The IFLA Response

by

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Ten years ago, IFLA's Long Term Policy, developed by the Executive Board and adopted by Council in Moscow, included the description of the new and expanded role of libraries in view of the development of new technologies, insisting on the new functions they should assume (access to electronic databases, networking, etc.). IFLA also recognized in this document the importance of elaborating international technical standards and protocols relevant to library practice.

Several years later, the Professional Board, when drafting its Medium-Term-Programme 1998-2001 (1), put a special emphasis on the electronic environment:

> IFLA's strategic direction over the next four years will focus on the electronic environment as it affects IFLA's objective to promote librarianship globally, particularly through the provision of equal access to information literacy programmes, and preservation of the world's documentary heritage.

This emphasis has been reflected in all plans of IFLA professional units with a large range of relevant activities (projects, research papers, seminars and workshops, etc.). They have covered rights managements, use of electronics in various settings and for different media, training, and, of special interest to us here, standards for the organization of electronic resources, including the use of classification as a finding tool.

In December 2000 the Professional Board adopted a list of professional priorities (2), reaffirming the position of IFLA as international advocate "to ensure that the vital role of libraries in the digital age is well understood and acted upon" and "to encourage the development of affordable technologies that will bring information to all the populations of the world". Within IFLA the development of the IFLANET has greatly facilitated the dissemination of information worldwide.

Concerning electronic resources, one of the major works of the ISBD Review Committee and of the Section on Cataloguing is the International Standard Bibliographic Description for Electronic Resources (ISBD(ER)), published in 1997 in the UBCIM Series (3) and translated into several languages including Italian. I shall not dwell on this since it will be presented in detail by Ann Sandberg-Fox. Simultaneously, it was decided that all ISBDs should be reviewed in the light of new technology. For example, it was obvious that the ISBD(S) needed to be revised, because since 1988 (date of the second edition) the concept of so-called "serial publication" had undergone a major change with the appearance of electronic publications and other continuing resources.

In parallel, an important study on the "Functional Requirements for Bibliographic Records" was undertaken in the 1990s by an IFLA Study Group in order "to recommend a basic level of functionality and basic data requirements for records created by national bibliographic agencies". It was also published in the UBCIM Series in 1997 (4). The ISBD Review Group and the Standing Committee of the Section on Cataloguing agreed that the revision of ISBDs should ensure conformity between the provisions of the ISBDs and those of FRBR, especially to achieve consistency with FRBR's data requirements for the "basic level national bibliographic record". At the IFLA Conference in Amsterdam in 1998, Eeva Murtomaa presented a paper on the impact of FRBR on the ISBD(ER), examining the

functionality of the elements included in ISBD(ER) within the FRBR framework and offering proposals for the basic-level national bibliographic record for electronic resources (5).

Meanwhile, the Section on Bibliography conducted in spring 1998 a study to ascertain the extent to which National Bibliographic Agencies (NBA's) were providing coverage of publications in electronic formats, both hand-held and remote access. John Byrum presented the results of this survey at the IFLA Conference in Bangkok in 1999 (6). He noted that national bibliographic agencies throughout the world were responding to the challenges posed by the advent of electronic resources. He recommended a follow-up study within five years, as it was clear that many agencies were preparing new policies and procedures and that changes in legal deposit requirements, for example, would soon alter the findings of the survey.

In November 1998 a conference of historic importance organized by the Division of Bibliographic Control and UBCIM, International Conference on National Bibliographic Services (ICNBS), took place in Copenhagen in order to review and update the recommendations of the 1977 IFLA/UNESCO International Congress on National Bibliographies in the light of new developments (7). In a paper entitled "Standards for International Bibliographic Control: Proposed Data Requirements for the National Bibliographic Record" Olivia Madison (Chair of the FRBR Study Group) listed data requirements for the basic national bibliographic record, giving special attention to descriptive elements for serials and electronic resources (8). She mentioned the then emerging Dublin Core Initiative which she indicated was discussing the critical issues of bibliographic relationships much in the same way as FRBR.

Another project started back in 1996 when Finnish colleagues suggested to the Division of Bibliographic control and UBCIM a project aiming at producing guidelines for good practice for OPAC display and retrieval. It was felt that the development of OPACs had not necessarily been governed by users needs and that significant differences existed in various OPACs features, terminology, and help facilities.

In 1997, at the IFLA conference in Copenhagen, a Task Force on Guidelines for OPAC displays was constituted involving members from the three component sections of the Division, Bibliography, Cataloguing, Classification and Indexing, as well as the Section on Information Technology. A first draft was circulated for worldwide review in 1998 and the results presented at the IFLA Conference in Bangkok in 1999 by Martha Yee, from UCLA Film and Television Archive in Los Angeles, who had been selected as consultant. Based on comments, the draft was substantially revised for further discussion at the IFLA Conference in Jerusalem. A sub-group of the Task-Force then met in Amsterdam in autumn 2000, with work on further revisions continuing at the IFLA 2001 conference in Boston. It is anticipated that a final draft will be sent for worldwide review in March 2002 with the expectation that OPAC Guidelines will be completed prior to IFLA 2002 in Glasgow.

Authority Control has also been influenced by electronic resources and by the development of new communication standards (e.g., Z39.50) which have an obvious impact on the linking of records. While working towards an international system for authority control, IFLA produced guidelines for authority and reference entries and for subject authority and reference entries. The former, Guidelines for Authority and Reference Entries (GARE), published in 1984, had to be revised in view of new developments, since so many advances had occurred in the technological capabilities of libraries. The new edition published last March is entitled Guidelines for Authority and Reference Records (GARR) (9) and covers specifications for authority and reference entries for all types of materials "to be shared in print, microprint and machine-readable form". In the introduction to the new edition, the new developments which have dictated the need for this revision are mentioned and "more than anything else, the introduction of global computer networks" which "has had a tremendous impact on our view of authority control".

A presentation of the "IFLA response" would not be complete without mentioning the work of the Permanent UNIMARC Committee (PUC), which is, as you know, the group of experts in change of the maintenance and promotion of the UNIMARC format under the auspices of UBCIM. In the second update to the UNIMARC Manual/Bibliographic Format published in 1998, the provisional fields for computer files were redefined in order to ensure conformity with the ISBD(ER) and to include description of electronic resources . The PUC is constantly giving attention to these; for example, the 856 field was revised recently in response to users' requests, so that it would be more aligned with MARC21.

In a parallel development, the revision of UNIMARC/Authorities (10), first published in 1991, also took into account the developments in telecommunications and information technology. In the general list of amendments there is mention of the "extension of the format to facilitate links to electronic material and promote international exchange of authority data". I shall not dwell on this since Antonio Scolari is going to present "Electronic Resources in UNIMARC" at another session. I will, however, mention Guideline 6 (for Electronic resources) (11) in the series of guidelines prepared by the PUC to help users deal with various types of materials. Guideline 6 indicates the general model for encoding UNIMARC records for electronic resources. It considers elements which are important when cataloguing these resources as well as the tags requiring special attention. A table shows data elements prescribed by the ISBD(ER) and their corresponding locations in UNIMARC. The last section of this guideline consists of 21 full record examples from various countries.

Among the numerous conferences and workshops which were devoted to electronic resources or included presentations on this topic, it is worth mentioning the Conference on "International and National Cataloguing Rules: Current Situation and Future Trends" held in Moscow in April 1999 (12). This meeting was jointly organized by the IFLA Section on Cataloguing and UBCIM in cooperation with the Russian State Library. Barbara Tillett made a presentation on "Problems and Solutions in Cataloguing Electronic Resources" (13). Recommendations adopted at the conclusion of the conference included some addressed to metadata developers and providers encouraging them, for example, to adhere to standards and to develop permanent identifiers for electronic publications.

The role of IFLA in fostering the establishment of international metadata standards was also discussed, a concern which had already led to the creation of a Working Group within the Section on Cataloguing (the preceding year). This WG, chaired by Lynne Howarth who is one of the speakers at Session III, is not charged with producing a metadata standard per se. Rather, its goals are to review current practices, to determine how to ensure that various standards are interoperable, and to provide guidance to libraries as to when to use metadata and when to provide full bibliographic records. The Chair of the WG has produced a crosswalk including several metadata schemes, and WG members are trying to determine the components of a metadata "core record". The WG will coordinate its work with a Metadata Discussion Group created last year under the Section on Information Technology and is also consulting with the Dublin Core Metadata Initiatives (DCMI) Libraries Working Group on the latter's proposed Library Application Profile.

Among IFLA projects related to electronic resources, there is one of special importance, undertaken in 1998 by the core activities for Preservation and Conservation (PAC) and Universal Availability of Publications (UAP) on behalf of Unesco. It aims to identify digitized collections of national importance worldwide and to produce a directory of them. It was developed within the framework of Unesco's Memory of the World Programme, the goals of which, ensuring the preservation of valuable documents and improving access to them, coincide with the goals of PAC and UAP (14). IFLA has now completed its task and the Directory is accessible on the Unesco's Website (15). It lists major digitized heritage collections but also ongoing digitization projects worldwide. This listing is thus accessible from a single central point and the site acts as the Memory of the World's virtual library. It

offers the possibility of adding records so that Unesco is informed about collections considered for nomination to the Memory of the World's Programme.

Other aspects of the IFLA response includes Copyright in the Digital Environment. The Committee on Copyright and Other Legal Matters (CLM), now one of the seven IFLA core activities, issued a document approved by the Executive Board in August 2000, entitled "The IFLA Position on Copyright in the Digital Environment" (16) stating that "IFLA supports the effective enforcement of copyright and recognizes that libraries have a crucial role to play in controlling, as well as facilitating, access to the increasing number of local and remote electronic information resources".

Lastly, I should like to add that countless workshops on the subject have been organized by various IFLA professional units and that the IFLANET has a very comprehensive listing of IFLA electronic collections. I have no time here to make a review of all IFLA activities and it is not my purpose either. I just wanted to present an overview of significant achievements and projects which have illustrated, I hope, that IFLA has responded and will continue to respond adequately to the "problems, chances, and challenges that bibliographic control of the local and remote access to electronic resource involves".

References

(1) *Medium-Term Programme 1998-2001*, compiled by the Professional Board of IFLA and edited by Sally McCallum. The Hague: IFLA Headquarters, 1998

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 (3) ISBD(ER): *International Standard Bibliographic Description for Electronic Resources*   . Revised from the ISBD (CF). Recommended by the ISBD(CF) Review Group. München: K.G.Saur, 1997 (UBCIM Publications – New Series, vol. 17). http://www.ifla.org/VII/s13/pubs/isbd.htm

 (4) *Functional Requirements for Bibliographic Records. Final report.*   IFLA Study Group on the Functional Requirements for Bibliographic Records. München: K.G.Saur, 1998. (UBCIM Publications – New Series, vol. 19). http://www.ifla.org/VII/s13/frbr/frbr.pdf

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 (7) http://www.ifla.org/VI/3/icnbs/icnbs.htm

 (8) http://www.ifla.org/VI/3/icnbs/mado.htm

 (9) *Guidelines for Authority and Reference Records*   (GARR). 2 [nd] ed., revised by the IFLA Working Group on GARE Revision. München:K.G.Saur, 2001 (UBCIM Publixcations-New Series, vol.23).

 (10) *UNIMARC Manual Authorities Format.*   2nd revised enlarged edition. München: K.G.Saur,2001 (UBCIM Publications-New Series.vol.22).

 (11) *UNIMARC Guideline No. 6. Electronic Resources* . Frankfurt am Main : IFLA UBCIM Programme, 2000. http://www.ifla.org/VI/3/p1996-1/guid6.htm

(12) http://www.ifla.org/VI/3/conf/apr99.htm

 (13) http://www.rsl.ru/e_new1_714.htm

 (14) http://www.ifla.org/VI/2/p1/miscel.htm

 (15) http://www.unesco.org/webworld/mdn/index_2.html

 (16) http://www.ifla.org/III/clm/p1/pos-dig.htm