university libraries in the context of other European countries, it is critically important to consider certain limitations inherent in the study's operational framework (deadlines and workload constraints, use of immediately available data) which should be addressed in subsequent study updates.

6.1. The study countries

The 13 study countries vary in population size and are primarily part of the European Union and in the eurozone, but also include those outside the European Union (Switzerland, Norway), or those that belong to the European Union but are not in the eurozone (Hungary, Denmark, United Kingdom), with the inclusion of the United Kingdom despite the fact that steps have been taken to leave the European Union.

These 13 countries combined represent a significant total population (327 million inhabitants including more than 9 million students as potential library end users), which is therefore highly representative of the overall European situation (with the European population currently estimated at nearly 520 million).

Ideally, we hoped to include data from Sweden (currently available, but not yet translated) and to retrieve data (when available) from a number of additional countries characterized by larger populations: Italy, Poland, Romania, Belgium, Greece, the Czech Republic and Portugal.

To evaluate the French situation, data from Italy and Belgium would undoubtedly have been useful given their geographical proximity and, importantly, the similar nature of their academic systems.

The study was thus adjusted to evaluate the situation in France (66 million inhabitants, over 110 institutions) by focusing on comparisons with Germany (82 million inhabitants, 244 institutions), the United Kingdom (66 million inhabitants, 168 institutions) and Spain (46 million inhabitants, 75 institutions).

The overall aim of the study was not to establish ranking between countries (for example, the "top 5") or to create "country groupings" in terms of levels of operational performance, such as for the Scandinavian countries (Sweden, Norway, Finland, Denmark), the former Eastern European countries or the former Baltic States, etc. That said, the raw data sources themselves are occasionally grouped by country (e.g. Germany + Austria, United Kingdom + Ireland).

6.2. Types of university libraries

The libraries included in this study were selected primarily for their academic character, meaning that they are attached to higher education institutions. Variations in their characteristics or types reflect differences between countries in terms of how higher education systems are structured. This degree of variability is best illustrated in the data sources themselves:

- Data on university libraries in France were collected from the general statistical survey of university libraries (ESGBU) issued by the Ministry of Education (e.g. Collège de France, Académie de Médicine, INH, CNAM, French Schools Overseas, etc.). They do not include the libraries attached to Grandes Ecoles or research organizations, or more broadly, the libraries whose institutions are not included in the Student Monitoring Information System (SISE).
- Data for France include inter-university libraries (BIUS) (e.g. BULAC, Sainte-Geneviève, Cujas, Sainte-Barbe, BNU Strasbourg, BIU Sorbonne, BDIC, BIU Santé..) as these are widely used by students enrolled in institutions that are included in the SISE index.

- Data for Germany relate to academic universal and university libraries ("Wissenschaftliche Universal und Hochschulbibliotheken") but exclude specialized scientific libraries ("Wissenschaftliche Spezialbibliotheken")
- Data for the Netherlands relate to university libraries but do not include universities dedicated to applied sciences.
- Data for Denmark relate exclusively to research libraries.
- Data for Finland do not include the National Library.
- Data for Norway relate to a consolidated national registry which includes all academic and special libraries, including the National Library.
- Hungary provided data from the Hungarian Academy of Sciences system libraries, health-service or medical libraries, specialized national libraries, and tertiary libraries, which, it should be noted, precise definitions of each of these typologies are unclear.
- Data for Estonia relate to a consolidated national registry covering specialized and scientific libraries and includes the National Library.

It can therefore be seen that in the absence of in-depth knowledge about how each country organizes their systems of higher education (and their libraries), perfect consistency in terms of mission and end users cannot be guaranteed. Notably for the fact that a type of library present in one country simply may not exist in another.

6.3. Data coverage

The fundamental basis for this study was selecting indicators for which data were both available and widely shared across the different countries.

This corpus of indicators built on common data obviously cannot guarantee accurate identification or measurement of all key issues facing academic libraries in 2018.

For example, as we have just shown, consolidating and comparing data pertaining to print collections across countries presents clear challenges. An interesting alternative might have been instead to measure how print collections evolve compared to digital collections.

Similarly, certain particularly key data (at least for France) are only available in France (and very few other countries): data pertaining to the development of open archive collections, staff working time by type of activity, the share of students employed as library staff, total institutional material expenditure (versus library expenditure included in the surveys).

Lastly, among all the indicators identified in this study, none are readily available to measure two of the core issues underlying transformational changes currently taking place in libraries, which effectively define the two complementary purposes of academic libraries:

- Library contributions to student success, and
- Library contributions to research performance.

6.4. Data consistency and comparability

Although common data elements in this study are largely based on systems of international standards such as the International Library Statistics (ISO2789) and the Performance Indicators for Libraries (ISO11620), or common codes of practice such as Counting Online Usage of NeTworked Electronic Resources (COUNTER), it is clearly impossible to ensure that all data are based on these standard definitions and that within-country (and cross-country) comparisons of measures are completely consistent.

This is particularly the case for:

- data pertaining to consultation and library use (physical visits, website visits, consultation of electronic journal articles or electronic books),
- different methods for measuring surface areas (floor area in France),
- the scope of library expenditure, which more or less includes investment expenditure and overall operating expenses per institution (in the case of local premises and operating materials),
- measuring library opening hours (for example, the notion of "main library" defined by the ISO2789 standard does not exist in France).

To address variations in comparability, we have assigned values (colors) to each of the study indicators throughout this study as:

- high comparability
- moderate comparability
- low to no comparability

A specific case of questionable consistency between countries relates to financial data (library expenditure and revenues). Ensuring consistency across all data sets would have required altering the analyses to account for both costs of labor (as the major library expenditure category) and costs of collections (print and digital), which effectively would be dependent on the publishing situation of each country.

6.5. Data quality

Naturally, we used each country's data as they were presented and made no adjustments, despite several cases where we detected (rightly or wrongly) questionable or seemingly erroneous values, as for example:

- sudden variations from one year to the next, or
- data values for certain institutions that appeared abnormally high compared to national averages.

For some countries, only a limited amount of data was made available by the institutions. This was the case, for example, in France where data for institutional budgets were not always provided for every library institution included in the study.

7. Benchmarking

We should recall that the objective of this study is:

- First, to provide **a clear picture of the "average" European situation** (expressed in terms of values for 2016 and trends observed over the 2013-2016 period),
- Next, to provide **a clear picture of the relative situation in France** based on these same values for 2016 and trends for the period 2013-2016, with a view to formulating, if possible, avenues for reflection or potential actions at the national level, and
- Finally, to **evaluate the "comparability" of data from the different countries.**

This study is not intended to be used to rank all countries, nor is its purpose to underline "good" or "bad" points.
The general approach, with a few exceptions, will be to highlight the situation in France by favoring comparisons with Germany, the United Kingdom and Spain.
To the degree that this is possible with the data made available to us, this study will then attempt to answer the following question: how have European countries, specifically France, fared in terms of performance over the last four years in light of several challenging, sometimes adverse, contextual circumstances:

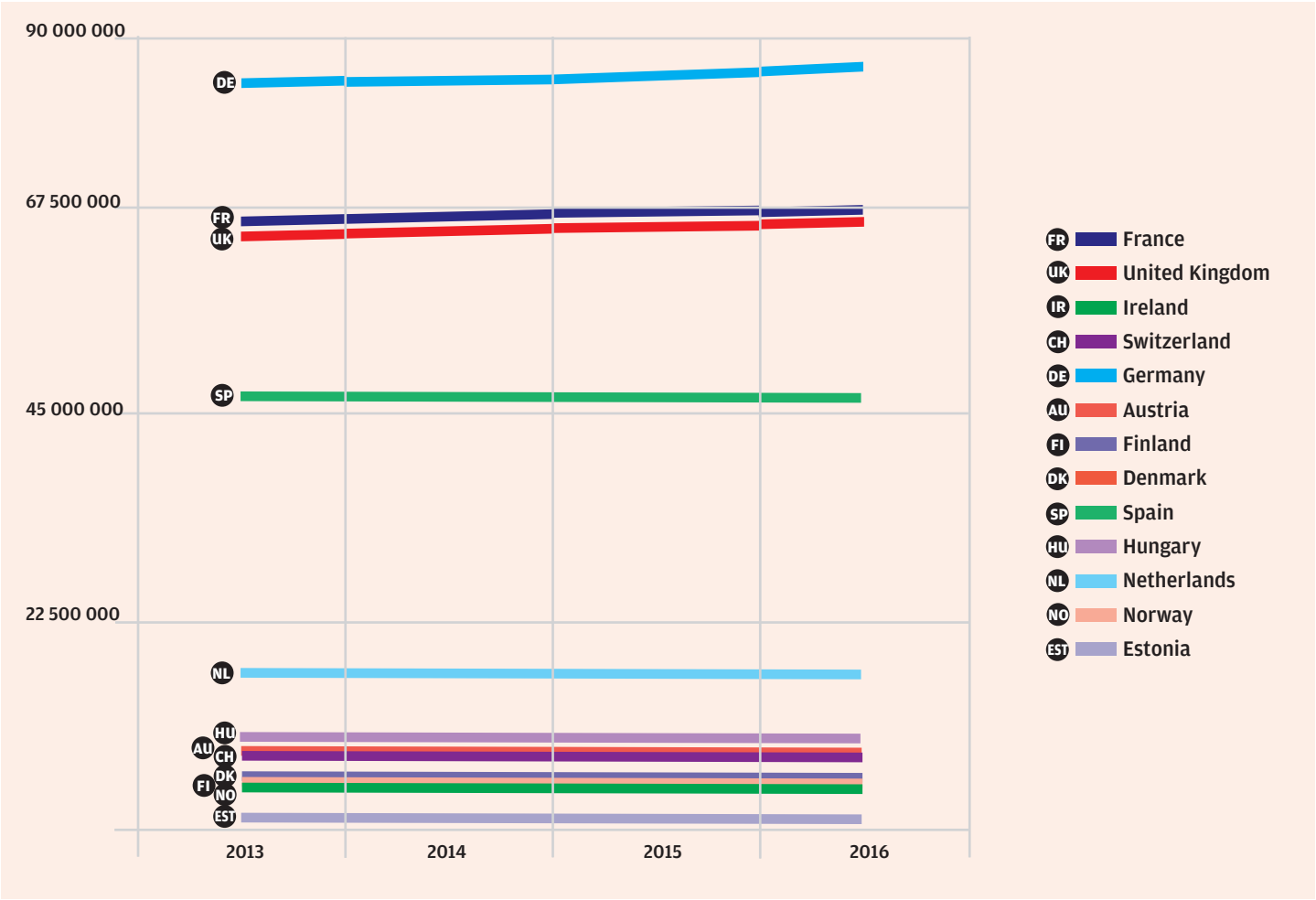
- **An increasing student population,**
- **Tension surrounding State budgets**, and cascading cuts affecting budgets normally allocated for higher education and libraries,
- **Digital transformation**, which is revolutionizing both library services, notably by dematerializing library collections (with associated increases in expenditure), and use by students as end users, most of whom are digital natives,
- **Educational transformation**, which potentially involves libraries offering new services to users (e.g. group study areas).

NB: What we refer to below as the "European average" corresponds to averages among indicators for the different countries, and not to one average consolidating all data from all countries considered as one. "European averages" as presented in the following sections therefore do not take into account the relative contribution specific to each country (for example, in terms of numbers of students). For this reason, we advise considering any reference to "European average" with a degree of caution.

7.1. Students as libraries' target audiences

7.1.1. A European population increasing slightly, as in France

(DO. Population)



Values for 2016

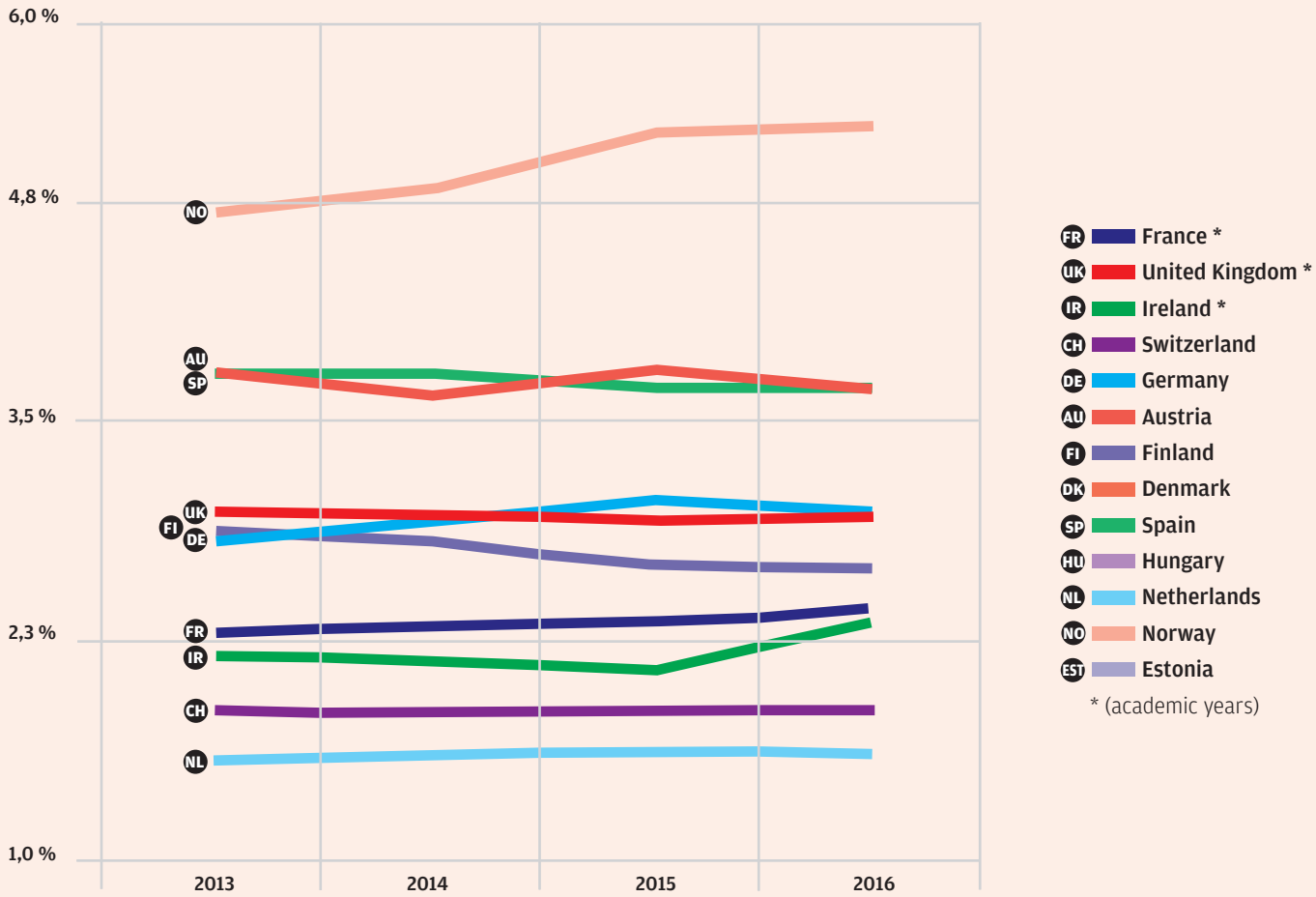
Four countries have populations ranging from 46 to 82 million: Spain (46 million), United Kingdom (65 million), France (66 million), Germany (82 million). Populations for the other countries included in the survey range between 1.3 and 10 million inhabitants. The Netherlands falls mid-range with a population of 16 million.

Trends for 2013-2016

The total population of the European countries included in the study experienced a slight increase (+1.6 % for 2013-2016), while France's increase was only slightly higher (+1.8 %). Among the 4 largest countries, only Spain showed a slight decrease in population.

7.1.2. A growing student population, particularly in Francee

(IO. Number of students (enrolled in the study institutions) / Country population (%))



Notes on the data

It should be noted that data for student populations in France only include those institutions present in both the ESGBU (library data) and the SISE (student data) indexes. There are, for example, more than 1.7 million students in France who are not listed in the ESGBU because they are enrolled in business, engineering or vocational schools (agriculture, nursing, etc.). According to the MESRI, the estimated total of all French students is (at the time of this study) 2.5 million.

Data on student populations were not available for 3 countries (Denmark, Hungary and Estonia), which prevented us from determining a real total and a European average for all the study countries. For all other countries, the total is just over 9 million students, with students representing 2.9% of the total population.

Values for 2016

The 4 largest countries have between 1.5 and 2.5 million students: Spain (1.7 million), France (1.7 million), United Kingdom (1.9 million), Germany (2.4 million). Student populations for the remaining countries range from 140,000 and 333,000.

Trends for 2013-2016

The proportion of students who make up the European population is, on average, increasing (+ 2.5%), particularly in France (+ 6.9% of students in the total population and an 8.8% increase in students enrolled in the institutions

included in the study, which translates to nearly 135,000 additional students between 2013 and 2016). A population increase was equally recorded for Germany (+5.5% with +7.8% of the student population), while the population of the United Kingdom decreased slightly (-1.5%, despite a 1.1% increase in the number of students), as was the case for Spain (both the total population and student population decreased). **The impact of student population growth is , therefore, significantly higher in France.**

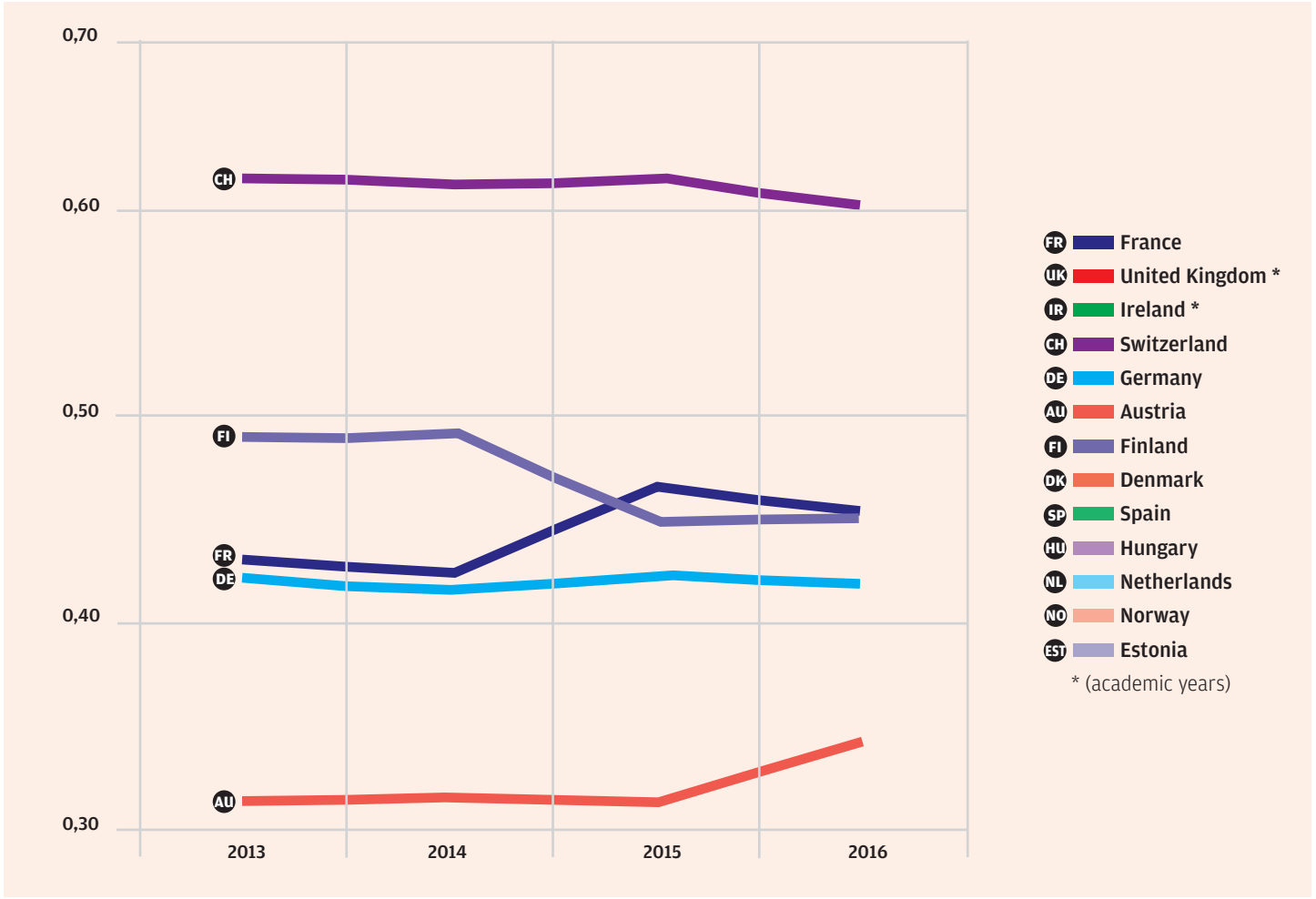
7.1.3. Changing numbers of academic staff makes comparisons uneasy

Among the 4 countries in the first group, France stands out for having significantly lower numbers of academic staff. This can in part be explained by the fact that figures provided for this study correspond exclusively to the university lecturer management application (GESUP), which lists permanent tenured personnel as associate professors or university professors while excluding non-permanent teaching staff and high school teachers seconding to higher education. The number of academic personnel is therefore underestimated for France.
Data from Norway and Finland contain non-academic staff (resulting in a slight overestimation of their workforce).
The trend observed in France of a very slight decline of academic staff (0.3%) – contrary to the same population in the United Kingdom, Germany and Spain which increased substantially (+9% in Germany and +5% in the United Kingdom) – can therefore only be attributed to **excessive pressure on full professors in the French higher education system.**

7.2. Physical libraries

7.2.1. France has increased the number of areas designated for users, which has allowed it to catch up with European averages and to be in keeping with (through 2015) the increase in students

(I1. Surface area for users / Number of students)



Notes on the data

Concerning physical library space, we purposefully used the term “surface area for users” in place of “total surface area” which could cover areas for functions shared with the library’s operations (e.g. administrative support offices, IT premises) or external spaces (designated for storage and utilities).
That said, data on surface area designated for users were only available for 5 countries (France, Switzerland, Germany, Austria and Finland) and is notably absent for the United Kingdom and Spain.

Values for 2016

France is just below the European average: 0.45 m^2 / student vs. 0.46 m^2 / student. The national total for France of course masks differences between academic fields and does not differentiate regional sources, for example, between Paris, Ile-de-France and the provinces.

Trends for 2013-2016

It was difficult to get a clear reading on European trends based on data for only 5 countries, but we were able to note the following:

- A very slight increase in Germany (-0,4%),
- **A clear improvement in the French situation (+5,6%), largely made possible by the wave of constructions, but which slowed down between 2015 and 2016 when the greatest increase in students occurred** (despite the overall increase in the physical libraries’ surface area).

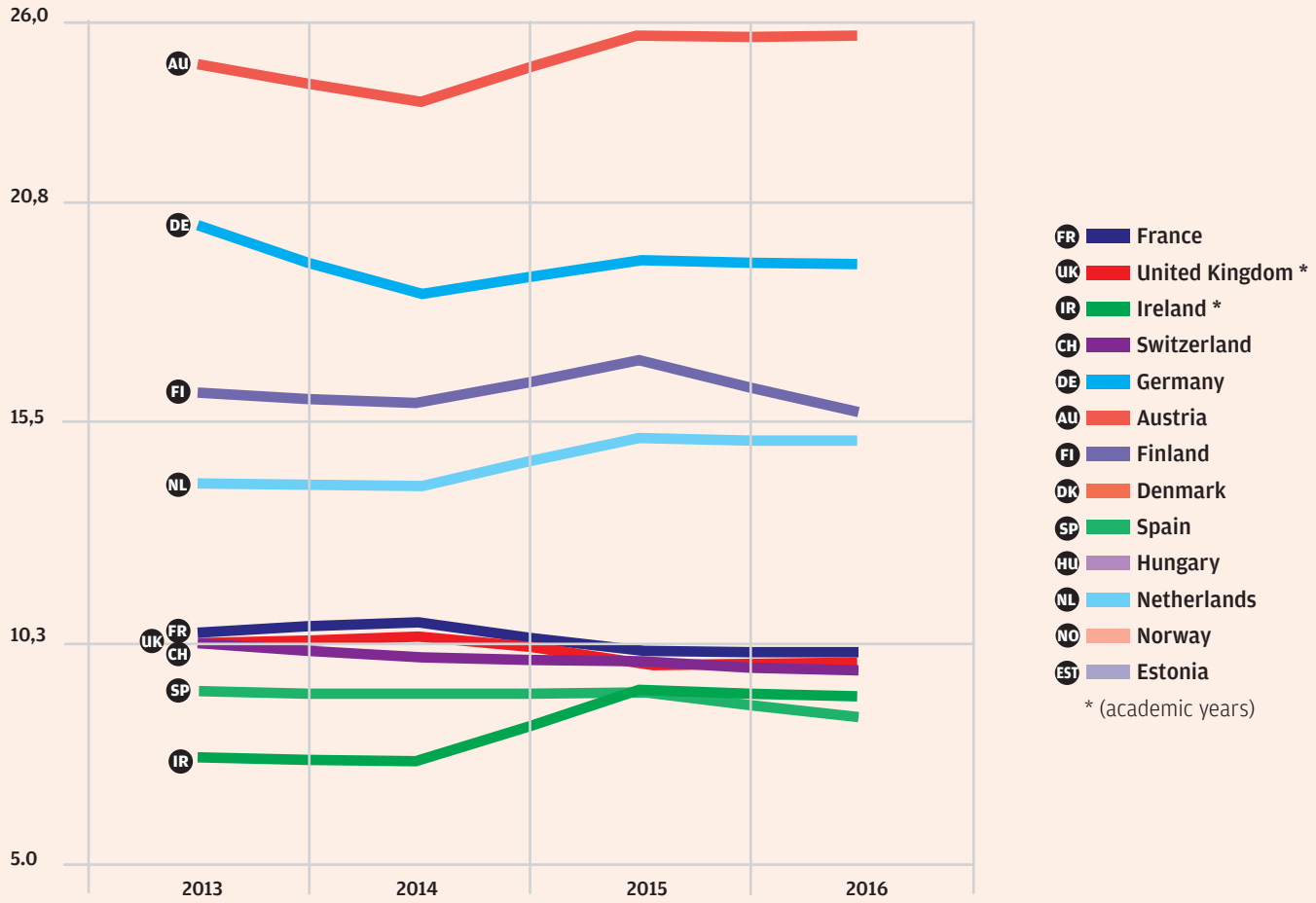
This situation should therefore be expected to decline, particularly in France, as the number of students steadily increases.

Points for reflection

In the absence of new construction projects, the challenge is in finding design solutions aimed at increasing surface area dedicated to end users within the library’s total surface area. Converting existing spaces (offices or storage) into areas suitable for user access is often difficult. The other option is to find physical spaces outside of the library itself for documentation services as part of an effort to bring library use closer to teaching and learning activities.
NB: In 2016, 57% of physical library space in France was designated for end users (48% in Germany, 40% in Switzerland).
Naturally, the availability of surface area offered to library users needs to be considered in relation to library opening hours..

7.2.2. The provision of seating places has increased in the 4 largest countries, which has enabled France, whose offer is above the European average, to be in keeping with(through 2015) the increase in students

(I2. Number of students / Number of seating places)



Notes on the data

The provision of seating places needs to be assessed in connection with libraries' opening hours (see below). An indicator on "available seating places" would therefore have made more sense. As the situation currently stands, data pertaining to libraries' opening hours are generally only available for those countries whose data specify "main library", which is a concept that does not exist in France and is not taken into account in the ESGBU survey.

Values for 2016

In terms of seating places, France is above the European average (in the positive sense): 10.1 students / seating places vs 13.5 students / seating places.
NB: For the full spectrum of higher education institutions comprised of 2.5 million students, the MESRI reported 12 students per seating place.
The situation in France is virtually at the same level as the United Kingdom (9.7 students per seating place) and **is markedly more favorable than in Germany** (19 students per seating place).

Trends for 2013-2016

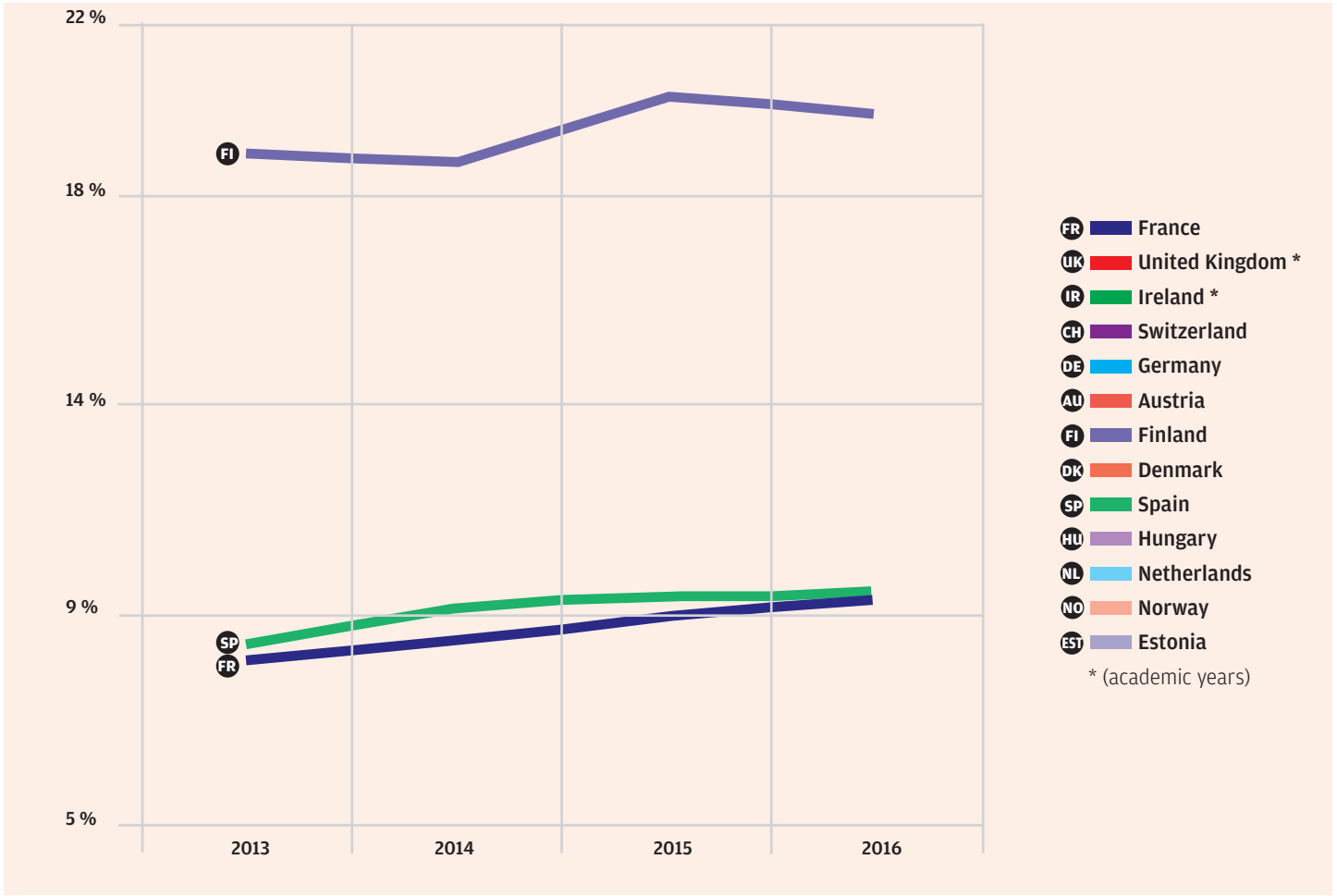
While European trends have largely remained stable, **the French situation showed slight improvement between 2013 and 2016** (-3.1%) **even if a decline took place between 2015 and 2016 (+1.9%) when growth in student enrollment was the greatest** (despite the increase in seating places).
The situation in terms of user areas should therefore continue to decline as the number of students steadily increases, and therefore especially in France.

Points for reflection

Again, barring the possibility of new construction, the challenge is in identifying viable design solutions to increase the number of seating places in the same space libraries designate for users. One possible option, for example, would be to reexamine how existing spaces are used for free access to collections and to maximize use of space by taking a “less is more” approach in terms of what materials are presented, particularly in light of a general decline in the number of users who borrow printed books and journals (see below).
Another option would be to seek out off-site locations or explore the possibility of using external areas pertaining to the library for providing access to materials as part of the overarching goal of bringing the use of library resources and services closer to teaching and learning activities.

7.2.3. The provision of group study areas has increased significantly in France

(I24. Number of group study areas / Number of seats (%))



Values for 2016

This was not considered as a priority indicator since only 3 of the study countries track the use and availability of collaborative work spaces (Spain, France and Finland). What did emerge was that for both France and Spain, the percentage of available group study areas is roughly 10%.

Trends for 2013-2016

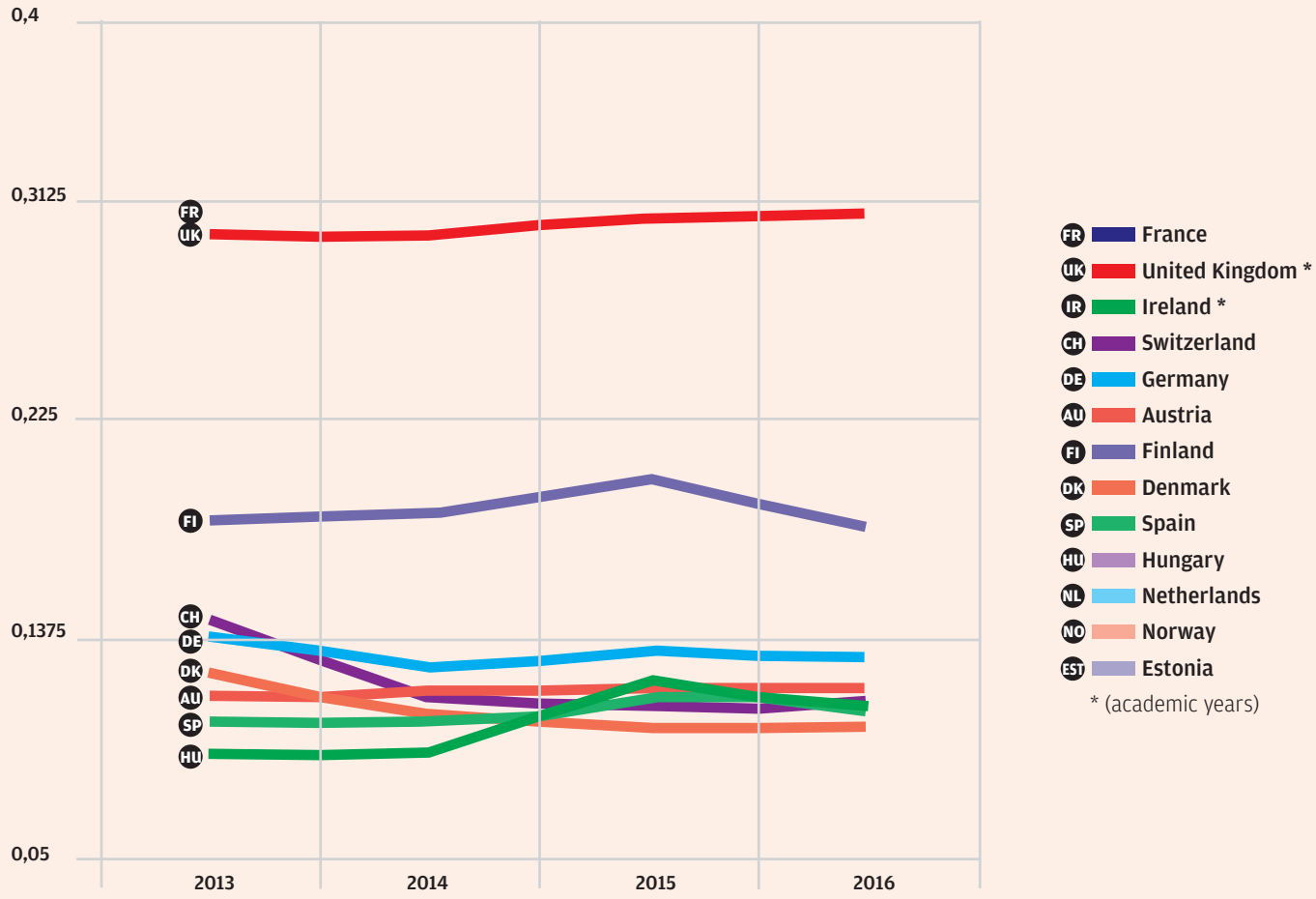
This indicator increased significantly in France, by just over 31%.
The need for more group study areas should be expected to increase at an even greater rate as a number of universities are currently changing their educational approach and curricula to favor project-based learning, which by design involves students working in collaborative groups. The situation in Finland where values for this indicator are comparatively high at some 20% may therefore serve as a model.

Points for reflection

These new needs linked to transformational changes in higher educational approaches will require adaptive design solutions that will prompt libraries to evaluate the flexibility of existing space that could be converted for group use, especially areas located off-site.

7.2.4. The provision of computer work stations for users has remained stable across Europe

(I23. Number of computer work stations / Number of seat)



Values for 2016

This indicator was not considered as a priority, simply because the data do not exist in France. It is interesting to note, however, that data related to areas designated for computer equipment are relatively homogenous between countries, ranging between 10% and 13% of computer work places, with the exception of Denmark (18%) and the United Kingdom, where it is substantially higher (31%).

Trends for 2013-2016

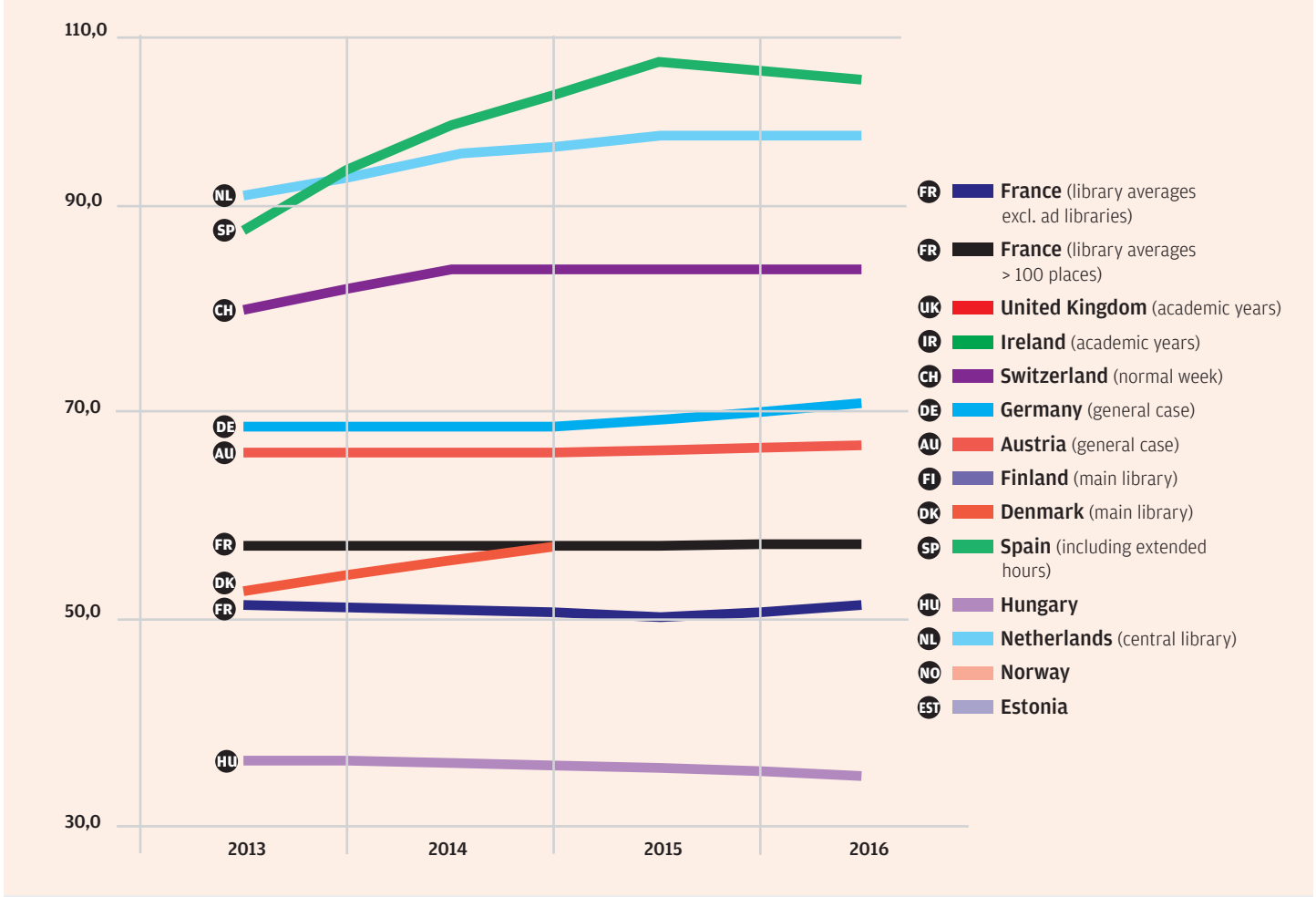
It is worth noting that only a slight overall drop occurred for this indicator (-4.1%), which even increased in the United Kingdom, whereas we might have expected a sharp drop due to the increase in the level of equipment in personal computers and devices among students.

Points for reflection

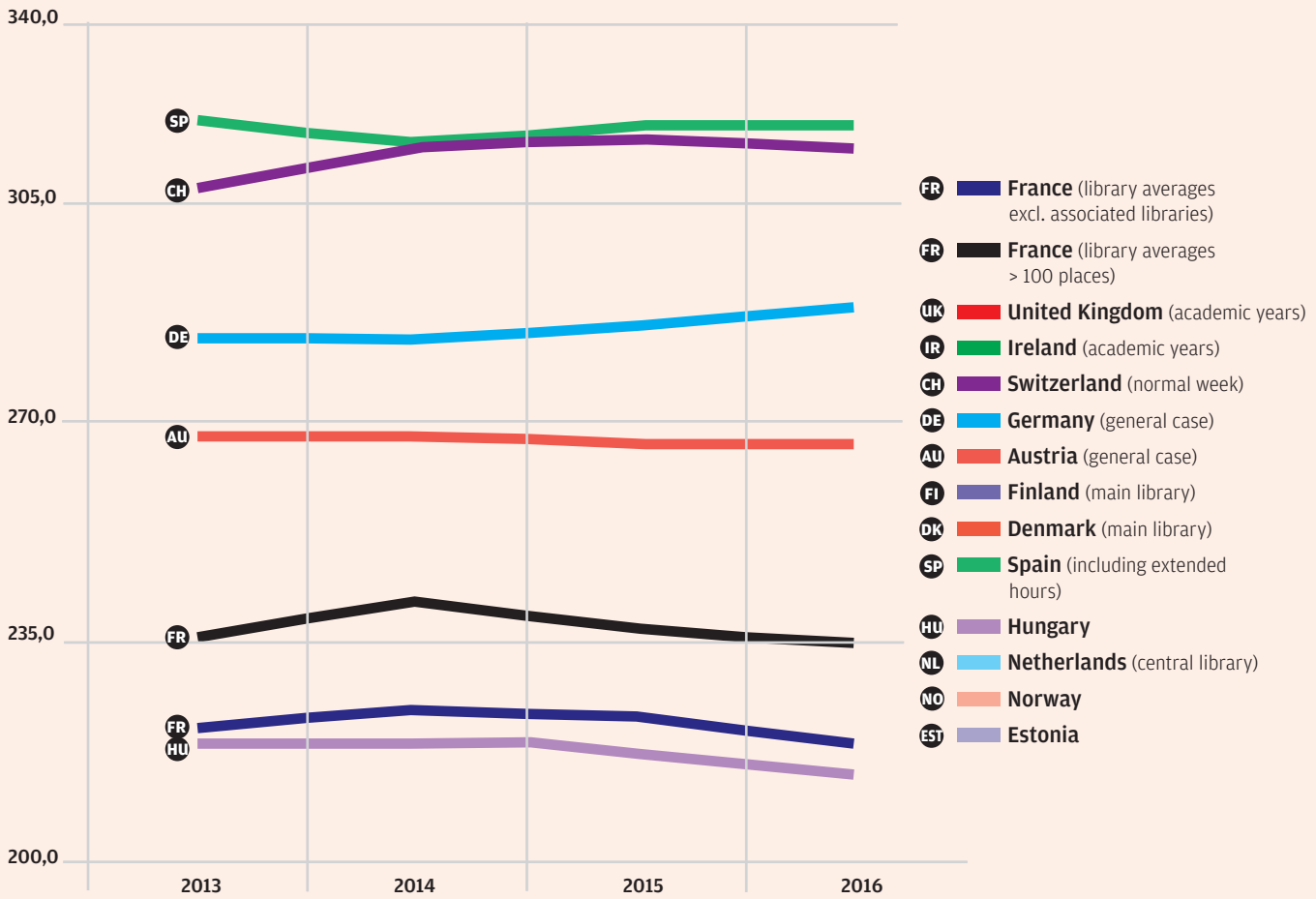
In view of strong price pressure associated with developing libraries' work areas (for both individual and group use), the solution in France will clearly not involve allocating additional resources for more seating places with stationary computer work stations. There are, however, other solutions that many libraries have turned to that involve developing laptop lending programs.

7.2.5. Library opening hours are difficult to compare, but as things stand currently, the situation in France is inferior to that of Europe

(D15. Main library opening hours per week (normal period) (average)



(D16. Main library days open per year (average))



Notes on the data

These data, while strategic, are rather difficult to compare from one country to another:

- The concept of "main library" does not exist in France and is not considered in the ESGBU; for this reason, we began by calculating the average of integrated libraries (excluding associated libraries) and then, we calculated the average for libraries with more than 100 seating places (similar to the approach taken by the Annual Performance Report),
- These data do not exist for the United Kingdom (where all libraries are open 24 hours a day, the ultimate scenario of extended hours!),
- Data for Spain include extended periods and do not relate to normal periods (which resulted in exaggerated data compared to other countries),
- Data for Finland were excluded altogether for the reason that several institutions consolidated data from all libraries combined (ultimately resulting in more hours than there are in a week or in more days than there are in a year), which made it impossible to calculate a national average.

Values for 2016

An evaluation of the situation in France, even considering those libraries with more than 100 seating places, places it far below situations in all other European countries (except Hungary):

- **in France (over 100 seating places) (2016): 59 hrs per week and 235 days per year,**
- **average in Europe (2016): 67.5 hrs per week and 266 days per year**
- in Germany (2016): 70 hrs per week and 290 days per year,

- in Switzerland (2016): 85 hrs per week and 318 days per year,
- in the Netherlands (2015): 98 hrs per week (number of days per year not furnished).

NB: MESRI reported the measure of 61 hrs per week (and not 59 hrs per week) and the European average (across all countries) as 65 hrs per week.

Trends for 2013–2016

What is also striking about the French situation are the changes in weekly opening hours, notably a very slight increase in France (+0.8% over the 2013-2016 period), with a slightly more significant increase everywhere else (+2.3% in Germany and +5.5% in Switzerland over 2013-2016, and +6.5% in the Netherlands over 2013-2015).
The number of days libraries are open in France also, however, showed a decrease of 1.1% whereas it increased by 1.5% in Germany.

Points for reflection

For France, it is obviously necessary here to mention the "open libraries"[2] initiative which is expected to produce measurable results in 2017 and 2018 when the study is updated.

Considering increasing library opening hours (and days open) in France as a theoretical objective necessarily requires a practical assessment gauging the adequacy of established calendars against the real needs of users (which is what many university libraries do already):

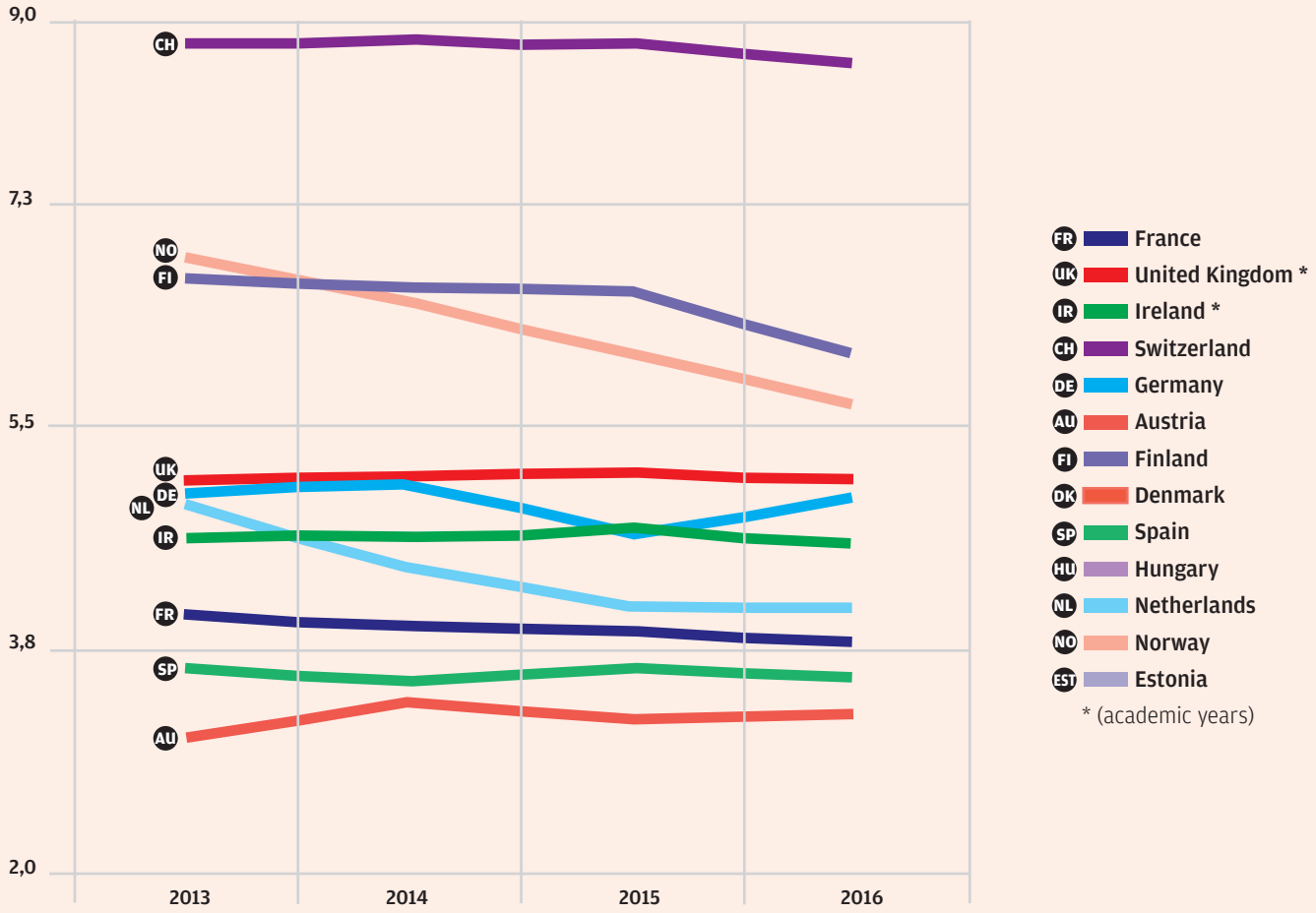
- Evaluating the number of libraries' operational days should involve correlating the universities' academic calendars (known for being relatively compact): as it is neither practical or useful for all libraries to remain open all year round, selected libraries (not necessarily the main library) could remain open during off-peak periods (holidays, periods dedicated for retaking exams),
- Evaluating opening hours should involve correlating libraries' timetables with the universities' academic calendars: as it is neither practical nor useful for all libraries to remain open all day long, selected libraries could remain open during off-hours (evenings, weekends), and similarly, alternatives to the main library could potentially be libraries located in the city center with appropriate access to public transportation, appropriate security, possible food service or café availability, etc., which is directly linked to the quality of the facilities).

(2) http://www.enseignementsup-recherche.gouv.fr/pid29939-cid116394/plan-bibliotheques-ouvertes-ameliorer-l-accueil-des-etudiants-en-bibliotheques-universitaires.html

7.3. Library human resources

7.3.1. Library staffing and organization (FTE): in France, a situation below the European average and an increase that is not in keeping with the increasing student population

(I3. Number of staff (FTE) / 1000 students)



Values for 2016

France is well below the European average: 3.8 FTE / 1000 students vs 5.0 FTE / 1000 students, with values for the other major countries as:

- Germany: 4.9 FTE / 1000 students,
- United Kingdom: 5.1 FTE / 1000 students,
- Spain: 3.5 FTE / 1000 students.

NB: French FTEs refer to all types of staff, including contractual staff, independent contractors and hired students.

Trends for 2013-2016

The situation is declining in almost all countries (-5.3% in total) - with the exception of the United Kingdom which is increasing slightly - **and particularly in France** (-6% over the 2013-2016 period), despite an increase of 2.3% in FTEs, which is directly related to an increase in students.

Points for reflection

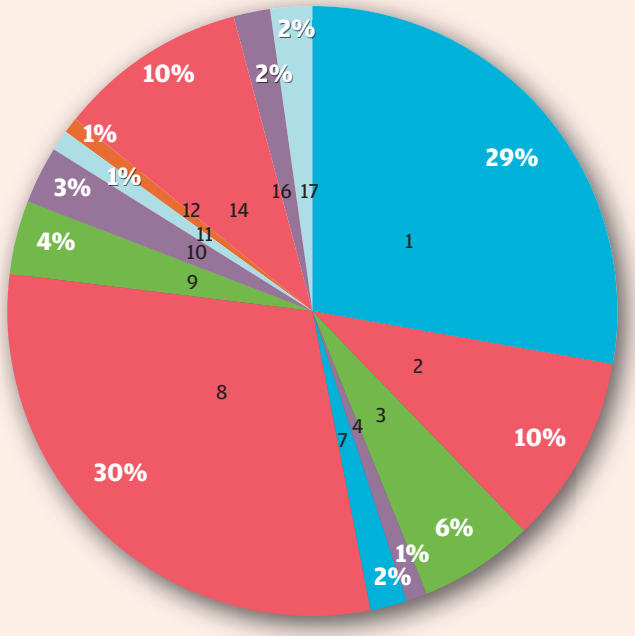
To improve this indicator and compensate for the significant challenges currently facing libraries in terms of creating additional permanent and fixed-term positions, libraries today are more and more frequently studying ways of achieving more with existing resources.

This indicator should also be analyzed in relation to:

- activities performed
- management ratios (i.e. between staff categories A-B-C) and the degree to which the different countries rely on independent contractors and student employment.

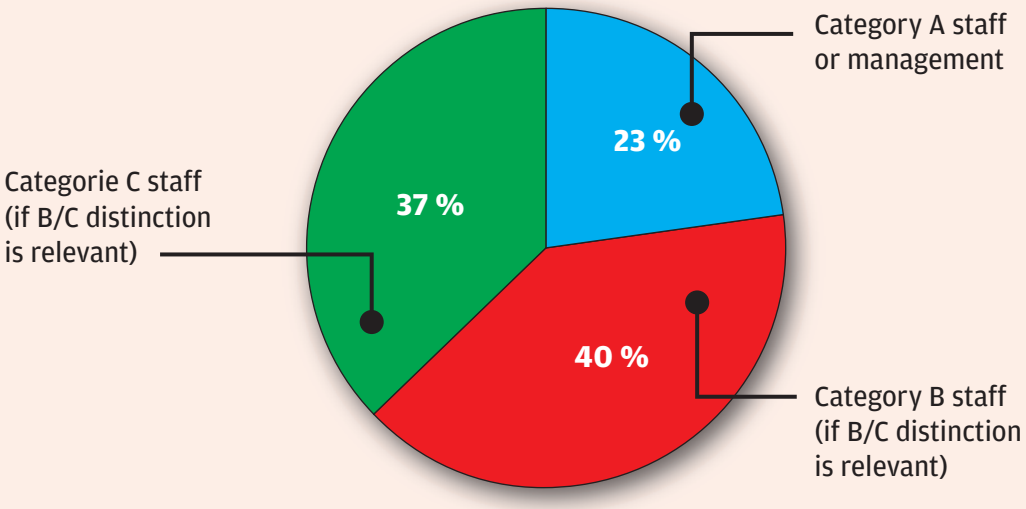
Unfortunately, the current common data do not allow for further analysis of these specific areas.

Activities in France for 2016 (% of FTEs)



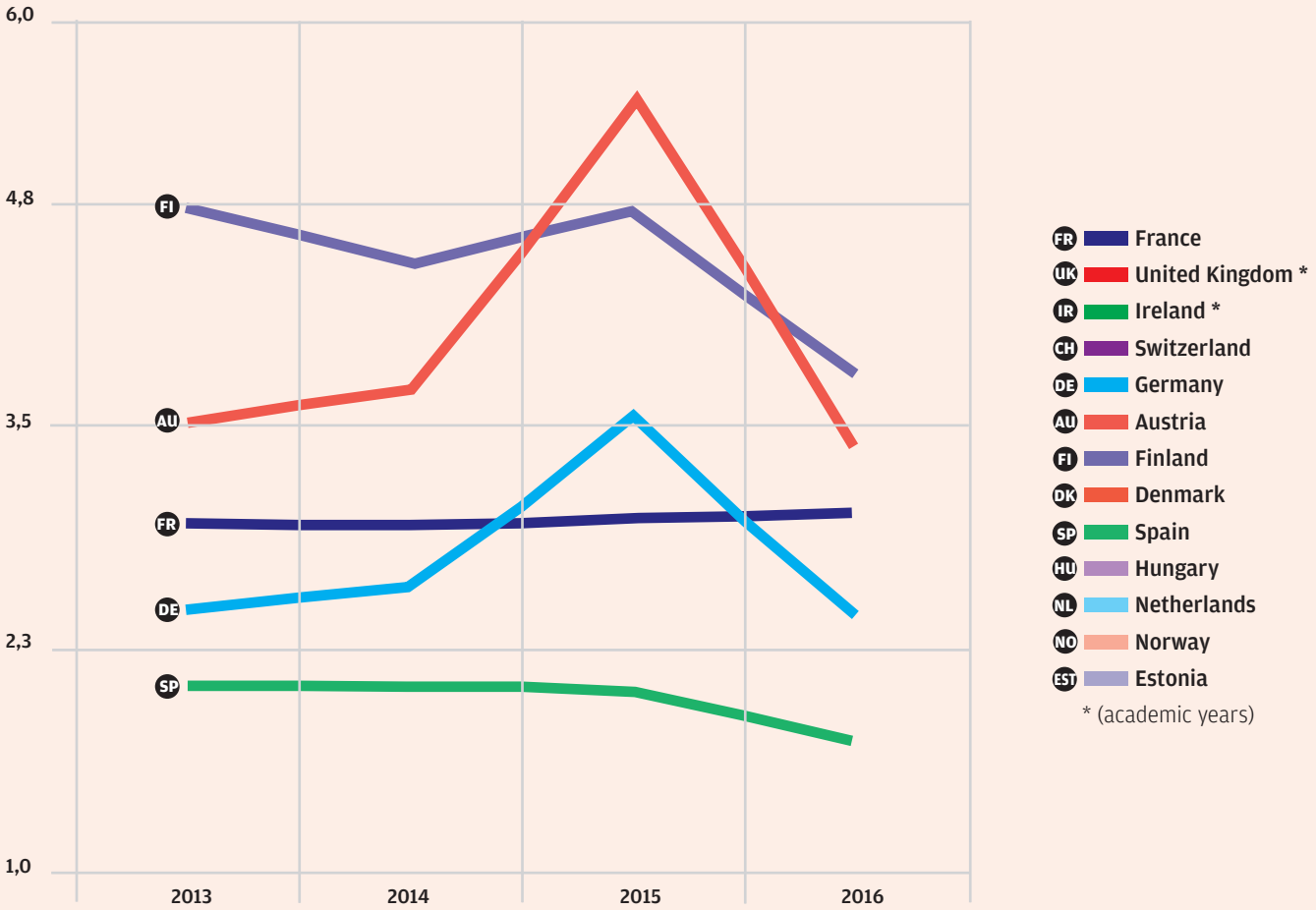
1 Reception, information, guidance
2 Material delivery services (loans, communication)
3 User training / educational program development
4 Open and institutional archives
* Bibliometrics
* Processing and valorizing research data
7 Cultural actions
8 Acquisition and processing of printed books
9 Provision / development of digital services and ressources
10 Information engineering / Information systems
11 National and international cooperation and partnerships
12 Monitoring
* Publishing
14 Support functions: supervision, management, project management
* Management, facilities management, property management, IT
16 Communication
17 Other
* = < 1%

Structure of jobs in France for 2016 (excluding student employment)



7.3.2. Staff training: related French efforts

(I20. Number of days of staff training / Number of staff (FTE) / year)



Notes on the data

This indicator could only be produced for 5 countries: France, Germany, Austria, Spain (beginning in 2015) and Finland. The data for Germany and Austria may need further review to determine if the peak in 2015 is normal.
The data for France, it should be noted, are slightly underestimated given that, while there are some exceptions, professional training is generally only offered to permanent and contractual staff, whereas the FTEs here include non-contractual staff.

Values for 2016

France is slightly above the European average: 3 days of training / FTE vs 2.8 days of training / FTE on average, while Germany is below this average (2.5 days of training / FTE).

Trends for 2013-2016

The situation in France is only one showing improvement (+4.6%), with an increase in staff numbers of 2.3%, **while situations for the other countries show a decrease:** a slight decline for Germany (-0.6%, with staff numbers up by 7.2%) and a more pronounced decline for Spain (-10.9%, while staff numbers dropped by 4.7%).

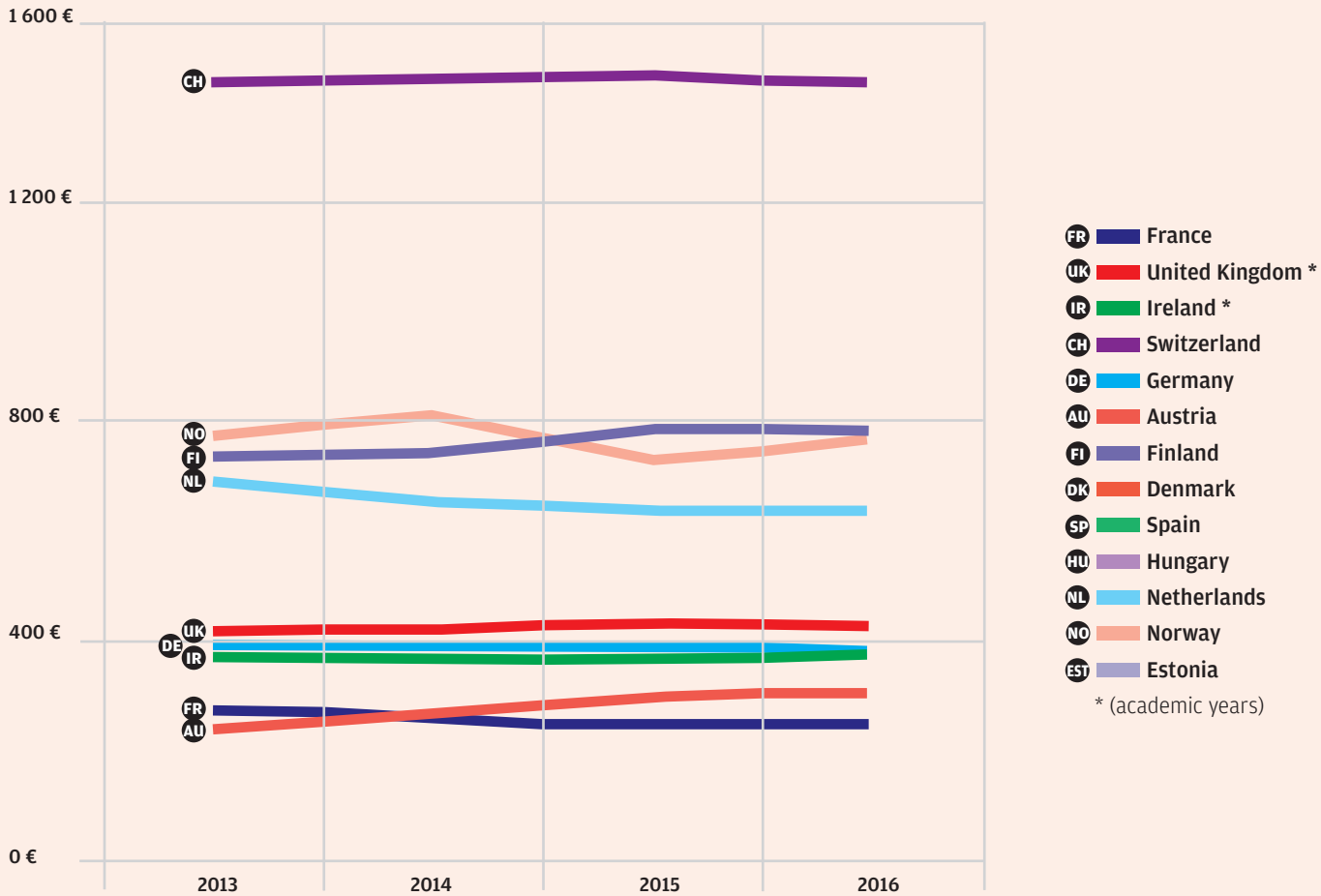
Points for reflection

Despite the seemingly favorable situation in France relative to the other countries, additional efforts may be necessary to keep abreast of changing needs and to ensure that library staff are equipped with the necessary skills (to boost productivity, to respond to new library uses, and to support the transition process to new material formats).

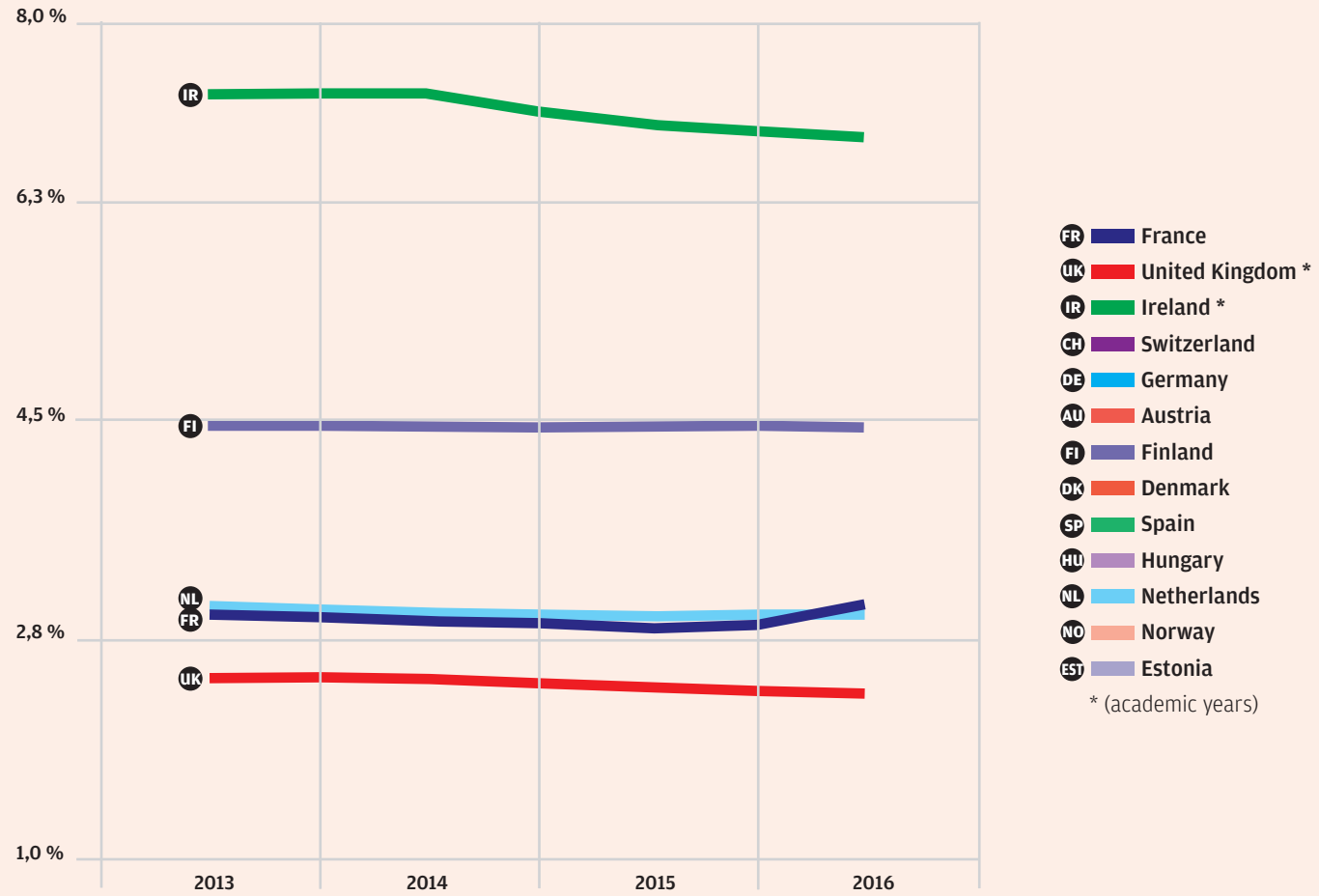
7.4. Library financial resources

7.4.1. Total library expenditure: in France, a situation below the European average and an increase that is not in keeping with the increasing student population

(I13. Total library expenditure (including salaries and wages) / Number of students)



(I15. Total library expenditure / Institution expenditure (%))



Notes on the data

We should recall here that accounting for all expenditures would have necessitated altering the depth of our analyses to consider costs of labor and costs of purchasing material resources (the two principal expenditure categories) for each of the different countries.

This explains to a large extent, for example, Switzerland's very high position for all expenditure indicators (€1495 per student).

Data for total expenditure were not available for Spain.

Concerning the indicator of total library expenditure / Institution expenditure:

- a degree of caution should be taken when considering this indicator in France (3.1%), as it is based on partial data: a significant number of institutions are lacking data on their total expenditure (the French indicator is therefore overestimated), and
- no data are available for this indicator in Germany or Spain.

For future assessments of the French situation, it would be interesting to use data from France's Constitutional Bylaw on Budget Acts (LOLF) and its missions covering programs of public policy such as program 150 (higher education and university research) and program 150.5 (libraries financed by higher education).

Values for 2016

Concerning expenditure per student, **France is clearly below the European average:** €272 per student versus €503 per student on average (excluding Switzerland), with expenditure for the other major countries as:

- Germany: €403 per student,
- United Kingdom: €450 per student.

The proportion of library budgets for an institution in France is around 3% (very likely a low estimation given that data for institutions are not complete). Note, for example, the ratio of 2.1% reported for the United Kingdom (against 7.0% in Ireland).

Trends for 2013-2016

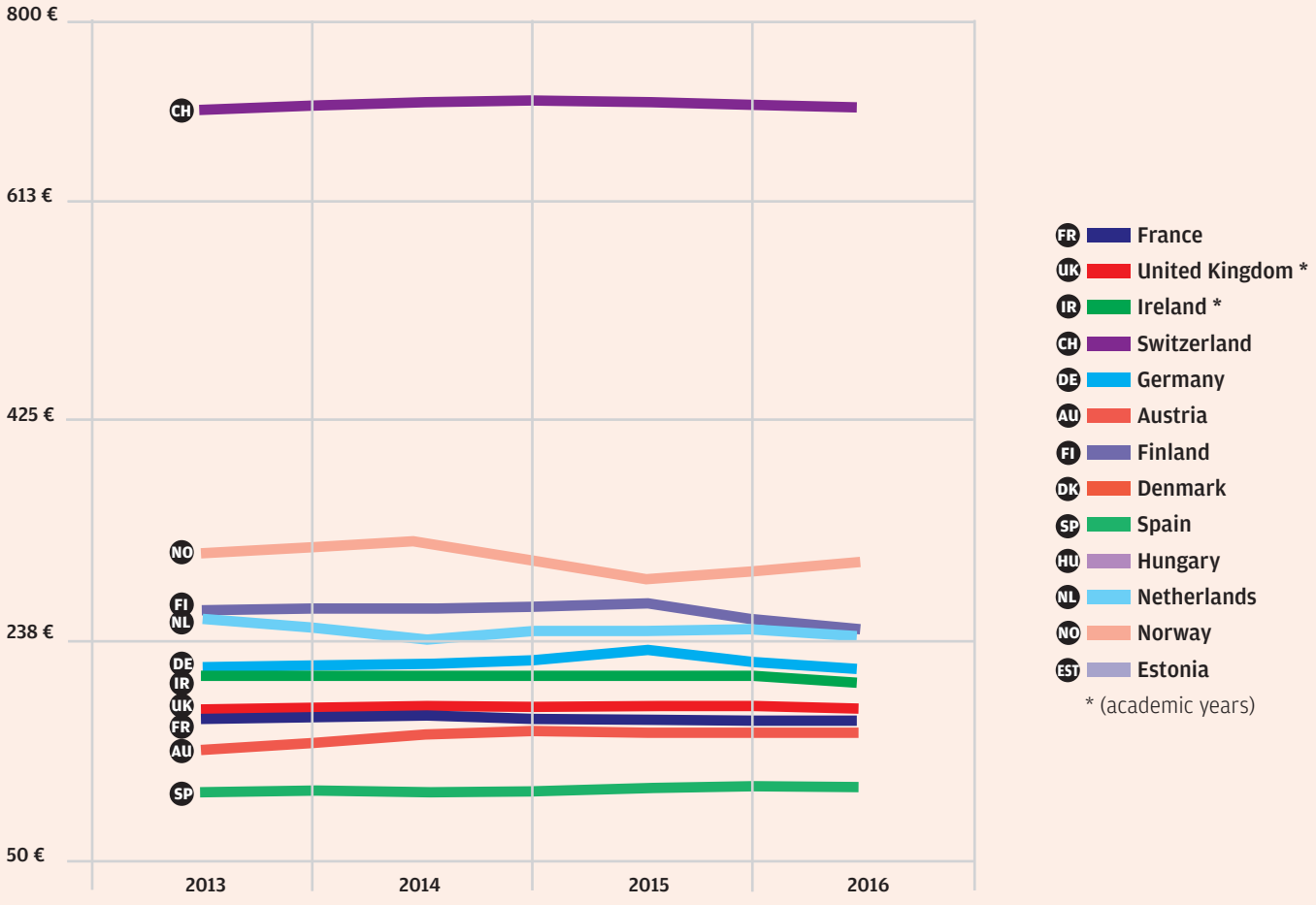
Regarding expenditure per student, **the situation in France is in decline** (-5.3%), which appears to be **directly correlated with pressures associated with the increase in students, while total expenditure is increasing** (+3.1%). The European situation is improving slightly (+1.2%); while the situation in Germany is in decline (-1.1%, despite an increasing student population), the United Kingdom is showing improvement (3.7%).

Points for reflection

It would be interesting to compare the percentage of each institution's total budget allocated for library spending by considering the percentage of time students spend in the libraries compared to the overall time students spend on campus.
This approach would effectively highlight the leverage effect of library spending, which for students is one of the most visible expenditures (notably investments in materials and physical spaces).

7.4.2. Staffing expenditure: in France, a situation below the European average and an increase that is not in keeping with the increasing student population

(I16bis. Staffing expenditure / Number of students and teacher-researchers)



Notes on the data

A thorough evaluation of staffing expenditure across all countries would require adjusting the analyses to consider labor costs (notably civil service salary structures) specific to each country, which explains here the very elevated position of Switzerland (€838 per student).

Values for 2016

France is well below the European average: €178 per student versus €232 per student as the average (excluding Switzerland), with expenditure for the other major countries as:

• Germany: €230 per student,
• United Kingdom: €202 per student,
• Spain: €122 per student..

Trends for 2013-2016

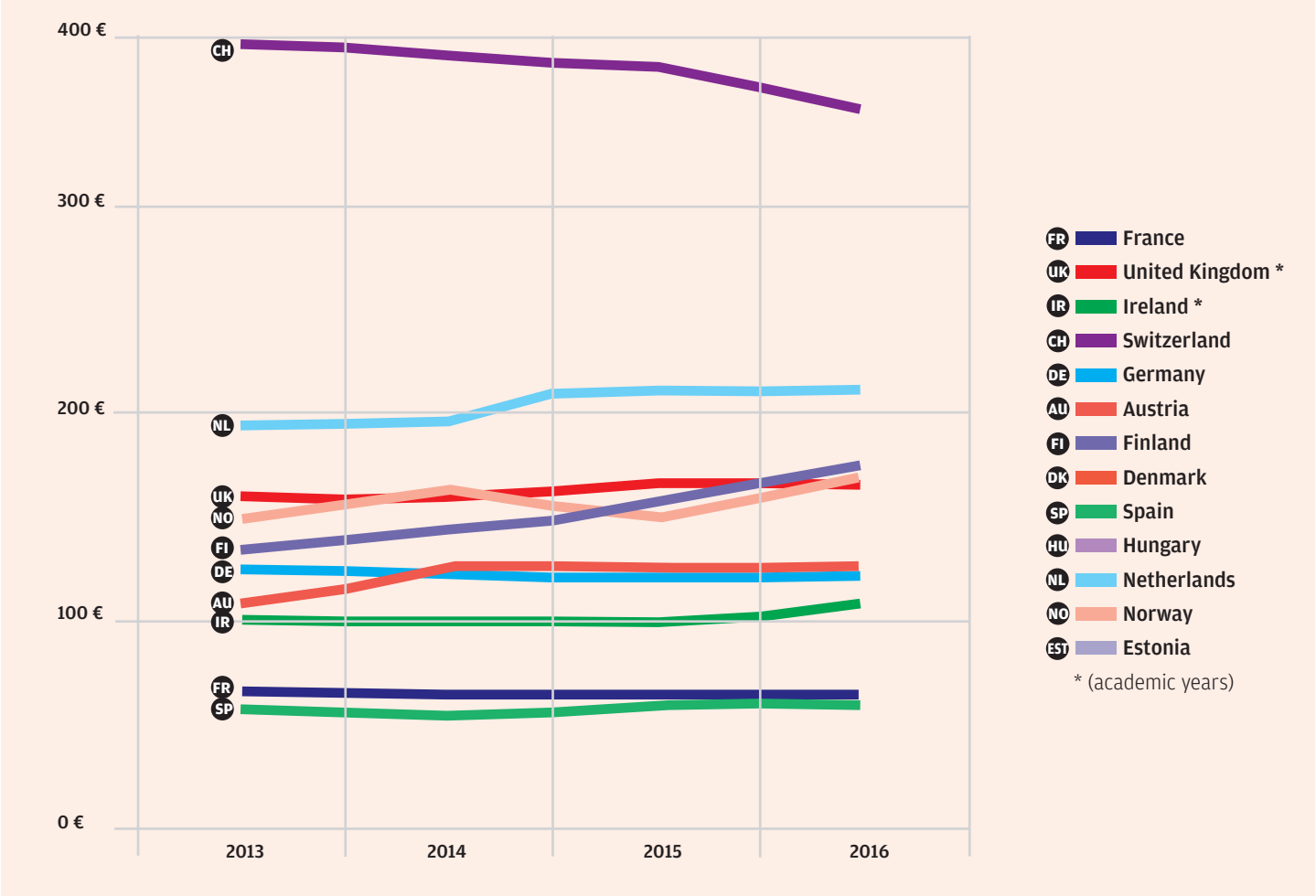
The situation is deteriorating in France (-4.2%), despite the increase in staffing expenditure (+4.3%), while situations for the other countries all show degrees of improvement: +0.3% for Germany, +2.7% for the United Kingdom and +6% for Spain.

Points for reflection

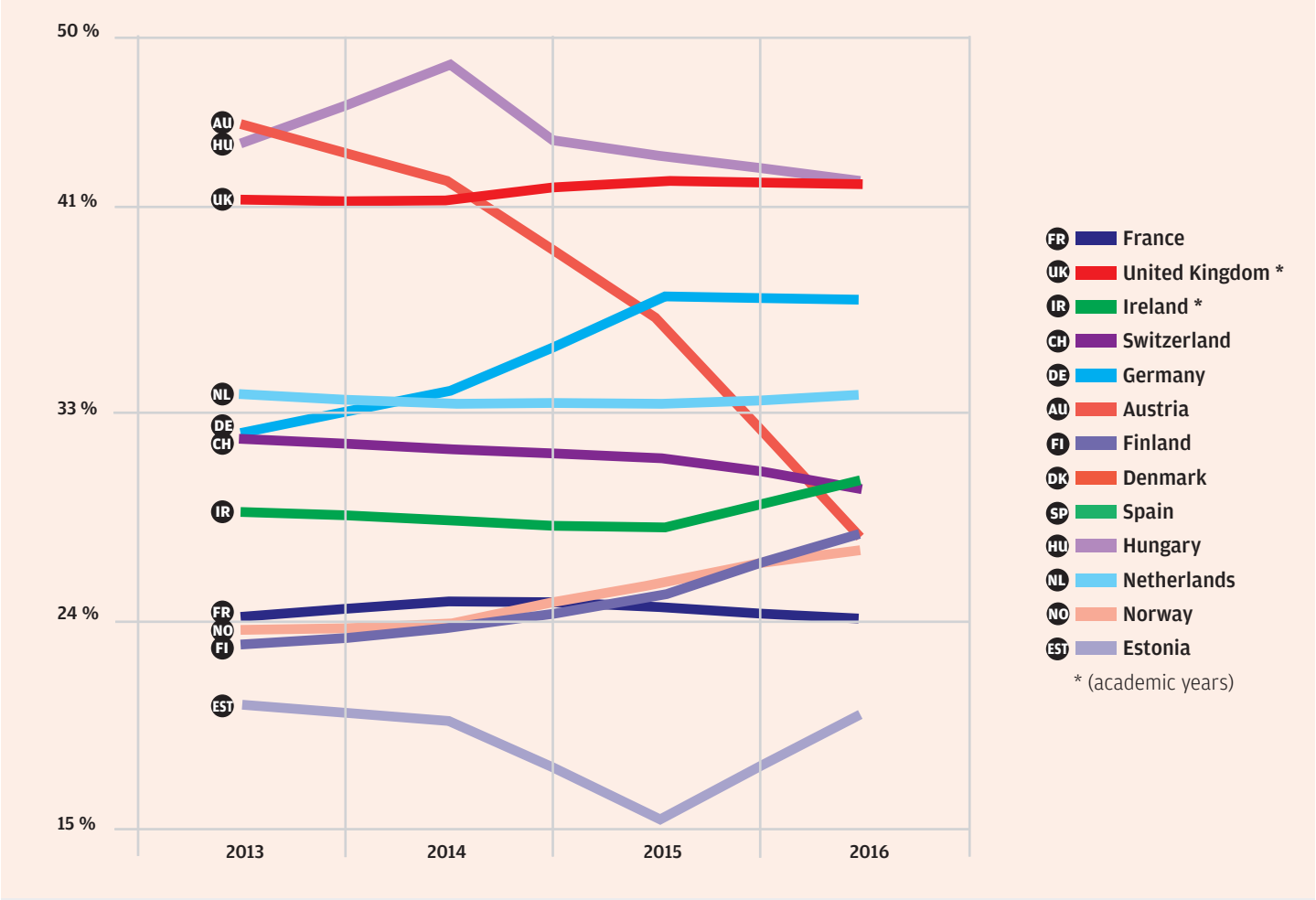
Developments in staffing expenditure per student will depend on:
• possible future productivity initiatives (see above),
• the age and job-skill coefficient (GVT),
• increasing the skills of library staff (with an upward trend in the ABC pyramid job structure model..

7.4.3. Material expenditure: the situation in France is below the European average with an increase that is not in keeping with the increasing student population

(I17. Material expenditure / (student + teacher-researchers))



(I18. Material expenditure / Total expenditure (including salaries and wages))



Notes on the data

While the indicator is based on the number of students and the number of teacher-researchers, it is important to bear in mind that in the case of material expenditure, the greatest share of expenditure is for electronic resources (see below) that are largely used by teacher-researchers.
NB: Due to an underestimation of the number of teacher-researchers in France (see 7.1.3), the French indicator may be slightly overestimated (teacher-researchers currently only account for 4% of the number of students).

Values for 2016

In terms of material expenditure per student, France is clearly below the European average: €62 of material expenditure per student + teacher-researcher versus €158 on average (€138 outside of Switzerland), with expenditure for the other major countries as:
• Germany: €127 per student,
• The United Kingdom: €175 per student,
• Spain: €58 per student.
This situation is reflected in the indicator of the share of material expenditure in the total library expenditure, where France spends proportionally less on materials than the other countries:
• 24% in France;
• 31% on average in Europe;
• 33% in Germany,
• 42% in the United Kingdom.
It is impossible to analyze variance at this stage to determine if these differences stem from acquisition costs (numbers of print volumes), average unit costs, or the weight of staffing expenditure.

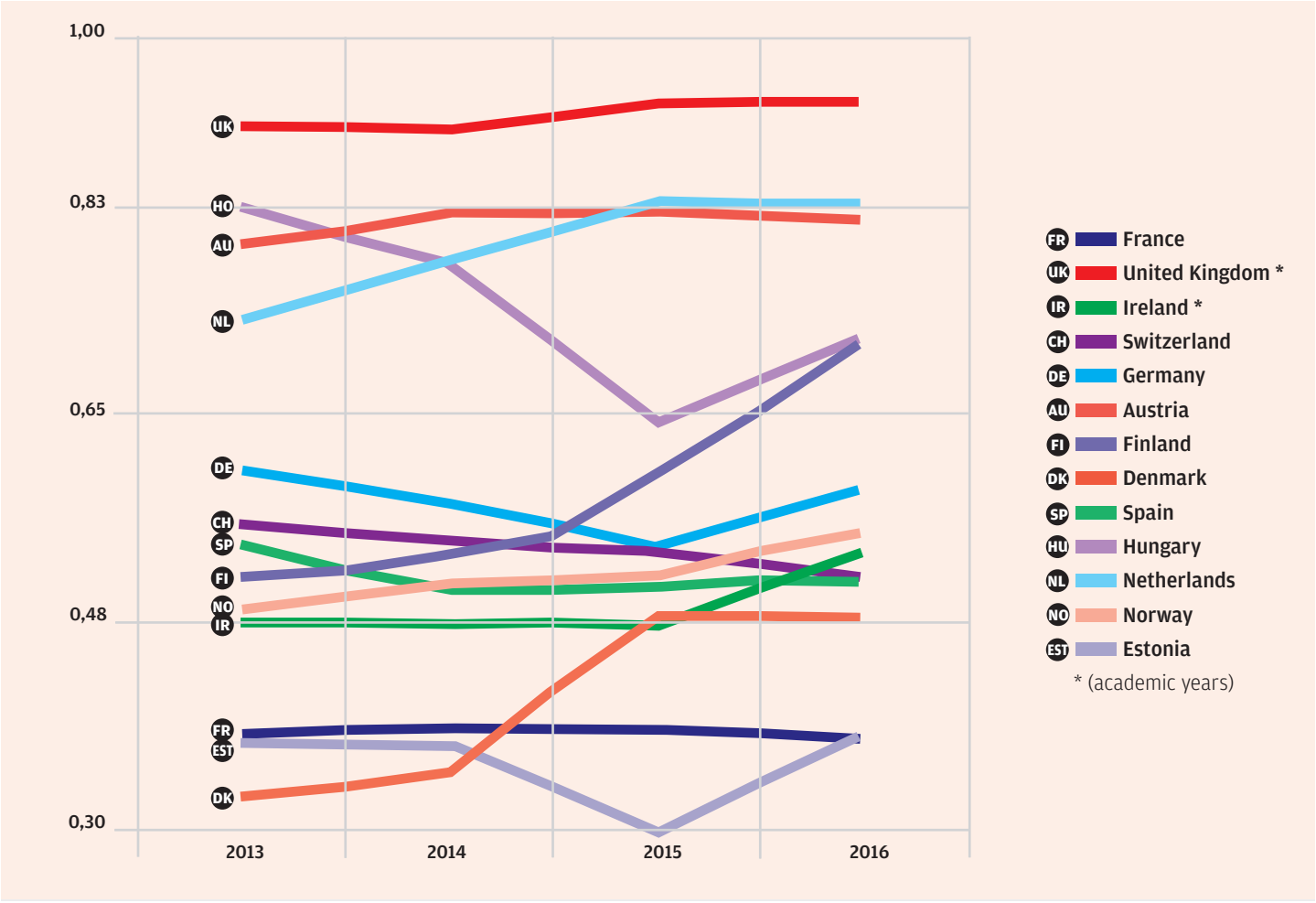
Trends for 2013-2016

Due to the increase in the number of students, **material expenditure per student in France is currently decreasing** by 5%, despite a 3% increase in total material expenditure. In Europe, it increased by 5.7% (+10% excluding Switzerland).

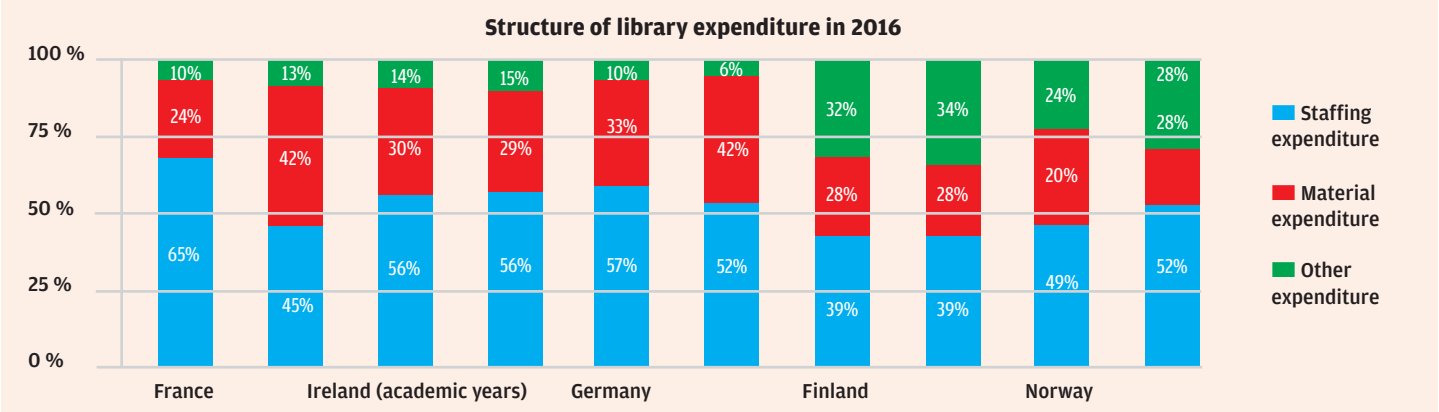
The share of expenditure on materials in total expenditure decreased slightly in Europe but remained stable in France.

7.4.4. Ratio of material expenditure to staffing expenditure: much lower in France

(I25. Material expenditure / staffing expenditure)



Material expenditure and staffing expenditure in total expenditure



Values for 2016

As shown above, France spends proportionally less on materials than the other study countries. This is most visible in the indicator for France which is well below the European average:

- **Ratio of 0.37 for France** (€1 staff costs = €0.37 material costs),
- **European average of 0.61** (€1 staff costs = €0.61 material costs),
- Ratio of 0.58 for Germany,
- Ratio of 0.94 for the United Kingdom,
- Ratio of 0.52 for Spain.

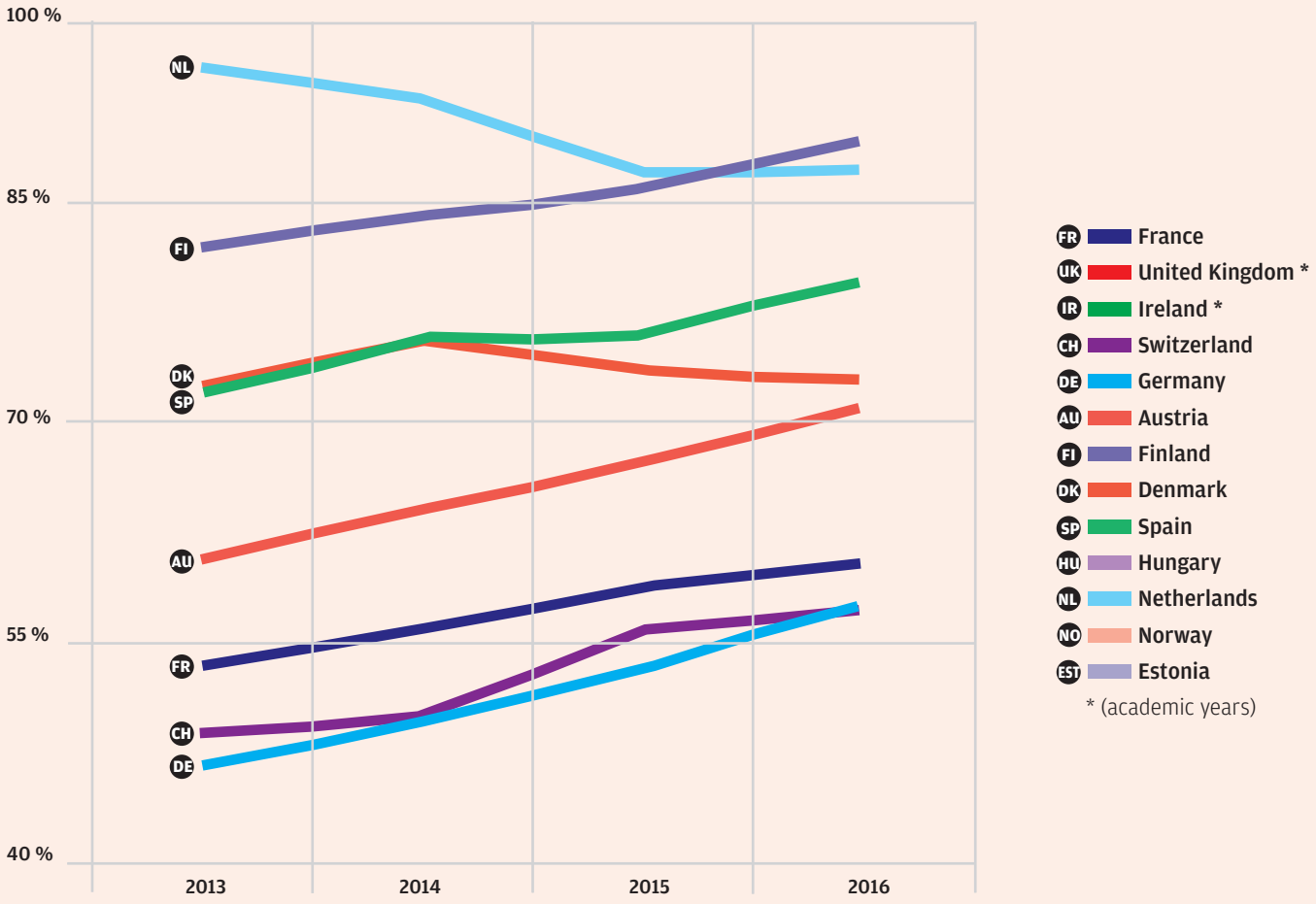
France therefore spends proportionally 2.7 times more on staff than on materials.

Trends for 2013-2016

This downward trend is becoming even more pronounced in France (-1,2%), while material expenditure is progressively increasing in Europe (+6%).

7.4.5. Electronic resources represent an increasingly important component of libraries' material expenditure, particularly in France

(I19. % of material expenditure on electronic resources)



Notes on the data

In France, expenditure on electronic materials includes the cost of a national license for Elsevier.
Data on electronic material expenditure are not available for the United Kingdom.
It would also have been interesting to relate expenditure on electronic periodicals (or electronic books) to the average number of periodical titles (or electronic books) per institution to reach an average cost per title.
Data on the average number of titles per institution are generally available but were not considered sufficiently

consistent across all countries to be included in the analysis. In the same way, the results of a test scenario where the indicator was calculated using the average cost per title were not sufficiently conclusive given the observed differences and were excluded from the study.
Finally, these data are obviously clearly linked to each country's publishing situation, which was not analyzed in the context of this study.

Values for 2016

While the proportion of material expenditure dedicated to electronic material is high in France (62%), it remains below the European average (73%).
It is still slightly higher than in Germany (59%). Germany, however, spends nearly 2.8 times more than France in absolute terms andis, of all countries, the country with the highest material expenditure (and consequently the highest electronic material expenditure) .
It should be noted that electronic expenditure represents 81% in Spain, 88% in the Netherlands, and as much as 92% in Finland.
Naturally, as a sub-category of electronic materials, the share of electronic periodicals is dominant (74% in France vs. 64% on average), with the share of electronic books remaining at roughly 7% (both for France, and on average), whereas Germany dedicates 13% of electronic material expenditure to electronic books.

Trends for 2013–2016

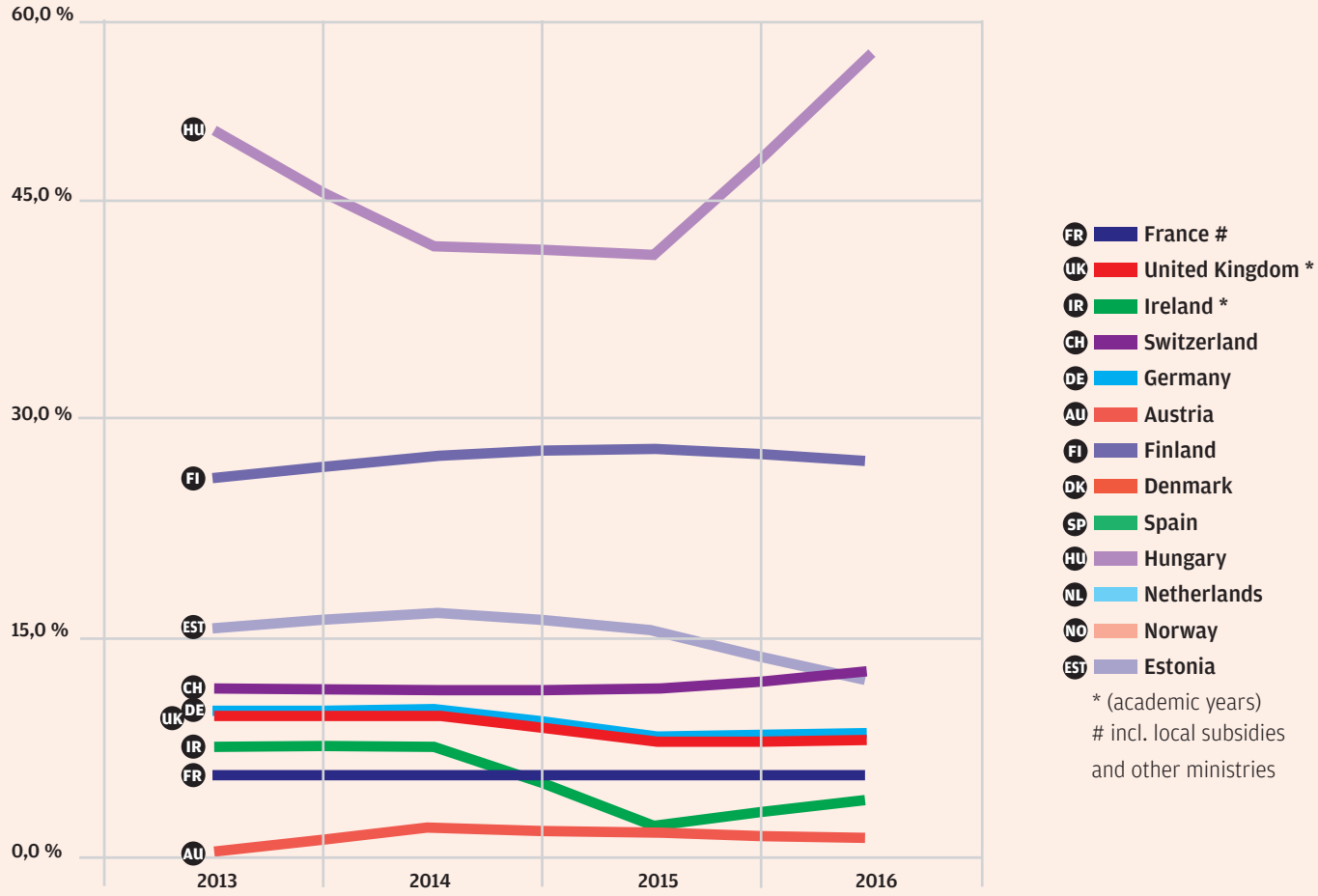
The share of electronic material expenditure in the larger category of material expenditure increased significantly (17%), which is higher than the European average (10.3%), but lower than that of Germany (28.2%).
Note that spending on electronic material decreased in the Netherlands between 2014 and 2015 but from surprisingly high rates: from 94% to 88%.
Material expenditure on electronic journals increased substantially in France (+33%), and slightly less so for electronic books (+14.2%), at rates that exceed the European growth rate.

Points for reflection

This indicator requires further investigation.

7.4.6. Leverage of external funding sources or support by the supervising ministry: very partially activated in France

(I21. % of library budget income not provided by the institution or the supervising ministry (local authority subsidies or the library's own resources))



Values for 2016

Only 5.6% of library revenues in France come from sources other than the institution or the supervising ministry. This is lower than the European average (15%) and notably lower than both Germany (8.7%) and the United Kingdom (8%).

Trends for 2013-2016

The rate has remained more or less constant in France and Europe while it is lowering in the United Kingdom (-17.5%) and Germany (-7.7%), **which certainly reflects the general level of difficulty associated with activating this leverage.**

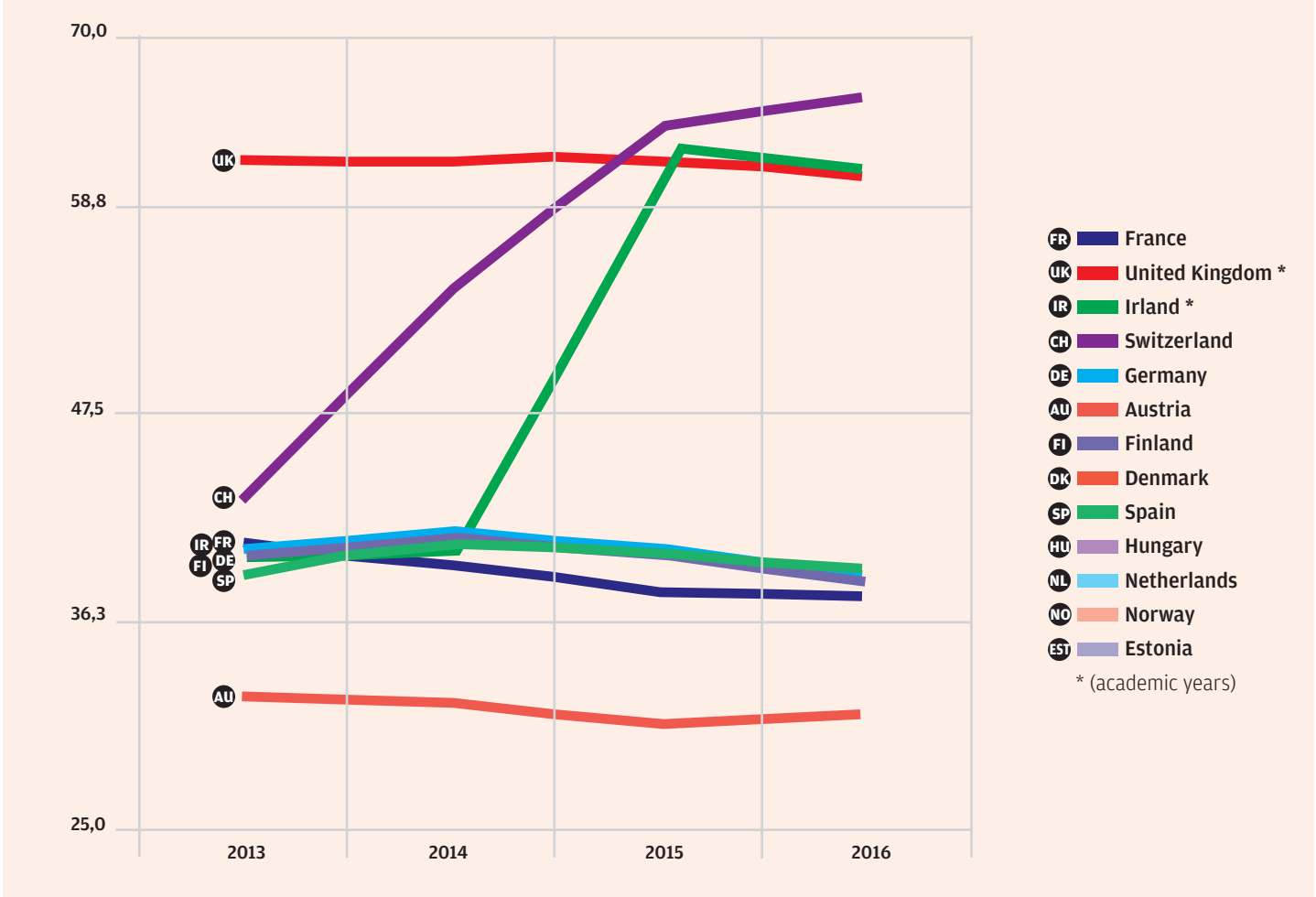
Points for reflection

This indicator requires further investigation to explore the range of sources available in other countries (e.g. Finland).

7.5. Physical library use

7.5.1. Visits to physical libraries: the number of visits is slightly decreasing, especially in France

(I4. Number of physical library visits / Number of students)



Notes on the data

This indicator is to be used with caution since the methods of measuring physical visits can vary. For Switzerland and Ireland, a good portion of the data is partial. Moreover, it is worth recalling that libraries with a high attendance rate paradoxically generate more visits than those with a low attendance rate because the length of the stay is shorter (and with greater user dissatisfaction).

Values for 2016

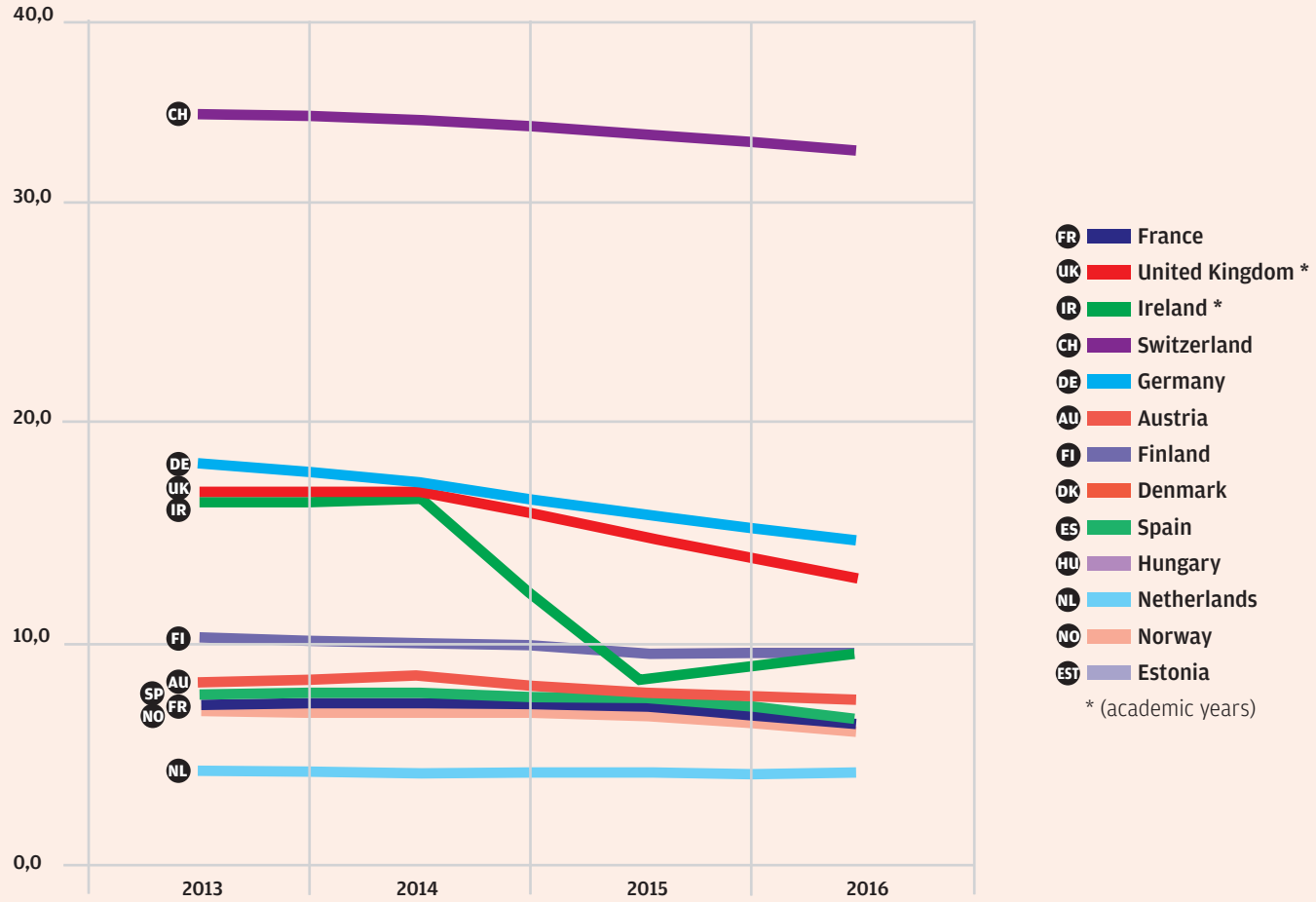
The number of physical visits per student in France is lower than the European average: 38.5 visits per year versus 47.9 visits per year (and 60.3 visits per year in the United Kingdom). This difference between library use in France and the United Kingdom has also been found in the LIBQUAL surveys.
By contrast, French library attendance is closer to that of Germany (39.7 visits per year) and Spain (40.6 visits per year).

Trends for 2013-2016

The number of physical library visits by students is decreasing in France (-7.2%), and **while the total number of physical library visits is increasingly slightly** (+1%), a similar rate of decline is also occurring in Germany (-2.8%) and the United Kingdom (-1.4%). The overall rate of increase is +12.2%.
Data from the 2017 ESGBU, however, show a substantial increase in library attendance.

7.5.2. Loans of printed books: has decreased appreciably, especially in France

(I8. Number of loans of printed books / Number of students)



Values for 2016

The number of loans per student in France (6.5 loans per year) is lower than in Switzerland (33.6), Germany (13.7) and the United Kingdom (11.9) and at the same level as in Spain (6.6).

Trends for 2013–2016

Above all, the circulation of printed books is steadily decreasing, to varying degrees, in all of the study countries:

- For France, this decline (-12.6%) is less pronounced (slower) than the European average (-16.1%),
- In the United Kingdom (-23.9%), Spain (-20.3%) and Germany (-19.6%), **the decline is considerably worse.**

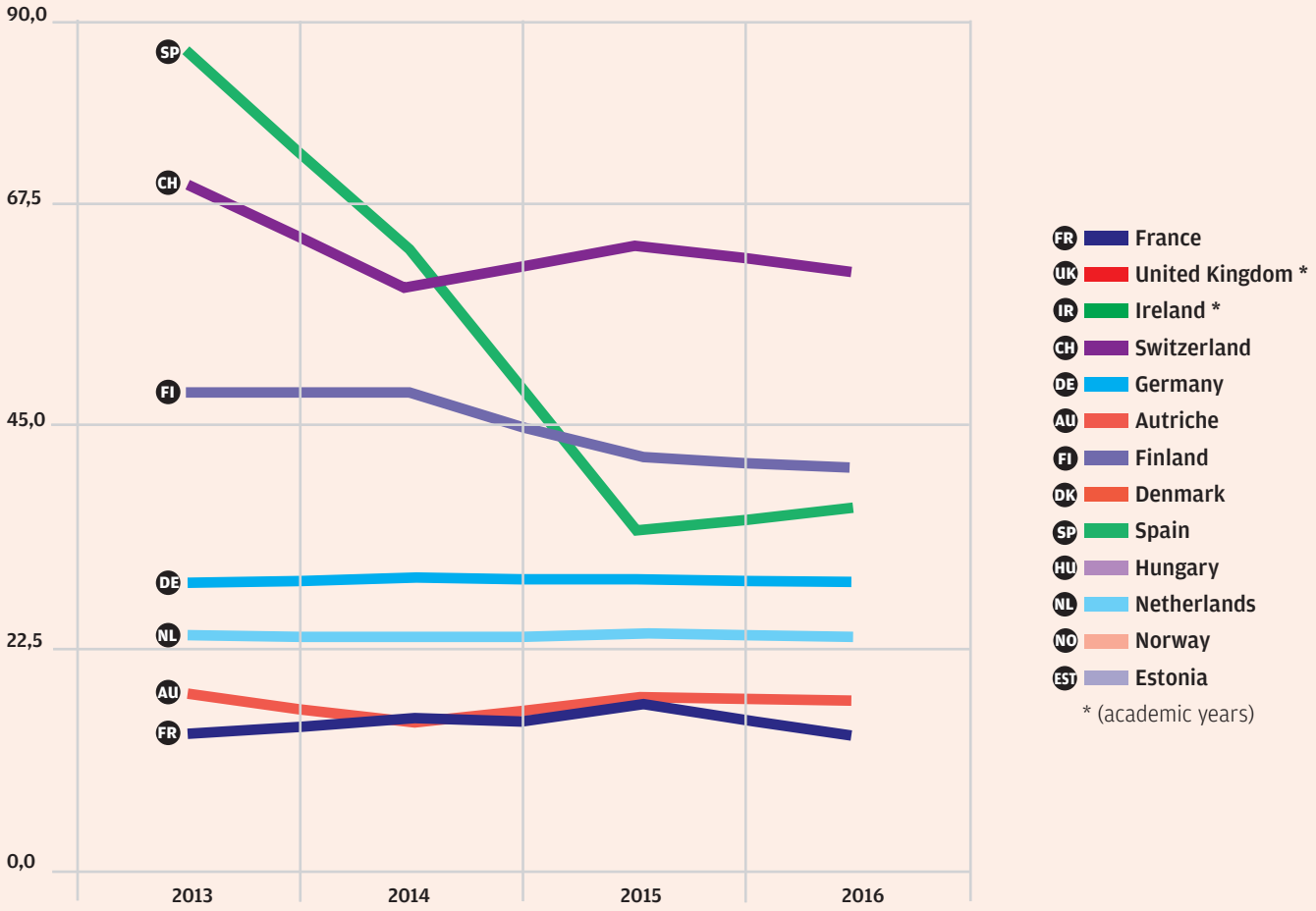
Points for reflection

These trends should naturally be considered in the context of expanding library services and use of digital collections. Despite the absence of data specific to on-site consultation of books and other printed material, the downward trend in loans of printed books will, in the long term, likely lead to a gradual reduction of surface area normally designated for collections presentation as libraries convert these spaces into work areas (for individuals and groups).

7.6. Virtual library use

7.6.1. Virtual library visits: it is difficult to collect reliable data

(I5. Number of virtual library visits / Number of students)



Notes on the data

This indicator should be used with extreme caution as methods for measuring virtual visits vary considerably for each country (library website visits, connections, session duration, online public access catalog [OPAC] home page visits, etc.), wherever they come from (distant access or onsite access).
Data to support this indicator were not available for the United Kingdom and were not measured in Germany for 2016. Data for Spain need further inquiry to check the validity of a sharp drop observed for 2014-2015.

Values for 2016

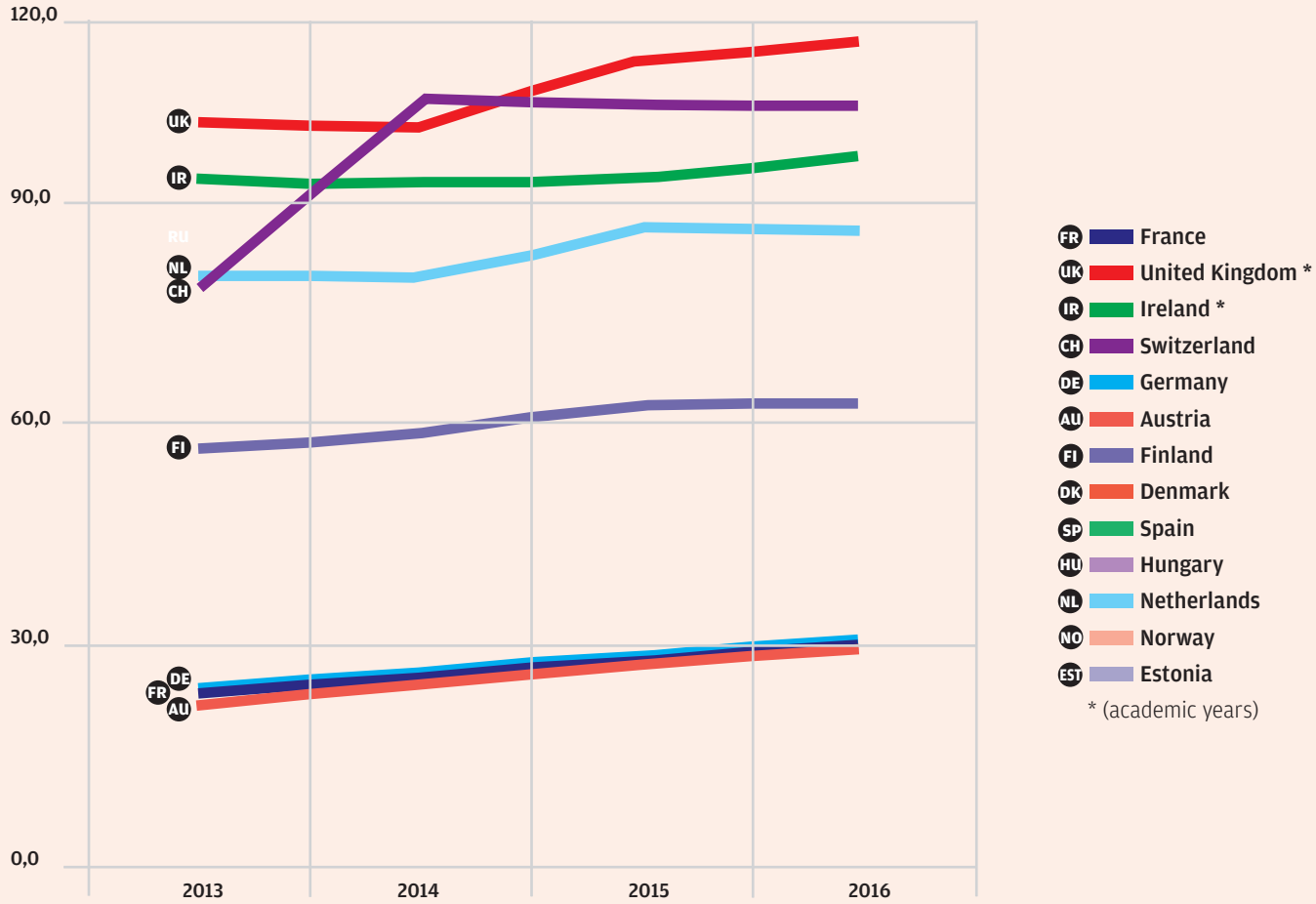
In 2015, websites in Spain (34.2 visits per year) and in Germany (31.2 visits per year) were consulted twice as much as French library websites (15 visits per year), whereas visits for Switzerland were appreciably higher (63 visits per year). A pertinent question is whether the comparatively low number of visits in France reflects the quality of French library websites or differences in use between countries.
It is tempting to reconcile data on the ratio of virtual and physical visits, which for France is 1 virtual visit for 3 physical visits. In practice, the two types of uses serve complementary purposes and pose no real conflict: the more frequently a user visits the library's physical premises, the more likely they are to consult the library's website (especially when on-site).

Trends for 2013-2016

In the current situation, deciphering these trends in virtual visits is difficult; if a downward trend can more or less be observed , to what degree is this influenced, for example, by mobile phone use? And should this be factored into library website use?
In France, the number of virtual visits increased during the 2013-2015 period, but showed a significant decrease in 2016.

7.6.2. Consultation of electronic journals: in France, use is below average but is increasing significantly

(I9. Number of electronic journals consulted / Number of students and teacher-researchers)



Notes on the data

Electronic journal consultation is not monitored in Spain and has not been monitored in Switzerland since 2015. Comparison between the study countries with regard to this indicator requires extreme caution as consistency in terms of methods of measurement cannot be guaranteed for all countries (i.e. successful searches, views/consultations, and downloads of partial or full databases), notably France.

- Most of the publishers of electronic journals are COUNTER compliant, which allowed us access to data from the JR1 report on usage of full-text articles. This is not, however, the case for all publishers and consequently resulted in relative heterogeneity of the data.
- The JR1 report does not concern the full scope of journal subscriptions, including publishers' open access titles or those which offer limited access, etc.

Values for 2016

The number of articles consulted per person (student + teacher-researchers)

- **in France is 28.9 articles per year,**
- which is roughly the same in Germany: 30.6 articles per year,
- **but well below the European average of 70.7 articles per year,**
- of which the United Kingdom has the highest numbers: 116.5 articles per year.

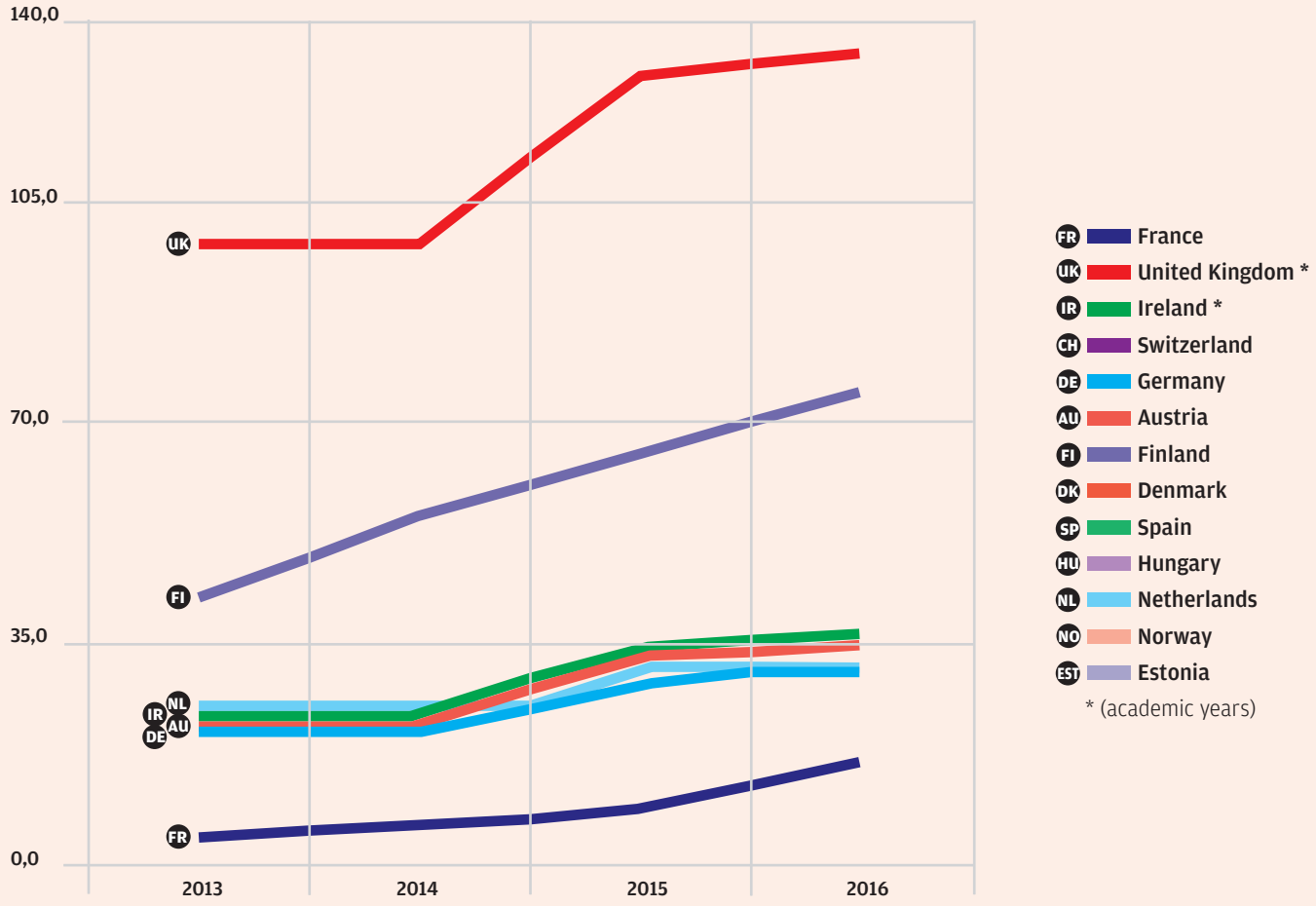
The fact that the English language is the predominant language of consulted content may represent a barrier in France. Variations in use between France and the UK have also been measured using LIBQUAL survey data.

Trends for 2013-2016

We noted a clear and significant overall upward trend:
- +23% in France, +29% in Germany,
- +16.7 on average for Europe,
- +10.8% in the United Kingdom, where consultation is the highest among all countries.

7.6.3. Consultation of electronic books: in France, use is below average but is increasing very significantly

(I10. Number of electronic books consulted / Number of students and teacher-researchers)



Notes on the data

This indicator is not monitored in Spain or in Switzerland.
Caution should be used in comparing this indicator across countries as the response options may vary from country to country (views/consultations, downloads at the E-book level or by section).
The United Kingdom and Ireland measure consultation of electronic books by chapters or sections rather than by title, which means that this indicator will naturally be comparatively stronger than the other countries.

Beyond data heterogeneity across countries lies a fundamental problem at the operational level , namely some inconsistency in the data collection processes themselves: where in the UK and Ireland numbers of pages are added to the total number of chapters, titles and sections, data for France are provided by publishers and generally consist of titles and book sections.

Values for 2016

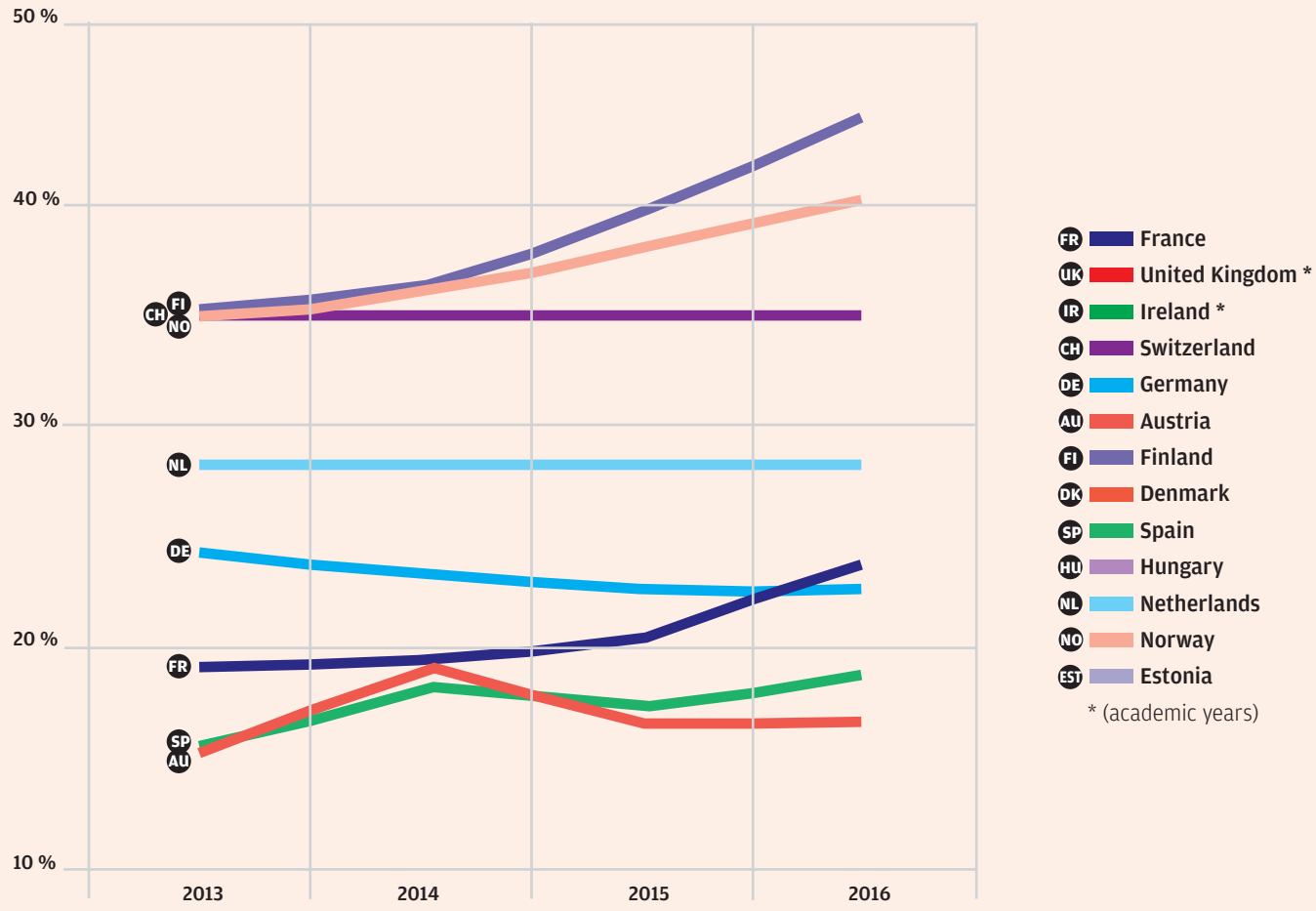
The number of electronic books consulted per person (student or teacher-researcher)
- **in France is 17.5 ebooks per year,**
- which is less than in Germany: 29.6 ebooks per year,
- **and substantially less than the European average of 51 ebooks per year,**
- where the highest consultations are in the United Kingdom: 131.7 ebooks per year.

Trends for 2013-2016

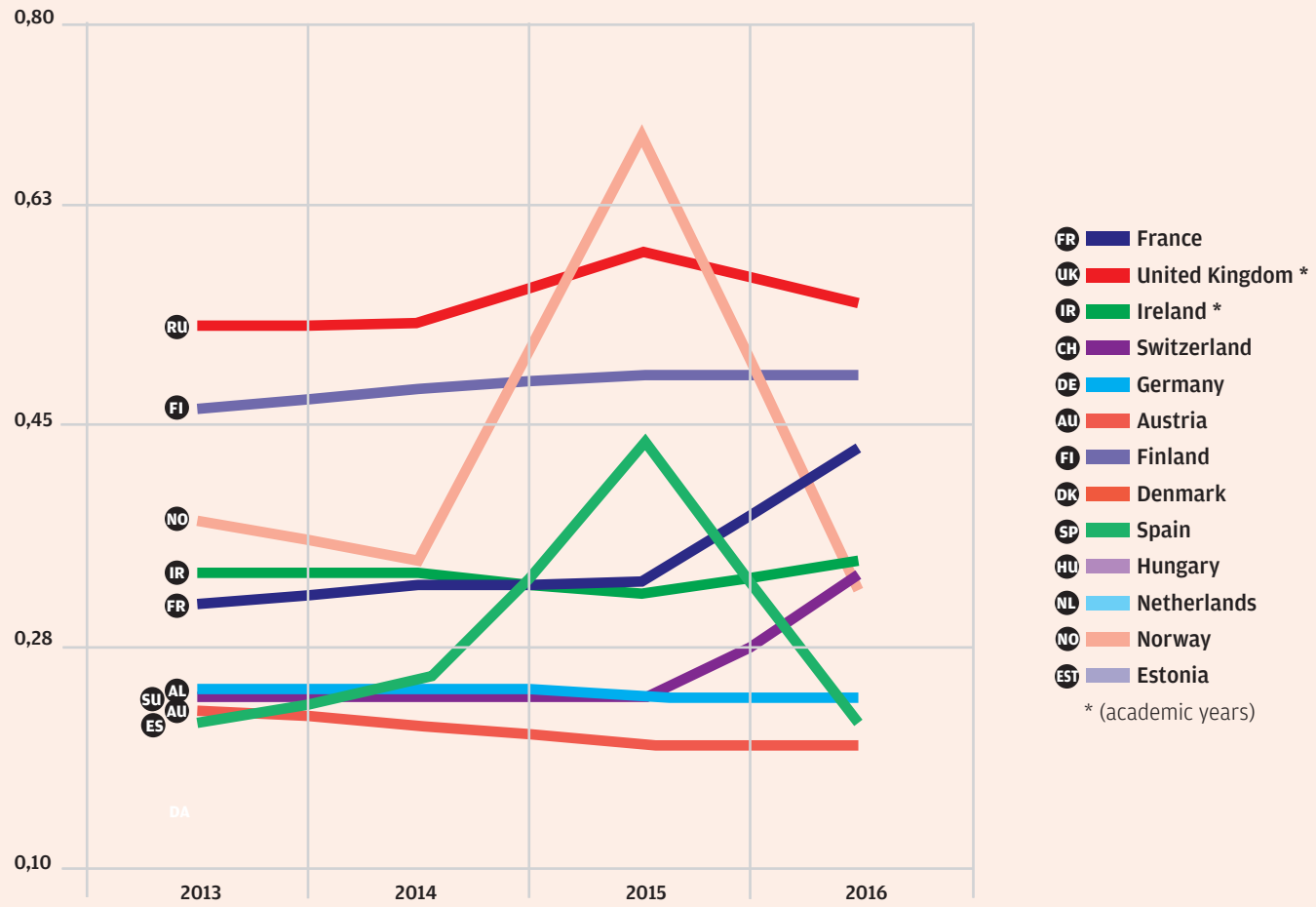
This indicator shows a substantial overall upward trend, mainly ascribable to the increasing numbers of electronic books being published, which is particularly strong in France:
- +194% in France,
- +49.6% in Germany,
- +53.7% on average for Europe,
- +37.7% in the United Kingdom, where consultation is the highest in Europe.

7.7. User training: an activity in real development, particularly in France

(16. Number of students participating in user training / Number of students (%))



(I7. Number of hours of user training provided / Number of groups of 10 students)



Notes on the data

Data on the percentage of students participating in training were not available for the United Kingdom or Ireland.
NB: It is unknown if this is because data for these countries do not distinguish between students enrolled in training programs (where a degree of absenteeism would be expected) and those students who actively participated in training.
With regards to the number of hours of training per student, the data for Spain (2015) and Norway (2015) may need to be double checked to verify if reported peaks for both countries were normal.

Values for 2016

The % of students who participated in training:
- **in France is 24%,**
- **which is slightly below the European average of 29%,**
- but just over values reported for Germany (22%) and Spain (19%),
- with the maximum of 45% in Finland.

The number of hours of training provided per group of 10 students:
- **in France is 0.43,**
- **which is slightly higher than the European average of 0.34,**
- and just over values for Germany (0.22) and Spain (0.19),
- with the maximum of 0.55 in the United.

Trends for 2013-2016

For the percentage of student participation in training programs, a significant overall increase was observed:

- +11.6% on average,
- **particularly in France** (+26.4%),
- with a decrease observed in Germany (-7.5%).

For the number of hours of training provided per group of 10 students, an overall increase was also observed:

- +7% on average,
- **particularly in France** (+36.4%),
- with a decrease observed in Germany (-0.8%).

8. A summary of the French situation on key indicators

While we observed an increase in the number of students all over Europe, the increase in France was particularly substantial (+8.8% over the 2013-2016 period for the study institutions). This trend is expected to continue in the coming years, which will undoubtedly increase the pressure on French university library resources.

With regard to physical libraries, a wave of new constructions through 2015 allowed France to produce improved indicators in terms of surface area of library premises designated for student use, or student seating places. The dynamics of the situation changed in 2016 as a direct result of a surge in the student population.

In terms of two indicators invariably linked, namely libraries' weekly and annual opening hours (days open) and numbers of library staff (FTEs per student), French libraries are noticeably behind other European countries. The "open libraries" initiative consisting in offering a combination of hours staffed with professional librarians and hours with self-service, should produce visible results as early as 2017 or 2018.

The relative lag observed in France compared to the European average (i.e. the average of the indicators for the 13 study countries) is particularly obvious in the budgets devoted to the libraries themselves (total expenditure, staff expenditure and materials expenditure per student), bearing in mind that these budgets are increasing slightly in absolute terms.

One characteristic that stands out for the French situation can be seen in the significantly lower share of materials expenditure in relation to staff expenditure or total expenditure of the other countries. A deeper analysis would be required to determine why, certainly one that takes into account each country's publishing situation, costs of labor and the structure of the job market.

One area where the situation in France is markedly more favorable, but where there is still room for improvement, is in the amount of training available to student users and professional training for staff (FTE).

In terms of changes in library use, the situation in France largely follows trends observed across the study countries, notably a decline in the percentage of students who borrow printed books and a sharp increase in consultation of electronic periodicals and books per student.

France remains below the European average for specific library use indicators: visits per student to physical libraries (down in France over the four-year study period, with a slight rise observed in 2017), the percentage of students who borrow printed books, and the number of students who consult electronic journals and books (these same trends appear in results from several LIBQUAL surveys).

This observation is most certainly best explained when viewed through the lens of integrating library services into higher education institutions' teaching and curriculum development. The role of libraries in education is being strengthened in France but is currently a good deal more developed in other European countries. The frequency in France of electronic resources consultation is very likely influenced by their purpose in research, and in this context, by the fact that a vast majority are published in English – which might also explain why French students use this resource less than elsewhere.

The initial findings presented in this study should be updated in the coming years in cooperation with our European partners (ideally as soon as 2018 with data from 2017). Updates using more enriched indicators with greater consistency and comparability across countries will allow for a clearer assessment of how, and to what degree, libraries contribute to overall student success and to the research performance of institutions.

> Key:

French Situation	Above the European average (or more favorable)	Below the European average	At the same level as the European average

Trends for 2013-2016: ↗Increase ↗↗Strong increase ↘Decrease ↘↘Strong decrease →Stability
ST = student; **TR** = Teacher-Researcher

Values and Trends	Comparability	France (study institutions)	Average of the study countries (13)	Germany	United Kingdom
Library target population					
D0. Population	■	66 million ↗+1,8%	Total: 327 million ↗+1,6%	82 million ↗+2,1%	66 million ↗+2,3%
D1. Students	■	1,7 million ↗+ 8,8%	Total: > 9 million ↗ (NC 3 countries)	2,4 million ↗+7,8%	1,9 million ↗+1,1%
I0. % of students in the population	■	2,5% ↗+ 6,9%	2,9% (N/A 3 countries) ↗+2,5%	3% ↗+ 5,6%	3% →-0,5%
Physical libraries					
I1. Surface area for users / per student	■	0,45 m² / **ST** ↗+5,6%	0,46 m² / **ST** →+0,1%	0,42 m² / **ST** →-0,4%	N/A
I2. No. students / seating place	■	10,1 **ST** / place ↘-3,1%	13,5 **ST** / place →+0,1%	19 **ST** / place ↘-4,5%	9,7 **ST** / place ↘-5,4%
D15. Opening hours / per week (main library)	■	59 hrs / week (libr. > 100 places) →+0,8%	67,5 hrs / week ↗+7,7%	70 hrs / week + ↗+2,3%	N/A
D16. Days open / per year (main library)	■	235 days / year (libr. > 100 places) →-1,1%	266 days / year →+0,1%	290 days / year ↗+1,5%	N/A
Library human resources					
I3. Number of staff (FTE) / 1000 students	■	3,8 FTE / 1000 **ST** ↘-6%	5,0 FTE / 1000 **ST** ↘-5,3%	4,9 FTE / 1000 **ST** →-0,6%	5,1 / 1000 **ST** →+0,2%
I20. Number of days of training / year / staff (FTE)	■	3 days / year / FTE ↗+4,6%	2,8 days / year / FTE ↘-8,5%	2,5 days / year / FTE →-0,6%	N/A
Library expenditure					
I13. Total expenditure / per student	■	272 € / **ST** ↘-5,3%	503 € / **ST** ↗+1,3 (excl. CH)	403 € / **ST** ↘-1,1%	450 € / **ST** ↗+3,7%
I16. Staff expenditure / per student	■	178 € / **ST** ↘-4,2%	232 € / **ST** →-0,7% (excl. CH)	230 € / **ST** →+0,3%	202 € / **ST** ↗+2,7%
I17. Material expenditure / (ST+TR)	■	62 € / (**ST + TR**) ↘-5%	138 € / (**ST + TR**) ↗↗10% (excl. CH)	127 € / (**ST + TR**) ↘-2,4%	175 € / (**ST + TR**) ↗+5,4%
I18. % Material expenditure / total expenditure	■	24% →	31% ↘-2,2%	33% ↘-1,2%	42% ↗+2%

Values and Trends	Comparability	France (study institutions)	Average of the study countries (13)	Germany	United Kingdom
Library expenditure (afterpart)					
I25. Material expenditure / staff expenditure	■	0,37 ↘-1,2%	0,61 ↗+6%	0,58 ↘-2,6%	0,94 ↗+3%
I19. % Material expenditure on electronic resources	■	62% ↗↗+17%	73% ↗↗+10,3%	59% ↗↗+28,2%	N/A
I21. % Budget income not provided by the Institution of supervising Ministry	■	5,6% →-0,3%	15% →-0,7%	8,7% ↘-7,7%	8% ↘-17,5%
Physical library use					
I4. Number of visits / per year / per student	■	38,5 visits / year / **ST** ↘-7,2%	47,9 visits / year / **ST** ↗+12,2%	39,7 visits / year / **ST** ↘-2,8%	60,3 visits / year / **ET** ↘-1,4%
I8. Number of book loans / per year / per student	■	6,5 loans / year / **ST** ↘↘-12,6%	11,6 loans / year / **ET** ↘↘-16,1%	13,7 loans / year / **ST** ↘↘-19,6%	11,9 loans / year / **ST** ↘↘-23,9%
Virtual library use					
I9. Number of electronic journal articles consulted / per year / (ST+TR)	■	28,9 articles / year / (**ST+TR**) ↗+23%	70,7 articles / year / (**ST+TR**) ↗↗+16,7%	30,6 articles / year / (**ST+TR**) ↗↗+29%	116,5 articles / year / (**ST+TR**) ↗↗+10,8%
I10. Number of Ebooks consulted / per year / (ST+TR)	■	17,5 Ebooks / year (**ST+TR**) ↗↗+194%	51 Ebooks / year / (**ST+TR**) ↗↗+53,7%	29,6 Ebooks / year / (**ST+TR**) ↗↗+49,6%	131,7 Ebooks / year / (**ST+TR**) (sections) ↗↗+37,7%
Formations usagers					
I6. % of students participating in training	■	24% ↗↗+26,4%	29% ↗↗+11,6%	22% ↘-7,5%	N/A
I7. Number of hours of training / per 10 students	■	0,43 hrs ↗↗36,4%	0,34 hrs ↗+7%	0,22 hrs →-0,8%	0,55 hrs ↗+3,7%%

9. Proposed actions for 2018

Insofar as the present study has demonstrated that there is a need for a European-wide framework for measuring the performance of university libraries, as the relevance of our analyses confirms, further steps clearly need to be taken to improve the overall reliability of the results.

Our proposals for follow-up action in 2018 are as follows:

1. Organize the network of partners	- Develop collaboration between countries based on either direct bilateral contact between France and each country, and/or through international associations (EBLIDA, IFLA, LIBER). - Identify and involve lead partners per country.
2. Integrate other countries	- Integrate data from Sweden (once translated) - Retrieve (if available) data from other countries with large populations: prioritizing Italy and Belgium, but also including Greece, Portugal, Poland, Romania and the Czech Republic. - Optional: Integrate Canada (CARL and BU Québec) for a broader European / Canadian perspective.
3. Review the types of libraries	- Conduct a detailed review with each partner of the typology of the ULs to select libraries to be excluded (possibly national libraries) or those that should be included (Grande École libraries or special libraries)
4. Retrieve all student data	- Retrieve data from certain countries (Hungary, Denmark, Estonia), while ensuring that institutions deliver consistent data related to students and libraries (work to be conducted in France)
5. Review common data and indicators	- Work with each partner to determine if new common indicators can be constructed, if necessary with new data to be produced by each of the countries. - Give particular attention to studying the status of print collections.
6. Review data consistency	- Work with each of the partners to confirm or establish precise definitions of common data, compliant with international standards (ISO2789, ISO 11620) and common initiatives (COUNTER) - Fully translate the glossaries (for Spain, Germany and Sweden) into both French and English, to ensure consistency. - Modify the financial data for each country by using indices on cost levels (labor, material resources).
7. Review data quality	- Conduct a full review with each partner to resolve inconsistencies or problems concerning the data.
8. Collect data for 2017	- Collect all data for 2017 that are available online in XLS file format, save for some exceptions (France, SCONUL). - Collect data from the Netherlands in XLS file format (currently in pdf). - Collect 2016 data for the Netherlands and Denmark.
9. Better equip the mechanism	- Work collectively with all the partners to develop and implement an online database that can be supplied by raw XLS data feeds from each country on an annual basis. Priority should be given to ensuring ease of access and, second, to producing robust indicators (standard common indicators or specific context indicators) - Implement query tools with data-notification functions. - Promote maximizing availability of institution data to enable the institutions to establish an inter-institutional European benchmark (same size, type and discipline, etc.).
10. Cross-reference with other indicator sources	- Enhance analyses with other major international surveys (e.g. LIBQUAL).

10. Annexes

10.1. Annex 1: Relationship between common study data and standard ISO2789 data

	Selected common data	Associated or similar ISO2789 data
D0.	Country population	Not applicable
D1.	Institution students	Not applicable
D2.	Teacher-researchers and academic staff of the Institution	Not applicable
D3.	Loans of printed books (excluding extensions / renewals)	2.2.19 Loan: direct lending or delivery transaction of an item in non-electronic form (e.g. book), of an electronic document on a physical medium (e.g. CD-ROM) or other device (e.g. eBook reader), or transmission of an electronic document to one user for a limited time period (e.g. eBook)
D4.	Physical visits	2.2.40 Visits
D5.	Virtual visits	6.2.13 Virtual visits
D6.	Consultation of electronic journals	No equivalent: see COUNTER JR1
D7.	Consultation of electronic books	No equivalent: see COUNTER BR1, BR2
D8.	User training	6.2.11c User orientation and training / number of total hours libraries dedicate to user training related to collections presentation, library services and equipment or use of information resources.
D9.	Hours dedicated to user training	6.2.11b User orientation and training / number of users participating in training sessions
D10.	Total surface area (m2)	6.4.8.3 Gross floor area of library buildings
D11.	Surface area for public use	6.4.8.2a Net usable area by function / public services 6.4.8.2d Net usable area by function / events
D12.	Seats available for users	6.4.3 User places
D13.	Group study areas	-
D14.	No. of computer work stations for users	6.4.4 Public access work stations
D15.	Main library opening hours per week (normal period)	6.4.1a Opening hours / during an ordinary week / at the central/main library
D16.	Main library days open per year	6.4.2a Days open during the reference period / at the central/main library
D17.	Library staff (FTE))	6.7.2b Professional staff / number of employees (full time equivalent, FTE)
D18.	Staff training (days per year)	6.7.4a Staff training / number of hours of staff training provided as part of a traineeship (during the reference period)
D19.	Electronic journals and periodicals available	2.3.19 eBook / electronic book Non-serial digital document, licensed or not, where searchable text is prevalent, and which can be equated with a print book (monograph) • Periodicals available in local collections • Remotely accessible resources for which temporary or permanent access rights have been granted • Digitized periodicals Not included: Open Access journals

	Selected common data	Associated or similar ISO2789 data
D20.	Electronic books available	2.3.19 eBook / electronic book Non-serial digital document, licensed or not, where searchable text is prevalent, and which can be equated with a print book (monograph) • Doctoral dissertations in electronic format are included. • Documents digitized by the library are included.
D21.	Total institutional expenditure	Not applicable
D22.	Total library expenditure	By adding the types of expenditure identified in: 6.6.1 Operating (ordinary) expenditure • Employees • Acquisitions • External document supply and interlibrary lending • Premises • Information technology • Open access publishing fees • Miscellaneous 6.6.2 Capital expenditure
D23.	Library staffing expenditure	6.6.6.1 Expenditure for employees
D24.	Library material expenditure	6.6.1.2 Acquisitions expenditure 6.6.1.3 External document supply and interlibrary lending expenditure 6.6.1.4 Collection maintenance expenditure
D25.	Library electronic material expenditure	6.6.1.2 Acquisitions expenditure • Databases • Electronic serials • Digital documents (excluding ebooks) • Ebooks
D26.	Library electronic journal expenditure	6.1.2 Acquisitions expenditure / electronic serials
D27.	Library electronic book expenditure	6.1.2 Acquisitions expenditure / electronic books
D28.	Total library budget income	6.6.3 Income and funding • Funding from the library's own institution or supervising authority • Funds from other public sources • Funds from corporate and private sources (including donations) • Special grants • Income generated, i.e. The income generated by library operations and by fees, charges, subscriptions and donations, that is available to the library for spend
D29.	Library income from the institution or governing organization	6.6.3 Income and funding / funding from the library's own institution or supervising authority
D30.	Internal revenue, membership fees or other local sources (excluding grants)	6.6.3 Income and funding / income generated, i.e. the income generated by library operations and by fees, charges, subscriptions and donations, that is available to the library for spending

10.2. Annex 2: Relationship between common study indicators and standard ISO11620 indicators

N°	Common indicators proposed by the study	Associated or similar ISO 11620 indicators
I0.	Number of students (enrolled in the study institutions) / Country population (%)	Not applicable
I1.	Surface area for users / per student	B1.3.1 Areas provided for use by individual users
I22.	Total surface area / Number of students (non-priority)	-
I2.	Number of students / Number of seating places	B1.3.3 Study places per person
I3.	Number of staff (FTE) / 1000 students	B1.4.1 Employees / 1000 people to be served
I23.	Number of computer work stations for users / Number of seating places (non-priority)	-
I24.	Number of group study areas / Number of seating places (non-priority) (%)	-
I4.	Number of physical library visits / Number of students	B2.2.1 Visits of individual users
I5.	Number of virtual library visits (visits to the library website) / Number of students	-
I6.	Number of students participating in training / Number of students	B2.2.5 Number of individual users participating in training sessions
I7.	Number of hours of training for users / Number of tens of students	-
I8.	Number of printed book loans / Number of students	-
I9.	Number of electronic journals consulted / Nombre d'étudiants et d'enseignants-chercheurs)	-
I10.	Number of electronic books consulted / Number of students and teacher-researchers	-
I11.	Total library expenditure (excluding salaries and wages) / Number of students	B3.4.1 Cost per user
I12.	Total library expenditure (excluding salaries and wages) / Number of students and teacher-researchers	B3.4.1 Cost per user
I13.	Total library expenditure (including salaries and wages) / Number of students	B3.4.1 Cost per user
I14.	Total library expenditure (including salaries and wages) / Number of students and teacher-researchers	B3.4.1 Cost per user
I15.	Total library expenditure / Total institution expenditure (%) (non-priority)	B4.3.2 % of institutional funding provided to the library
I16.	Staffing expenditure / Number of students (non-priority)	-
I17.	Material expenditure / Number of students and teacher-researchers	-
I18.	Material expenditure / Total library expenditure (including salaries and wages)	-
I25.	Material expenditure / Library staffing expenditure	B3.3.3 Ratio of acquisition expenditure to staffing expenditure
I19.	Electronic material expenditure / Material expenditure	B4.1.1 Percentage of information provision budget devoted to electronic collection acquisition expenditure
I20.	Number of days of staff training / Number of staff (FTE)	B4.2.3 % of time personnel spent in training
I21.	Library budget income not provided by the institution of the supervising ministry (local authority subsidies or the library's own resources) / Total library expenditure (including salaries and wages)	B4.3.1 Percentage of library resources provided by a special grant or own resources

10.3. Annex 3: Data sources by country

FRANCE	
Sources	DISTRD - ESGBU - MESRI - dataESR
Years obtained / accessible	2013, 2014, 2015, 2016/ temporary
Data at the national level or per institution	Institutions included in the ESGBU and the SISE index (student data) + the BIU: for a total of 110 institutions in 2016
Existence of a French or English glossary	Yes, at the initiative of the MESR
Web site access to data	No - Data will be freely available once the overhaul of the ASIBU data access system is complete
Deliverables obtained / accessible	1 XLS file every 3 years + 1 file for 2016
Contacts	François Musitelli, DISTRD
UNITED KINGDOM (AND IRELAND)	
Sources	SCONUL
Years obtained / accessible	2013-2014, 2015-2016, 2015-2016
Data at the national level or per institution	Institutions referenced by SCONUL (168 for the UK and 9 for Ireland in 2016)
Existence of a French or English glossary	Yes, an English glossary is available in the summary reports
Web site access to data	No - Access to data is restricted to members
Deliverables obtained / accessible	1 XLS file and 1 summary report per academic year
Contacts	Ann Rossiter, Executive Director, SCONUL - ann.rossiter@sconul.ac.uk
SWITZERLAND	
Sources	Swiss Federal Statistical Office CH
Years obtained / accessible	2003-2016
Data at the national level or per institution	Institutions (14 in 2016)
Existence d'un glossaire français ou anglais	Yes
Web site access to data	Yes https://www.bfs.admin.ch/bfs/fr/home/statistiques/culture-medias-société-information-sport/culture/bibliotheques.assetdetail.3104685.html
Deliverables obtained / accessible	1 XLS file for all years
Contacts	-
SPAIN	
Sources	REBIUN
Years obtained / accessible	2007-2016
Data at the national level or per institution	Institutions (75 in 2016)
Existence of a French or English glossary	Yes, in Spanish (obtained by the UPC) Translation by H. Coste
Web site access to data	Yes https://rebiun.um.es/rebiun/wicket/bookmarkable/es.cyum.rebiun.web.pub.PublicIndicators
Deliverables obtained / accessible	1 XLS file per calendar year
Contacts	rebiun@crue.org (unanswered emails)
GERMANY (AND AUSTRIA)	
Sources	Deutsche Bibliotheksstatistik (DBS)
Years obtained / accessible	1999-2016
Data at the national level or per institution	Institutions (in 2016, 268: 244 in Germany, 24 in Austria) Wissenschaftliche Universal- und Hochschulbibliotheken NC : 158 Wissenschaftliche Spezialbibliotheken
Existence of a French or English glossary	Yes, but in German. Translation by F. Blin (BNU)
Web site access to data	Yes https://www.bibliotheksstatistik.de
Deliverables obtained / accessible	1 XLS file per calendar year
Contacts	Ira Foltin, DBS - dbs@hbz-nrw.de

FINLAND

Sources	Research Library Statistics Database / National Library of Finland
Years obtained / accessible	2002 to 2016
Data at the national level or per institution	Institutions: 39 Finnish Research Libraries (excluding the National Library)
Existence of a French or English glossary	Explicit data in English included in the data files
Web site access to data	Yes https://yhteistilasto.lib.helsinki.fi/?lang=en
Deliverables obtained / accessible	1 XLS file for all years (institutions listed by column)
Contacts	Jarmo Saarti, Library director, University of Eastern Finland jarmo.saarti@uef.fi

DENMARK

Sources	Statistics Danemark
Years obtained / accessible	2009 to 2015
Data at the national level or per institution	National level consolidation and institutions (40) Research Libraries
Existence of a French or English glossary	Explicit data in English included in the data files
Web site access to data	Yes http://www.statbank.dk/10391
Deliverables obtained / accessible	7 XLS files (groups of data)
Contacts	-

HUNGARY

Sources	Hungarian Library Institute
Years obtained / accessible	1998 to 2016
Data at the national level or per institution	Institutions: 1. szak: MTA - / library of the Hungarian Academy of Sciences' system 2. egészségügyi, orvosi könyvtár / health-service or medical library 3. szak: országos szakkönyvtár / national special library 4. felsőoktatási könyvtár / tertiary library
Existence of a French or English glossary	Data is presented in Hungarian
Web site access to data	Yes http://ki.oszk.hu/content/statisztika
Deliverables obtained / accessible	1 XLS file per calendar year
Contacts	Adrienn Horváth, horvath.adrienn@oszk.hu

THE NETHERLANDS

Sources	FOBID, Netherlands Library Forum
Years obtained / accessible	2012, 2013, 2014, 2015
Data at the national level or per institution	National consolidation (13 Dutch University Libraries) excluding 21 Libraries of Dutch Universities of Applied Sciences
Existence of a French or English glossary	Explicit data in English included in the summary reports
Web site access to data	Yes - http://www.fobid.nl/publicaties
Deliverables obtained / accessible	No XLS files available: 1 summary report per year (public libraries and university libraries) => data entries
Contacts	Ms. Yvonne C. May, Dutch library consortium UKB, y.may@uu.nl

NORWAY

Sources	Statistics Norway
Years obtained / accessible	2013 to 2016
Data at the national level or per institution	National consoldiation (All Academic and special libraries) including the National library
Existence of a French or English glossary	Explicit data in English included in the data files
Web site access to data	Yes https://www.ssb.no/en/kultur-og-fritid/statistikker/ffbibl
Deliverables obtained / accessible	6 XLS files of grouped data
Contacts	-

ESTONIA

Sources	Estonian Statistics
Years obtained / accessible	2000 to 2016
Data at the national level or per institution	National consolidation (special and scientific libraries total): 43 libraries in 2016 (including the National library)
Existence of a French or English glossary	Explicit data in English included in the summary reports
Web site access to data	Yes http://pub.stat.ee/px-web.2001/I_Databas/Social_life/01Culture/10Libraries/10Libraries.asp
Deliverables obtained / accessible	4 XLS files of grouped data
Contacts	-

SWEDEN

Sources	National Coordination of Libraries at the National Library
Years obtained / accessible	2016
Data at the national level or per institution	Institutions
Existence of a French or English glossary	Data are presented in Swedish
Web site access to data	Yes http://biblioteksstatistik.blogg.kb.se/allt-om-biblioteksstatistiken/
Deliverables obtained / accessible	1 XLS file per calendar year
Contacts	Cecilia Ranemo, Cecilia.Ranemo@kb.se