MEASURING OUR VALUE

Results of an independent economic impact study commissioned by the British Library to measure the Library’s direct and indirect value to the UK economy.
The British Library has undertaken a transformational modernisation programme
In 2000 we appointed a new CEO and have subsequently reorganised the entire
management structure, set a rigorous strategic agenda, completely reengineered
the largest information supply service in the world, radically transformed HR and
secured electronic legal deposit legislation.

The British Library is making existing resources go further
Since 2000 we have achieved efficiency savings of £17m which we have reinvested
in our services. These savings have been achieved as part of an overall programme
of reform and service improvement which will realise £65m cumulatively in operating
savings by 07/08.

The British Library is committed to delivering government’s strategic aims
Our investment in new technology, customer focused public service delivery and
greater access to services underpin key government priorities.

The British Library is an outstanding investment for public funds
Ground-breaking research has shown that we conservatively generate £363m
value for the UK economy each year, equivalent to £4.40 for every £1 of public
money invested.

The British Library is at the forefront of managing the UK’s digital future
As more and more material is published digitally we are the only organisation
that can manage the collection of non-print items published in the UK.

The British Library must maintain its position as one of the greatest
research libraries in the world
We need to ensure that our collection and services continue to keep pace
with other world libraries, enabling our users to develop, deliver and advance
world class research, scholarship and business innovation for the benefit of
the UK economy.
Assessing the British Library’s contribution to the national economy is a complex matter, requiring consideration of a number of different dimensions. First, the value added by the Library takes many forms – economic, cultural, social and intellectual. Second, the British Library adds value both to those who use our products and services directly, and to the wider UK population who benefit indirectly from the Library’s existence and the services it provides.

Traditionally, attempts to assess these benefits have taken the form of qualitative case studies – telling good stories perhaps, but failing to provide a comprehensive evaluation. But now a technique supported by the Nobel Prize winning economists Kenneth Arrow and Robert Solow, permits a coherent quantitative evaluation of the total benefit to the nation of publicly funded institutions and programmes. Building on this analytical achievement, the UK Government and international organisations such as the World Bank and the OECD have used the technique, known as Contingent Valuation, to inform and guide policy. Recognising the value of this technique, the British Library commissioned a ground-breaking research study to estimate the economic impact of the Library on the UK economy. The study has been conducted jointly by two independent research organisations, Spectrum Strategy Consultants and Indepen. The results and the methodology are summarised in this document. I am delighted to share this with you.

Lord Eatwell
Chairman, The British Library
Professor of Financial Policy, University of Cambridge


BRITISH LIBRARY FACT FILE

Helping people advance knowledge to enrich lives

- One of the world’s great libraries
- 250 years of collecting - new acquisitions grow at 12km of shelving per year
- Contains in excess of 150 million items
- Serves many different user groups including researchers, the business community, libraries, schools and the general public
- Provides wide range of services, including accommodation for 1200 Readers at St Pancras and the largest document supply service in the world
- Employs 2300 people at three main sites in London and Yorkshire
### HOW WE ADD VALUE

<table>
<thead>
<tr>
<th>CLIENT</th>
<th>VALUE</th>
<th>ENDORSEMENT</th>
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<tr>
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<td>■ Profile: AstraZeneca spends an R&amp;D budget of £3 billion a year to produce some of the most effective medicines in the world.&lt;br&gt;■ Direct: The British Library’s innovative technology delivers its collections of research material directly to the desktop of scientists at AstraZeneca and many other major blue chip organisations.&lt;br&gt;■ Indirect: The benefits which millions receive from AstraZeneca products and those of other major UK pharmaceutical companies are both economic and social.</td>
<td>&quot;The British Library delivers material straight to the scientists, so they have the information quickly and efficiently. We’ve built our system to interface with the Library’s, to make the relationship as effective as possible.&quot;</td>
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<td>&quot;We have been frequent users of the British Library as our key information provider – the Urgent Action service has proven to be a lifesaver … the variety of methods with which a company, institution or individual can order items is an illustration of how the Library is dedicated to serving its customers in the best way that it can and they appear to be constantly trying to improve this service.&quot;</td>
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<td>&quot;The world class research carried out in UK HE is dependent on resources provided by the British Library. We have built a strategic alliance between our two organisations to cement the relationship between the Library and HE. It prepares the ground for further joint activity to ensure that UK researchers have the resources they need, and to hold our lead in exploiting the full potential of new digital information sources.&quot;</td>
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<td><strong>CompGen Ltd</strong>&lt;br&gt;Mark Sheahan&lt;br&gt;Innovator of the Year 2003</td>
<td>■ Profile: CompGen Ltd is a successful startup whose founder and MD has just won the prestigious Innovator of the Year Award.&lt;br&gt;■ Direct: The British Library holds the most comprehensive range of patents in the world and the best collection of business information in the UK and is a vital resource for inventors and companies researching ideas for new products.&lt;br&gt;■ Indirect: Mark Sheahan’s Squeezeopen® containers will help prevent the 60,000 packaging related accidents which require hospital treatment every year, thus saving the health service money as well as driving the economy through sales and employment.</td>
<td>&quot;The British Library’s expert staff are a great help for the new inventor. They run patent clinics to help people get started. I keep an eye on the trade press to make sure that mine are not pirated, and I know that other inventors have used the collections when taking action to protect their intellectual property. The Library’s resources empower the lone inventor.&quot;</td>
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<td><strong>Faber &amp; Faber</strong>&lt;br&gt;Lord Evans&lt;br&gt;Chairman</td>
<td>■ Profile: Faber &amp; Faber, market leader in film and drama, and one of the last great independent publishing houses in London, relies on the British Library to support its authors in their work.&lt;br&gt;■ Direct: The Library is used by thousands of authors for study and inspiration every year.&lt;br&gt;■ Indirect: Faber &amp; Faber’s publications inspire millions of readers and provide raw material for theatre, TV, radio and film, thus yielding economic, cultural, social and intellectual benefits.</td>
<td>&quot;Contemporary publishing depends upon the research and scholarship of the past. Both publishers and authors rely on the British Library’s unrivalled collections to provide the raw materials that help inspire and inform them in their work. At Faber &amp; Faber, we and our authors remain heavily dependent on the British Library’s resources to provide well researched, authoritative new writing.&quot;</td>
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METHODOLOGY

The technique that has been used to assess the value of the British Library is known as Contingent Valuation. The idea is that by means of carefully designed surveys it is possible to elicit, in quantitative terms, how much people value a particular organisation or service.

In commissioning this study, the British Library set out to discover both the value enjoyed directly by users of the Library, and the value enjoyed indirectly by UK citizens. In each case, the economic welfare that the British Library generates has been measured by the size of the consumer surplus, i.e. by the value gained by beneficiaries over and above any cost to them of the Library's services - users of the Reading Rooms pay nothing, while users of the Document Supply Service pay fees for receiving documents.

The consumer surplus has been measured through surveys in which beneficiaries have been asked, amongst other things:

- How much they would be willing to pay for the Library's continued existence
- What is the minimum payment they would be willing to accept to forgo the Library's existence
- How much they invest in terms of time and money to make use of the Library
- How much they would have to pay to use alternatives to the Library, if such alternatives could be found.

Careful questionnaire design including rigorous testing and analysis (as proposed by Arrow and Solow and refined in subsequent practical studies) permits the estimation of the value that respondents place on the Library.

The work to assess the value of the British Library has required a substantial amount of primary research - over 2,000 people have been interviewed. Given the nature of the Library's role, individuals were selected at random from different groups including members of the wider public as well as direct users of the Library's products and services.

While the methodology used is the most appropriate available, this work is still not an exact science. The results reported are likely to be conservative given that, for practical reasons, the study did not capture the complete range of products and services which the Library offers (e.g. website usage was not valued). In addition, the results exclude any value generated for non-UK British Library users. This is likely to be substantial and to generate reciprocal value for the UK economy. Finally, it is important to keep in mind that this methodology only provides a snapshot of the British Library based on today's picture and does not capture emerging products and services such as digitisation and other web-based services.

The British Library intends to commission further studies to build on this valuable first step. These will measure changes in value over time, and increase understanding of the value of emerging products and services.

SUPPORT FOR THE CONTINGENT VALUATION METHODOLOGY

Arrow, Solow, et al. set out to measure the value to the United States of legislation limiting discharge of oil. Evaluating the consequence to those who benefited directly was relatively straightforward. “But for at least the last twenty-five years, economists have recognised the possibility that individuals who make no active use of a particular beach, river, bay, or other such natural resource might, nevertheless, derive satisfaction from its mere existence, even if they never intend to make active use of it.” In any correct assessment of the value of a given programme, these indirect benefits must be included. Arrow, Solow, et al concluded that Contingent Valuation was the best approach for measuring both the direct and indirect benefits in such a case.
Each year the British Library generates value around 4.4 times the level of its public funding

- The total value each year of the British Library is £363m of which £304m is indirect value and £59m direct value.

- For every £1 of public funding the British Library receives annually, £4.40 is generated for the UK economy.

- If the British Library did not exist, the UK would lose £280m of economic value per annum.

- The study shows that investment in the British Library pays huge dividends to UK plc, and that the Library represents value for money for the British taxpayer. It illustrates the tangible benefits to the economy that flow from the strategy of investment in the knowledge economy, information technology, and research and development.

- The study clarifies the Library’s value, not only to those users who access the Library’s collections and services directly, but to members of the public throughout all regions of the UK who reap the indirect benefits of the world class scientific research, creativity and innovation that is underpinned by the British Library.

**Note**
(3) Excludes the considerable value generated for non-UK British Library users.
(4) Net of British Library revenues from priced services.
(5) Baseline Grant-in-Aid for 2003/04.
The fundamental challenge is to create a knowledge-driven economy that serves our long-term goals of first-class public services and economic prosperity for all. To do so we need to innovate. We need to use ideas and intelligence in new ways that create higher value added products and better quality services ... and we must extend the opportunities of the information age to all.

Rt Hon Tony Blair MP
Prime Minister
Keynote Speech to e-Summit, 19 November 2002

The public have a right to know that they are getting value for money and therefore there are tough choices and hard decisions that have to be made ... the something-for-nothing days are over in our public services and there can be no blank cheques.

Rt Hon Gordon Brown MP
Chancellor of the Exchequer
Pre-budget Briefing for Cabinet, 20 March 2002

The British Library is pleased to acknowledge the work of Spectrum Strategy Consultants and Indepen in completing this Study
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www.spectrumstrategy.com

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T +44 (0)20 7412 7112
val.mcburney@bl.uk
www.bl.uk

Front Cover
ripple effect n. the continuous and spreading results of an event or action
Oxford English Dictionary ... whose researchers use the British Library's Reading Rooms to verify new words.
serving our users...

<table>
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<tr>
<th>USERS</th>
<th>EXAMPLES</th>
<th>BL SUPPORT &amp; SERVICES</th>
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<tr>
<td>RESEARCHERS</td>
<td>University and research staff</td>
<td>Unrivalled collections</td>
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<td></td>
<td>Scholars and students</td>
<td>Online catalogues</td>
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<td></td>
<td>Independent authors and journalists</td>
<td>State of the art reading rooms</td>
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<td>Largest remote information supply service in the world</td>
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<td>Tailored research services</td>
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<td></td>
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<td>Imaging services</td>
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<td>BUSINESSES</td>
<td>FTSE 250</td>
<td>Largest patent collection in the world</td>
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<td>Small and medium enterprises (SMEs)</td>
<td>Most comprehensive business information collection in the UK</td>
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<td></td>
<td>Entrepreneurs</td>
<td>Tailored research service</td>
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<tr>
<td>LIBRARIES</td>
<td>Academic libraries</td>
<td>National bibliographic catalogues</td>
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<td></td>
<td>Regional public libraries</td>
<td>Remote information supply service</td>
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<td>Digitisation services</td>
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<td>Collect Britain</td>
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<td>Regional exhibitions</td>
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<td>EDUCATION</td>
<td>School teachers</td>
<td>Dedicated education resources</td>
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<td></td>
<td>School children</td>
<td>Workshops</td>
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<td>Website</td>
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<tr>
<td></td>
<td></td>
<td>Artists in residence</td>
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<tr>
<td>PUBLIC</td>
<td>Visitors to the Library’s building at St Pancras</td>
<td>Free exhibitions</td>
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<td></td>
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<td>Website</td>
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<td>Conferences</td>
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<td>Tours</td>
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<td>Visitors to <a href="http://www.bl.uk">www.bl.uk</a></td>
<td>Literary events</td>
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<td>Bookshop</td>
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<td>Publishing</td>
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THE BRITISH LIBRARY GENERATES VALUE...

- For every £1 of public funding the British Library receives each year, £4.40 is generated for the economy per annum.
- If public funding of the Library were to end, the UK would lose £280m of economic value per annum.
- Excludes value generated for non-UK registered users which is considerable and also results in reciprocal benefits for UK nationals visiting institutions overseas.

NOTE
(1) Net of BL revenues. (2) In 02/03 the Library received £7m

managing storage capacity...

<table>
<thead>
<tr>
<th>OUR STORAGE STRATEGY FOR THE LONG TERM MUST BE RESOLVED</th>
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<tbody>
<tr>
<td>Shelving requirements continue to grow at 12.5km each year. Current storage capacity will be operationally full in 06/07. The national newspaper collection is housed in a building which is not fit for purpose.</td>
</tr>
<tr>
<td>By planning ahead we invest to save</td>
</tr>
<tr>
<td>The Library’s collections and operations will be consolidated within two freehold sites</td>
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<tr>
<td>Physical storage requirements will be in place up to 2020</td>
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<tr>
<td>Investment in high-bay high-density shelving is universally recognised as modern, efficient and cost effective</td>
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<tr>
<td>Newspaper surrogation programme will be accelerated to protect vulnerable material which will be better accommodated at Boston Spa</td>
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<tr>
<td>The national newspaper service will be integrated into St Pancras.</td>
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<tr>
<th>GOALS</th>
<th>SR2002 Phase I</th>
<th>SR2004 Phase II</th>
</tr>
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<tbody>
<tr>
<td>300km high-bay high-density storage</td>
<td>50% Partially Funded</td>
<td>50% Unfunded</td>
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<tr>
<td>Vacate Woolwich</td>
<td></td>
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<td>Vacate Colindale Leasehold</td>
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<td>Vacate Micawber Street</td>
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<td>Vacate Colindale Freehold</td>
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<tr>
<td>Accelerate newspaper microfilm surrogate production programme</td>
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<td>Remove original newsprint materials to Boston Spa</td>
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<td>Provide integrated Newspaper Service at St Pancras</td>
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NOTE
(1) Net of BL revenues. (2) In 02/03 the Library received £7m of donations/investments and £27m from its commercial services in addition to GIA.

THE BRITISH LIBRARY GENERATES VALUE AROUND 4.4 TIMES THE LEVEL OF ITS PUBLIC FUNDING

<table>
<thead>
<tr>
<th>Total Value per annum</th>
<th>Benefit cost ratio 4.4:1</th>
<th>Public Funding (2)</th>
</tr>
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<tbody>
<tr>
<td>£363m (1)</td>
<td></td>
<td>£83m</td>
</tr>
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delivering value...
STRATEGIC PRIORITY | SUPPORTING BL ACTIVITY
---|---
Gov't | Ensure policy making is forward looking - Rigorous strategy development
Make public services responsive - Continuous customer research
Provide quality public services - Radical service modernisation programme
Use new technology to improve the delivery of public services - Ambitious digitisation and electronic delivery
Value modernising the Civil Service as an employer - Progressive HR reform programme
DCMS | Enhance access to a fuller cultural life for children and young people - Workshop programme, exhibitions, website
Open up our institutions to the wider community, to promote lifelong learning and social cohesion - Public exhibitions, website
Maximise the contribution which the leisure and creative industries can make to the economy - Access to unrivalled collections and expertise
Modemise delivery - Remote information supply
DfES | Give children an excellent start in education so that they have better foundations for future learning - Access to unrivalled collections and expertise
Enable all young people to develop and equip themselves with the skills, knowledge and personal qualities needed for life and work - ‘Learning’ website
Encourage and enable adults to learn, improve their skills and enrich their lives - Access to unrivalled collections and expertise
DTI | Promote enterprise, innovation and increased productivity - Tailored research services
Make the most of UK's science, engineering and technology - Online searchable databases
Develop strong competitive markets within a regulatory framework which promotes fairness and sustainability - Largest information supply service in the world
Enhance competitiveness of UK companies through overseas sales and investments - Groundbreaking research measures our value at £4.40 for every £1 invested

MAINTAINING THE BASELINE IS CRITICAL
The nation must avoid serious gaps and irredeemable loss to the Library’s collection and services.
- Except for inflation our application for baseline funding is the same as that secured in 2002
- The Library will continue to achieve and reinvest savings as part of an ongoing efficiency programme which is planned to deliver £65m.

GOALS | 2007 | 2008
---|---|---
Maintain high levels of customer service | | 
Continue to manage savings and efficiencies | | 
Consolidate performance management culture | | 
Complete headcount reduction | | 
Ensure completion of existing capital maintenance projects | |
## HOW WE ADD VALUE

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Lord Evans
Chairman, Faber & Faber

FACT FILE

- The creative industries* in the UK generate annual revenues of approximately £112.5 billion
- Account for over 5% of GDP
- Employ some 1.3 million people
- Generate exports of around £10.3 billion to the balance of trade
- London’s creative industries are hugely important to the future of London’s economy
- Generate annual revenues of £21 billion
- Create one in five jobs
- London Cultural Capital 2003 sets out to
  - Develop London’s cultural and creative industries
  - Reorientate London’s social and economic profile
  - Improve the quality of urban design in the King’s Cross area
  - Build on the existing facilities of the British Library
- The British Library is fast becoming the first choice provider of content, navigation and research services for the creative industries
- Nearly 25% of all readers are from the creative industries
- The creative industries spent £2 million on electronic document supply (02/03)
- The Library has a proven track record in supporting design-led entrepreneurs including Trevor Baylis, James Dyson, Mandy Haberman and Mark Sheahan, as well as major organisations such as the BBC.

* Architecture, art, antiques, crafts, design, designer fashion, film, video, interactive leisure software, music, performing arts, publishing, computer services, television, radio, cultural heritage, tourism, museum industries
INCREASING OUR VALUE TO
CREATIVE INDUSTRIES

SERVICES

- Reading Rooms
  - Staffed by experts to guide users to relevant information and materials
  - Free access to unique collection spanning 3,000 years of world culture and creativity – books, journals, market research, newspapers, images, maps, music manuscripts, voice and sound recordings
  - Customised services to customer deadlines and budgets
  - A recent Reader Survey (Q3/03) showed that over 93% of all users were completely/very satisfied on a wide range of criteria, including comprehensiveness of collection, working environment and staff expertise

- Reproduction and Imaging
  - Largest and one of fastest remote information supply services in the world including 24 hour electronic delivery and 2 hour turnaround
  - Virtually everything in the Library’s collection can be reproduced in a number of formats, including digital, photographic, microform and paper

- www.bl.uk
  - Users are directed to a wide range of services and resources which have been specially developed for the creative industries
  - The recently launched images Online makes available for instant download 10,000 unique digital images

- Patent and Intellectual Property
  - Largest patent collection in the world
  - Regular patent searching workshops including trademarks, registered designs and copyright information.

INITIATIVES

- Innovation Centre (05/06)
  - Being developed to support entrepreneurs and SMEs particularly those in the creative and scientific industries
  - Initial market research from SME focus groups has been very positive
  - British Library perceived as a credible, trustworthy and impartial resource

- SME Web Portal (Q3/04)
  - Being developed to enable easy searching and access to Library materials including electronic delivery, on a pay-per-view basis
  - Phase One will focus on scientific, technical and medical documents
  - Phase Two (05) will focus on additional content for the creative industries, including images and sound

- Supporting London (04)
  - Launched series of Asian business events in conjunction with the Library’s major Silk Road exhibition (Q2/04)
  - Continuing to support London Design Festival and World Creative Forum
  - Developed close working relationship with Greater London Authority to support London as a world-class cultural centre

- Resource Sharing and Collaboration
  - In discussion with regional cultural and library networks to incorporate the SME Web Portal into the People's Network
  - Initiated highly constructive discussions with the LDA, DTI, HEIs, business advisors (eg. Business Links), business and trade associations to refine and promote the Library’s Innovation Centre proposition.
“The British Library’s expert staff are a great help for the new inventor. They run patent clinics to help people get started. I keep an eye on the trade press to make sure that mine are not pirated, and I know that other inventors have used the collections when taking action to protect their intellectual property. The Library’s resources empower the lone inventor.”

Mark Sheahan
CompGen Ltd
Innovator of the Year 2003

FACT FILE

- SMEs account for over 99% of the UK’s 3.7 million businesses
- Some 12% of people have considered starting a business in the last two years
- Some 33% of small firms engage in research and development activity
- Some 37% of SMEs reported some form of innovation over the previous two years
- Government is committed to capitalise on UK’s inventiveness
- DTI Innovation Report 2004 set out direct measures to raise rate of innovation across UK
- Greater cooperation is required between business, government and HE
- The nation needs to increase record of knowledge transfer and exploitation by business

- The British Library fully embraces the critical role it plays in making available unrivalled resources and expertise to SMEs and individual entrepreneurs
- Over 10,000 SMEs are registered customers of the Library’s priced information services
- Nearly half of all SMEs are within two hours’ travel from the British Library Reading Rooms at St Pancras
- The Library has a proven track record supporting design-led entrepreneurs, including Trevor Baylis, James Dyson, Mandy Haberman and Mark Sheahan.
## SERVICES

- **Reading Rooms**
  - Staffed by information experts to guide users to relevant information and materials
  - Free access to unique collection – books, newspapers, journals, images, maps, music manuscripts, market research, voice and sound recordings
  - Largest patent collection in the world
  - Most comprehensive collection of business information in UK
  - A recent Reader Survey (Q3/03) showed that over 60% of business users are entrepreneurs and SMEs, and over 40% are self-employed or in start-up companies
  - Over 93% of all users completely/very satisfied on a wide range of criteria, including comprehensiveness of collection, working environment and staff expertise

- **Research Support**
  - Customised research service covering intellectual property, biology, chemistry, medicine, technology, legislation and market information

- **Information Supply**
  - Largest and one of fastest remote information supply services in the world including 24 hour electronic delivery and 2 hour turnaround
  - Systematic access to materials to which SMEs cannot afford to subscribe

- **www.bl.uk**
  - Directs business users to a wide range of services and resources

- **Patent and Intellectual Property**
  - Regular patent searching workshops including trademarks, registered designs and copyright information
  - Currently, 50% of participants are inventors/entrepreneurs and 30% are from SMEs.

## INITIATIVES

- **Innovation Centre (05/06)**
  - Being developed to support entrepreneurs and SMEs particularly those in the creative and scientific industries
  - Initial market research from SME focus groups has been very positive
  - British Library perceived as a credible, trustworthy and impartial resource

- **SME Web Portal (Q3/04)**
  - Being developed to enable easy searching and access to Library materials including electronic delivery, on a pay-per-view basis
  - Phase One will focus on scientific, technical and medical documents
  - Phase Two (05) will focus on additional content for the creative industries, including images and sound

- **Supporting London (04)**
  - Launched series of Asian business events in conjunction with the Library’s major Silk Road exhibition (Q2/04)
  - Continuing to support London Design Festival and World Creative Forum
  - Developed close working relationship with Greater London Authority to support London as a world-class cultural centre

- **Resource Sharing and Collaboration**
  - In discussion with regional cultural and library networks to incorporate the SME Web Portal into the People’s Network
  - Initiated highly constructive discussions with the LDA, DTI, HEIs, business advisors (eg. Business Links), business and trade associations to refine and promote the Library’s Innovation Centre proposition.
INCREASING OUR VALUE TO RESEARCH IN SCIENCE, TECHNOLOGY AND MEDICINE (STM)

“The British Library delivers material straight to the scientists ... we’ve built our system to interface with the Library’s, to make the relationship as effective as possible.”

Susan Cooper
AstraZeneca, Information Expert

FACT FILE

- STM research dominates UK innovation
  - 80% of UK research expenditure is used by STM

- STM research is one of government’s highest priorities
  - Government is committed to capitalise on UK inventiveness
  - DTI Innovation Report 2004 set out direct measures to raise the rate of innovation across UK
  - Greater cooperation is required between business, government and HE
  - The nation needs to increase record of knowledge transfer and exploitation by business

- The British Library is recognised by government for the important role it plays in supporting scientific research in the UK*
  - The British Library is the only organisation with a statutory public good remit to collect, preserve and provide long-term access to research information for the whole of the UK
  - Over 80% of UK’s top R&D scoreboard companies use British Library services
  - 75% of all new registrations for the Library’s commercial services are from SMEs, 33% of which are engaged in R&D activity
  - Over 50% of researchers who use British Library services are STM graduates
  - Over 3 million scientific, business and patent items are consulted every year by STM researchers using British Library Reading Rooms at St Pancras
  - 33% of all reading room visits are STM related
  - 70% of all remote documents are requested by STM researchers.

### SERVICES

- **Collection**
  - STM materials represent over 40% of the Library's total holdings
  - Approximately 50% of the Library's acquisition budget is dedicated to STM
  - Largest collection of patents and grey literature* in the world

- **Information Supply**
  - Largest and one of fastest remote information supply services in the world including 24 hour electronic delivery and 2 hour turnaround

- **Research Support**
  - Customised services to customers' deadlines and budgets
  - In-house expertise in intellectual property, biology, chemistry, medicine, technology, legislation and market information
  - Patent searching workshops including trademarks, registered designs and copyright information

- **Customer Alerting Service – Inside/ETOC**
  - Integrated searching and ordering service available via www.bl.uk
  - Alerts researchers of new articles in their specific field
  - Monitors top 20,000 journals
  - Features database of over 20 million articles from 13,000 science serials, 7,000 social science serials and 120,000 conferences
  - Adds 8,000 new articles to database every day.

*unpublished materials eg. theses, conference proceedings, government reports

### INITIATIVES

- **Innovation Centre (05/06)**
  - Being developed to support entrepreneurs and SMEs particularly those in the scientific and creative industries
  - British Library perceived as a credible, trustworthy and impartial resource

- **SME Web Portal (Q3/04)**
  - Being developed to enable easy searching and access to Library materials including electronic delivery, on a pay-per-view basis
  - Phase One will focus on scientific, technical and medical documents

- **Resource Sharing and Collaboration**
  - In discussion with regional cultural and library networks to incorporate the SME Web Portal into the People’s Network
  - Initiated highly constructive discussions with the LDA, DTI, HEIs, business advisors (eg. Business Links), business and trade associations to refine and promote the Library’s proposed Innovation Centre
  - Increasing collaboration with leading STM publishers to provide fast electronic access to a large aggregated source of content via secure electronic delivery

- **Digital Preservation**
  - The **Legal Deposit Libraries Act 2003** extends the British Library’s statutory requirements to e-materials
  - Joint founders of Digital Preservation Coalition with JISC
  - Joint participants in UK Web Archiving Consortium
  - Creating digital infrastructure to ensure preservation of scholarly materials generated in digital form
  - The British Library is leading a major initiative to develop an in-depth 10 year plan for STM.
“The world class research carried out in UK HE is dependent on resources provided by the British Library. We have built a strategic alliance between our two organisations to cement the relationship between the Library and HE. It prepares the ground for further joint activity to ensure that UK researchers have the resources they need, and to hold our lead in exploiting the full potential of new digital information sources.”

Sir Howard Newby
CEO, HEFCE
Higher Education Funding Council for England

FACT FILE

- The British Library plays a pivotal role in underpinning the nation’s Higher Education
  - Over 50% of the Library’s activities support HE
  - 63% of all registered readers are academics
  - 10,000 items are accessed in the British Library Reading Rooms by HE readers every day
  - The Library’s services are available on the basis of ‘need to use’ to all two million students and 120,000 university teachers across the UK
  - All 169 HE institutions in the UK use the British Library’s Document Supply Service

- The British Library is well placed to foster relationships between business and universities to the benefit of the UK economy
  - The British Library is the only organisation with a statutory public good remit to collect, preserve and provide long-term access to research information for the whole of the UK
  - Investing in Innovation 2002 underlined the value the Library adds to the nation’s scientific and technical R&D
  - £30-40 million cost savings are achieved each year by the HE sector through use of surrogate document supply services
  - Extension of legal deposit and progress with e-licensing agreements provide HE and business with unparalleled access to e-resources
  - The British Library is aiming to become recognised as a trusted, first choice global provider of content, through navigation and research services accessible through its planned Innovation Centre (05/06).
## INCREASING OUR VALUE TO HIGHER EDUCATION

### SERVICES

- **Reading Rooms**
  - Staffed by experts to guide users to relevant information and materials
  - Free access to unique collection spanning 3,000 years of world culture and creativity – books, journals, market research, newspapers, images, maps, music manuscripts, voice and sound recordings
  - A recent Reader Survey (Q3/03) showed that over 93% of all users were completely/very satisfied on a wide range of criteria, including comprehensiveness of collection, working environment and staff expertise

- **Information Supply**
  - Largest and one of fastest document supply services in the world including 24 hour electronic delivery and 2 hour turnaround
  - Provides systematic access to materials to which HE does not subscribe
  - Creates opportunity cost savings for HE sector not having to duplicate non-core materials

- **Catalogues and Bibliographic Services**
  - British Library catalogues disclose contents of the Library’s collections, allow them to be discovered and used by HE researchers, and are re-used by HE libraries to avoid duplication of effort and reduce costs
  - Searches of the British Library Catalogue rose from 6.9 million (01/02) to 8.2 million (02/03)
  - ZETOC provides an alerting service to HE. An independent evaluation of the project conducted by Loughborough University reported outstanding results and statistics show that demand for the service continues to grow.

### INITIATIVES

- **BL/HEFCE Strategic Alliance**
  - Promotes information exchange and expertise sharing

- **BL/AHRB Concordat**
  - Identifies shared strategic priorities
  - Promotes framework for development of intellectual infrastructure and training of postgraduate researchers

- **RSLG/RLN**
  - With HEFCE, co-sponsors the Research Support Libraries Group
  - New RLN Office to be based at the Library

- **Monograph Interlending**
  - Collaborative development with CURL of DSC Plus

- **Digital Preservation**
  - Joint founders of Digital Preservation Coalition with JISC
  - Joint participants in UK Web Archiving Consortium
  - Creating digital infrastructure to ensure preservation of scholarly materials generated in digital form

- **Collaboration on Technical Infrastructure/Resource Discovery**
  - COPAC (union catalogue of CURL libraries)
  - SUNCAT (national union catalogue of serials)
  - ZETOC (electronic tables of contents/alerting service)

- **Access to Digital Content of benefit to HE**
  - Digitisation of key scholarly treasures - *Beowulf, The Gutenberg Bible, Caxton’s Chaucer, Shakespeare in Quarto*
  - Digitisation of scholarly materials – *Early English Books Online* etc
  - Incorporation of lifelong learning content – *Collect Britain* – £3.5 million New Opportunities Fund project
  - JISC digitisation programme – agreement of £3 million funding for Library’s digitisation of newspaper and sound materials.
“Your vision fits so well with our vision of how the curriculum should be delivered. Your principles match how we want to encourage more active teaching and learning ... Schools grappling to raise achievement, especially in the inner cities, are recognising that students need a different curriculum diet.”

Michele Innis
Deputy Headteacher
Charles Edward Brooke School, Lambeth
SERVICES

- The British Library's workshop programme has expanded to include The World's Knowledge, Reading Images, Meet a Writer/Artist.
- The Library provides generous advice and training services for teachers eg. INSETS delivered in schools.
- The Library produces high quality innovative learning content for exhibitions and displays eg. creative guides and teachers' notes.
- Online Teachers' Area makes curriculum links to the Library's collections and provides 2,000 pages of resources eg. 21st Century Citizen funded by ISB – a major content-managed web resource designed to help teachers deliver Citizenship.
- Websites for young people will be added (04/05) eg. Sound Thinking, Talking Pictures and Texts in Context.
- Discover, Question, Debate (DQD) introduces a new interface to young people encouraging them to share their research projects and ask questions.
- Learners also have access to the content of the Library's outstanding virtual exhibitions eg. Turning the Pages and Collect Britain.

INITIATIVES

- Funded by DCMS/DfES, Texts in Context provides innovative resources for learning English and studying the humanities. Eight schools are currently using historic British Library texts in workshops, museum visits and creative projects to create resources for other schools to share.
- Journeys of Discovery is an annual two week summer school developed for Camden primary schools.
- Black Dance History provides support for young people to research and recreate dance history and share their research on www.bl.uk.
- British Library Young Explorers enables young people to research heritage projects and share creative outcomes through geocaching – treasure hunts using global positioning devices.
- Critical Friends comprises a group of Camden teachers who apply accelerated learning methods to test and develop Library workshops.
- Annual advanced Masterclasses in Literature are rolled out for 80 gifted and talented students as part of the London Challenge GATE A programme.
- Pearson Creative Research Fellowships enable two artists/writers to research British Library collections, deliver workshops, produce creative outcomes and maintain their own webpages to interact with learners.
- The British Library is constantly involved in research into innovative e-learning, focusing on dialogue and individualised learning.
“NEMLAC’s partnership with the British Library reduces the distance between the Library in London and the 2.5 million people in the North East. We are delighted to be working with the British Library on Reaching the Regions, a major partnership which aims to provide access to the Library’s world-class collections through a range of innovative and collaborative projects and initiatives throughout the region.”

Sue Underwood
Chief Executive, NEMLAC
NE Museums Libraries and Archives Council

FACT FILE

- Government has set out its long-term strategic vision for the public library service encouraging “imaginative innovation and greater operational effectiveness and efficiency, adapted to local need and circumstance”*

- The British Library is proactive in reaching out to the regions and has developed strong collaborative relationships with public library networks
  - British Library interlending is available to all 3,947 libraries and 656 mobile libraries across the UK
  - 2.7 million items supplied remotely by the British Library (02/03)
  - Remote users make around 9,600 searches of the British Library’s online catalogue every day

- The British Library is active in the regions promoting exhibitions, lending materials and engaging in partnership projects.

* Framework for the Future 2003
## SERVICES

- **Information Supply and Inter-library Lending**
  - Over 50% of UK inter-library loans are supplied by the British Library (see chart)
  - 160,000 British Library items requested through UK public libraries (02/03)

- **Catalogue and Bibliographic Services**
  - British Library catalogues can be accessed by all regional libraries
  - Remote searches of the online British Library Catalogue rose from 6.9 million (01/02) to 8.2 million (02/03)

- **www.bl.uk**
  - Provides online sources of information and enables online delivery of discovery tools and content
  - Gives access to virtual exhibitions and Turning the Pages.

## INITIATIVES

- Working with the People’s Network to deliver nationally relevant content eg. Collect Britain NOF-funded (£3.2 million) digitisation project.
- Partnering the National Archives-led NOF project Moving Here
- Cooperating with Newsplan to preserve and improve access to local/regional newspapers throughout the UK. The programme makes newspapers available in microform to local historians and lifelong learners
- Contributing to regional and touring exhibitions eg. Lindisfarne Gospels Facsimile Tour
- Developing a football exhibition with city library partners in Newcastle, Birmingham and Liverpool
- Collaborating with Leeds Central Library to become the public face of the British Library in the North
- Partnering SEMLAC and NEMLAC on Reaching the Regions – a programme developed to promote resources such as Our Saturdays, Thames Pubs and Journeys through Wonderland
- Supporting and hosting the Full Disclosure initiative – developing and implementing the national strategy for retrospective cataloguing and catalogue conversion
- Working with the Library’s Co-operation and Partnership Programme which funds regional projects such as Widening Access to Resources in Merseyside (WARM)
- Increasing links with the Council for Museums, Archives and Libraries and key regional hubs to facilitate improved marketing to regional libraries.

## INTER-LIBRARY LENDING (00/01)

<table>
<thead>
<tr>
<th>INTER-LIBRARY LOANS RECEIVED</th>
<th>from libraries within the region</th>
<th>from the British Library</th>
<th>from other libraries outside the region</th>
<th>Total items received</th>
<th>Total requests satisfied</th>
</tr>
</thead>
<tbody>
<tr>
<td>London &amp; S. East</td>
<td>54,256</td>
<td>26,196</td>
<td>7,192</td>
<td>87,644</td>
<td>92.9</td>
</tr>
<tr>
<td>S. West</td>
<td>29,309</td>
<td>26,569</td>
<td>11,250</td>
<td>67,128</td>
<td>93.0</td>
</tr>
<tr>
<td>W. Midlands</td>
<td>5,988</td>
<td>16,460</td>
<td>10,226</td>
<td>32,674</td>
<td>93.9</td>
</tr>
<tr>
<td>E. Midlands</td>
<td>8,901</td>
<td>17,751</td>
<td>6,101</td>
<td>32,753</td>
<td>88.6</td>
</tr>
<tr>
<td>Yorkshire/Humberside</td>
<td>4,393</td>
<td>24,093</td>
<td>8,110</td>
<td>36,596</td>
<td>90.9</td>
</tr>
<tr>
<td>Northern England</td>
<td>8,969</td>
<td>17,725</td>
<td>6,382</td>
<td>33,076</td>
<td>90.1</td>
</tr>
<tr>
<td>Scotland</td>
<td>8,373</td>
<td>46,643</td>
<td>8,859</td>
<td>63,875</td>
<td>92.8</td>
</tr>
<tr>
<td>Ireland (incl. Eire)</td>
<td>5,571</td>
<td>22,052</td>
<td>3,610</td>
<td>31,233</td>
<td>-</td>
</tr>
<tr>
<td><strong>TOTAL</strong></td>
<td>125,760</td>
<td>197,489</td>
<td>61,730</td>
<td>384,979</td>
<td>92.7</td>
</tr>
</tbody>
</table>

*Source: LISU Annual Library Statistics 2002*
"Having the British Library in Camden offers a wonderful resource. We had a multi-faith tour of the John Ritblat Gallery, which holds great treasures from many world religions. British Library staff were incredibly generous with their time, offering expertise on how these works were produced and discussing them with Camden’s faith leaders."

Nina Rahel
Faith Officer, Camden Council

FACT FILE

- Government is committed to opening public institutions to wider communities to promote lifelong learning and social cohesion
- London’s museums are failing to translate knowledge of diversity issues into good practice and are uncertain about how to develop appropriate services*
- Staffing and governance in the sector does not reflect diverse communities and only 24% of visitors to museums are from ethnic minority backgrounds*
- London’s diverse communities are still getting a raw deal despite some excellent pioneering work*
- Collections, exhibitions and activities often fail to reflect diverse backgrounds and cultures of the communities serviced*
- The British Library recognises the importance of making its resources accessible to a wider public
  - Attracting a more diverse audience
  - Interpreting collections in ways that help people benefit from them, through learning, entertainment and stimulation of ideas
  - Supporting community events
  - Providing creative and professional opportunities for entrepreneurs and artists.

* Holding up the Mirror 2003. Addressing cultural diversity in London’s museums
## Increasing Our Value Through Social Inclusion

### Services

- The British Library consults users and audits all services to ensure that access is improved and barriers to use by people with disabilities are removed
- Key information is available in alternative formats
- Specialist equipment is provided when necessary
- www.bl.uk complies with accessibility standards
- Expert support is available for disabled and disadvantaged users – public and readers
- The Library constantly investigates new technology to improve service delivery to the visually impaired
- The Library collaborates with other libraries and voluntary agencies to share best practice
- The British Library ensures that research services do not exclude minority audiences
- Currently working with Birmingham Library and Information Services to develop a blueprint for providing community library services with access to national library resources
- Widening access to learning resources e.g. INSPIRE - the national scheme which enables other libraries to refer their users to the British Library Reading Rooms
- Increasing links with the Council for Museums, Archives and Libraries and key regional hubs to facilitate improved marketing to regional libraries.

### Initiatives

- The British Library engages with diverse communities to deliver and promote learning opportunities to all, through a variety of educational programmes, exhibitions, events and www.bl.uk
- Themes for public programmes have wide multi-cultural appeal. Exhibitions during the last two years have focused on children's book art – Magic Pencil; faith – Painted Labyrinth; post-Mao China – Chinese Printmaking Today; exchange between the Middle East and Far East – The Silk Road
- Treasures selected for Turning the Pages include Islam – The Sultan Baybars' Qur'an; Christianity – The Lindisfarne Gospels. Plans to add treasures reflecting other world faiths have been developed for this multi-media library
- Literary events are targeted at diverse interest groups both popular and specialist e.g. Asian business events for small businesses and entrepreneurs; Chinese film series; events to support Black History Month
- Community events are regularly incorporated into Library programmes e.g. Camden's Mela - a Taste of Bangladesh
- Working with the Mayor’s Commission on African and Asian Heritage the Library is exploring how to engage with and attract more visitors of African and Asian descent; collaborating with Tamasha Theatre Company to support a professional development initiative for British Asian playwrights, the aims of which are to nurture the artistic individuality of emerging writers and act as a bridge for artists into professional practice.
“The British Library is one of the institutions of which we have every right to be very proud. It contributes to the whole range of British activity.”

Rt Hon Estelle Morris
Minister of State, DCMS
Response to Parliamentary Question, 5 January 2004

FACT FILE

- The British Library has met Government’s strategic priorities to
  - Ensure policy making is forward looking
  - Provide quality public services
  - Make public services responsive
  - Use new technology to improve the delivery of public services
  - Value modernising the Civil Service as an employer
- Since 2000 the British Library has undertaken a transformational modernisation programme
  - Appointed a new CEO
  - Simplified the entire management structure
  - Set a rigorous strategic agenda
  - Driven cultural change by embedding mission statement and core competencies across the Library
  - Completely reengineered the largest information supply service in the world
  - Secured electronic legal deposit legislation
- The British Library is making existing resources go further
  - Since 2000, achieved efficiency savings of £17 million which have been reinvested in our services
  - Overall programme of reform and service improvement estimated to realise £65 million by 07/08
- The British Library is an outstanding investment for public funds
  - Ground-breaking research shows that the Library conservatively generates £363 million value for the UK economy each year
  - Equivalent to £4.40 for every £1 of public money invested.
**INCREASING OUR VALUE THROUGH MODERNISATION**

**INTRODUCED EFFICIENCIES**
- Removed layers of management and streamlined structure
- Introduced competency based performance management system
- Currently developing new pay and grading system
- Introduced leadership development programmes for senior and middle managers
- Introduced British Library induction programme for new staff
- Developed needs-based training programmes for all staff – IT skills, customer service, financial awareness and project management
- Improved internal communications – 70% of staff (03) feel informed vs 56% (99).

**ACHIEVED ADDITIONAL COST SAVINGS**
- Forecast headcount reductions of 370 achieving cumulative cost savings of £20.6 million (07/08)
- Reviewed portfolio of priced services leading to closure of 12 loss-making services
- Replaced multiplicity of IT systems with Integrated Library System (ILS)
- Transferred estates and facilities contracts to single suppliers across all sites
- Outsourced internal print function to deliver faster service and higher quality products
- Excluding cost savings achieved through headcount reduction, forecast cumulative cost savings of £32.1 million (07/08).

**REENGINEERED DOCUMENT SUPPLY**
- Built flexible integrated technical platform to support electronic document delivery, cross database searching and expert information service provision
- Increased 48 hour turnaround for 95% of requests (03/04) vs 65% (01/02)
- Secured permissions from rights owners to launch copyright fee-paid and library privilege electronic delivery on demand directly to users’ desks
- Developed secure electronic delivery technical solution with Elsevier and Adobe
- Established sales and marketing teams and assigned account managers to major accounts
- Forecast cumulative cost savings of £12.7 million (07/08).

**REALIGNED SERVICES TO USERS**
- Developed demand led strategies for five key user groups
- Launched British Library Catalogue Online – generated 8.9 million online searches (02/03) – 65% increase (99/00)
- Introduced secure electronic delivery to users’ desks
- Opened new Readers’ Admissions Office and introduced facilities to complete applications online – over 90% of applications are now processed within 20 minutes
- Digitised over 100,000 unique and rare items as part of Collect Britain
- Launched 21st Century Citizen website to underpin National Curriculum
- Improved Library exhibition programme attracting record visitor numbers of 380,000 (02/03)
- Maintained very high levels of user satisfaction during period of considerable change.