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EDITORIAL

Success in Seoul!

Stephen Parker

The World Library And Information Congress: 72nd IFLA General Conference and Council, held in Seoul, Korea, from 20–24 August 2006, was another success for IFLA and a triumph for the National Organizing Committee and the library and information profession in Korea, with 2,891 full participants, 447 day visitors and 522 separate exhibition registrations, as well as 522 accompanying persons.

This issue of *IFLA Journal*, the first to be compiled after the Seoul Congress, includes a number of papers presented in Seoul, as well as some which had their origins in previous Congresses held in Berlin and Oslo.

We begin with the inspiring Keynote Address to the Seoul Congress by Dr. Dae-Jung Kim, Former President of the Republic of Korea, who spoke with conviction about the pivotal roles that libraries have to play in determining whether or not the age of knowledge and information will succeed in attaining its aims, and reviewed the place of libraries in the intellectual and cultural traditions of Korea and the efforts which are being made to develop these traditions in the 21st century.

The next paper, by Daniel G. Dorner and Gary E. Gorman of the School of Information Management at Victoria University of Wellington, New Zealand, takes a critical look at prevailing models of information literacy education, which the authors consider to be firmly grounded in Western social and intellectual structures. In their paper, 'Information Literacy Education in Asian Developing Countries: cultural factors affecting curriculum development and programme delivery', the authors assert that, for information literacy education to be meaningfully embedded in the educational fabric of a developing country, it is important to take account of a range of contextual variables that affect how and why individuals learn. Existing models have often been adopted in developing societies without considering the contexts in which they are being applied. The paper addresses three questions

in this regard: How do we define information literacy in a developing country context? How do we best determine the educational objectives of information literacy education in a developing country context? How can cultural awareness improve information literacy education?

The next paper also focuses on information literacy education, though from a different viewpoint. At the World Library and Information Congress in Berlin in 2003, Leslie Murtha, Eileen Stec and Marilyn Wilt from Rutgers University Libraries in the United States collaborated on a half-day workshop which focused on supporting enhanced student learning in information literacy programmes. Their paper, 'Using Assessment as a Tool to Improve Learning: an IFLA Workshop', aims to share the essence of the workshop in the words of the facilitators, each of whom focused on assessment at a different level – teacher/instructor, learner/student, and programmatic/institutional. The workshop was designed to provide participants with an expanded understanding of assessment, and experience with using it effectively as a tool to facilitate improved learning. The participants reflected on the assessment processes which were either contemplated or already in use in their own institutions, and discussed ways to strengthen these processes by grounding them in their institution's mission and goals.

The next contribution to this issue is based on a paper presented at the World Library and Information Congress in Oslo in 2004. In her paper, 'Intellectual Property – benefit or burden for Africa?', Denise Rosemary Nicholson, Copyright Services Librarian at the University of the Witwatersrand, Johannesburg, highlights some of the issues affecting access to knowledge in South Africa and other African countries, as well as the implications of international intellectual property agreements, focusing mainly on copyright. The paper aims to show that most of these countries are struggling to meet the very basic requirements of international intellectual property agreements, yet some of them are being pressured by developed countries to adopt even stricter intellectual property regimes through the Intellectual Property Chapter or 'TRIPS-Plus' in

Free Trade Agreements. The paper highlights the impact of some of the TRIPS-Plus provisions on education, libraries, and people with sensory-disabilities, as well as on public health and development in general, and concludes with an exhortation to readers to “challenge developed countries on this issue and to challenge their own Governments to do the right thing”, encouraging them to support the Development Agenda for the World Intellectual Property Organization (WIPO), the Access to Knowledge Treaty (A2K) and other initiatives designed to help all countries to participate as equal partners on the global stage.

We remain in Africa with the next paper, which is also based on a presentation made in Oslo. In ‘Women and Conflict in the New Information Age’ Bukky O. Omotayo, Reference Librarian in the Hezekiah Oluwasanmi Library, Obafemi Awolowo University, Ile-Ife, Nigeria, comments on the many wars and other violent conflicts which have led to the loss of millions of lives in Africa, and notes that a major factor in peace building is the creation of clearer channels to disseminate information between the common people and policy makers. Women are “inherently peaceful, capable of preaching, teaching and preserving peace”, and women librarians therefore have key roles to play in the provision and dissemination of useful and accurate information on peace and peace movements and women’s groups, as well as fighting for freedom of access to information and improving the reading habits of women and children, among other things. African governments have to ensure access to current information by African women through the provision of functional libraries and Internet facilities for them to be properly informed and participate in global discussion and for them to be empowered.

The remaining papers in this issue were all presented in Seoul. The first, ‘The Role of a National Library in Supporting Research Information Infrastructure’, by Warwick Cathro of the National Library of Australia, describes the National Library’s role in a national programme to improve the nation’s research information infrastructure. The National Library has worked to digitize research resources, developed integrated discovery services, actively participated in three research information infrastructure projects, and worked with partners to develop solutions to the problem of sustaining university repositories to

support long-term access. The paper describes the project, Australian Research Repositories Online to the World (ARROW), which is developing a solution for institutional repositories in collaboration with a commercial vendor, and the Australian Partnership for Sustainable Repositories (APSR), where the National Library is helping to develop a sound approach to assessing the obsolescence risk of file formats, advising on a strategy for including preservation metadata in the repositories, and seeking to influence the future development of open source repository software to make use of preservation metadata.

The first of two papers dealing with government libraries and information services comes next. In ‘Governmental Libraries Development: an experience of strategic collaboration in the field of social sciences’, Maria Elena Dorta-Duque, Director of Scientific Information at the Higher Institute for International Relations in Cuba, describes the work and achievements of the Comité de Coordinación de los Centros que manejan Información Política y Social (COIPS), which is charged with promoting a closer relationship among governmental and non-governmental libraries and information centres that manage political, social and economic information and with developing collaborative projects, stimulating partnership, and the cooperation and coordination of specific tasks.

The second paper on this subject. ‘Government Information and Centers of Business and Legal Information in Russia’, by Emma Voskanyan of the Department of Official Publications at the Russian State Library in Moscow, describes how, building on the solid base of existing libraries, government reformers created business information centres, legal information centres, combined centres of legal and business information, electronic centres of legal and business information and centers of public access throughout the Russian Federation which, since the beginning of the programme in 1993, continuing to function very effectively up to the present.

Cooperation is the keyword in the next paper, by Wu Shushi of the National Library of China. In her paper, ‘Cooperation on Local History and the Concept of Network Building between Libraries, Museums and Archives in China’, the author outlines the cooperation in document conservation and cataloguing that has occurred between archives, libraries and museums in China.

It briefly describes The Digital Local History Project constructed by the National Library of China and proposes the concept of cooperation between archives, libraries, and museums in digitizing local history.

We close this issue, as we began, with a contribution from Korea. In her paper, 'Measuring the Impacts of Knowledge Management', Jong-Ae Kim of Dongbu Information Technology Company discusses the need for frameworks for evaluating the impacts of knowledge management on organizational performance and provides an overview of approaches to evaluating the contributions of knowledge management implementations to organizational performance. It presents methods

such as return on investment, balanced scorecard approach, qualitative case studies, and the success case method to aid practitioners to identify and develop the evaluation frameworks, and lays a foundation for further research and development in this field.

We hope that this collection of papers will reflect at least a part of the enormous range of topics and covered at the Seoul Congress as well as the wide geographical coverage of the papers. There was truly something for everyone in the Seoul programme, as there is at every World Library and Information Congress. Come to Durban in 2007 and see for yourself!

Libraries: prime movers for the age of knowledge and information

Dae-Jung Kim



Dae-Jung Kim was the 15th President of the Republic of Korea and 2000 Nobel Prize Laureate for his life long dedication to democracy and human rights in South Korea and in East Asia in general and also for the profound success of the 2000 Inter-Korean Summit Meeting. By choosing the long road of democracy, human rights and peaceful reunification, Dr. Kim had to endure many years of imprisonment, exile and house arrest. Though his life was constantly under threat, he overcame all oppression. During his time of imprisonment, he read hundreds of books on various topics, ranging from history, philosophy and economics to literature. Dr. Kim wrote many books. His book, *Prison Writings*, which is a book of letters that he wrote to his family after he was sentenced to death in 1980, was published in many countries around the world. His election in 1997 as the Republic's President marked South Korea's definitive entry among the world's democracies.

Abstract

Keynote Address to the World Library And Information Congress: 72nd IFLA General Conference And Council, 20–24 August 2006, Seoul, Korea, in the Opening Ceremony. Outlines the pivotal roles that libraries must perform in determining whether or not the age of knowledge and information will succeed in attaining its desired goals. Reviews the place of libraries in the intellectual and cultural traditions of Korea and efforts to develop these traditions in the 21st century.

Keywords: Libraries; Korea (Republic)

The World Library and Information Congress Seoul, Korea, Mr. Alex Byrne, President of the International Federation of Library Associations, Mr. Shin Ki-nam, Chairman of the Organizing Committee, Mr. Kim Myung-gon, Minister of Culture and Tourism of the Republic of Korea, Mr. Oh Se-hoon, Mayor of Seoul, Mr. Han Sang-wan, President of the Korean Library Association, distinguished guests, ladies and gentlemen,

I would like to congratulate the World Library and Information Congress on its opening today. I wish this magnificent gathering every possible success.

Ladies and gentlemen,

The early ancestors of mankind subsisted by hunting and gathering, wandering from place to place for a long time. Some 10,000 years ago they started building agrarian societies in the fertile plains and valleys along the Tigris and Euphrates Rivers, the Indus River and the Yellow River. From these agrarian communities were born city-states, where rulers and administrators maintained security and order for their citizens, attending to public administration and living environments. Amid such development knowledge arose, education spread, and libraries emerged here and there.

The old agrarian societies began their transitions to industrial societies in the mid-18th century. Expansion of intellectual activities in industrial societies, such as industrial production, international trade and transactions, and technological advancement, stimulated mass distribution of education and creation of libraries. Industrial production required land, labor and capital goods, which were all visible resources. Industrial societies continued their enormous material development throughout the 20th century.

Now, in the 21st century, the age of knowledge and information is in its high gear. In a knowledge and information-oriented society, creative brains become leaders of the economy and knowledge workers, not manual workers, are in great demand. This is an age when invisible knowledge and information take the role of prime movers leading all sectors.

I think the time has come for libraries to assume a role that is unprecedented in importance. Needless to say, libraries performed many important roles in the past agrarian and industrial societies. But those roles were only secondary and limited in scope. In the 21st century, libraries will perform pivotal roles in determining whether this age of knowledge and information will succeed or not in attaining its desired goals.

First, libraries should be repositories for all of the knowledge and information accumulated by humankind. They will have to store all kinds and forms of material and information. Today's advanced information technology is enabling libraries to accomplish this immense task.

Second, libraries should fulfill more dynamic roles. They should exchange knowledge and information with users inside and outside their country, thus going beyond their traditional reference and lending services.

Third, libraries should upgrade their services as "ubiquitous libraries" by digitalizing their resources for online use. These services should be accessible to anyone, regardless of time or location, through digital communication devices including personal computers, mobile phones and DMB (Digital Multimedia Broadcasting).

Fourth, it so far has largely been the privilege of the haves to receive a good education and attain knowledge of high quality. Nowadays, however, individuals around the world, no matter how poor they may be, can access whatever knowledge and information they need by visiting libraries via the Internet such as the U.S. Library of Congress and the National Library of Korea. All they need is a single personal computer. In the 21st century, the paramount role of libraries must be to provide economically handicapped individuals and nations with opportunities for intellectual contacts at the highest level. No other institutions can take this crucial role in removing dark shadows of the "information divide."

Fifth, libraries of the 21st century can help fight poverty and narrow the gap between rich and poor. The economy of our times depends no longer on visible resources and capital goods but on invisible knowledge and information. Therefore, poor nations as well as poor individuals can create wealth through active contacts and use of knowledge and information. For the first time in history the world is offering the poor invaluable opportunities to increase property and realize

upward mobility. And libraries are taking a central role in this notable movement.

The world will never achieve genuine harmony and peace without hope of eliminating poverty. Poverty lies at the roots of today's global unrest and raging terrorism. Those who are filled with anger and despair over their impoverished circumstances serve as hotbeds for terrorism, sheltering terrorists. Some partake in violent terrorism even at the cost of their lives. They need to see hope emerge from poverty by taking advantage of library resources. Those who are now drowned in the swamp of desperation will then turn their backs on terrorism. Stern measures against terrorists must be accompanied by charitable hearts showing the poor the way to find hope in their everyday life so they can resist temptations of terrorism.

Sixth, libraries should be expanded into open arenas for dialogue among civilizations. The ongoing confrontation between Christianity and Islam in the Middle East is driving the entire planet into insecurity and destruction. Mutual understanding, reconciliation and cooperation between the two civilizations will be impossible without dialogue. Instead, misunderstanding, distrust and hate will just continue to pile up. As a consequence, armed conflict and terrorism do not cease for a single day in our world today.

All library organizations in the world should work harder to increase mutual understanding, friendship and cooperation through dialogue and information exchanges between Islam and Christianity, suffering Africans and people of advanced nations, and East and West. These efforts will contribute significantly to uprooting terrorism and leading the world to peace, not to mention eradicating poverty. Libraries should become a driving force toward peace. And libraries should also become training centers for democratic citizens of the world to promote global cooperation amid diverse civilizations.

Distinguished participants, ladies and gentlemen,

Now, I would like to speak briefly about the intellectual and cultural traditions of the Korean nation and our efforts to develop these traditions in the 21st century.

In Korea the first library was founded in the fourth century by King Sosurim of the Goguryeo Dynasty. The following centuries saw the installation of

many repositories for books and documents in the royal palace, Buddhist monasteries, Confucian academies, public offices and private households. At the same time documentary culture continued to make remarkable development. Korea invented the world's first movable metal types in the 12th century, contributing radically to its print culture in terms of quality and quantity. *The Annals of the Joseon Dynasty*, a vast amount of records covering some 500 years beginning in the 14th century, is now included in the UNESCO List of the Memory of the World Register. Our ancestors established *Jiphyeonjeon*, a palace institute for academic research, the *Gyujanggak* palace library and *Sadae Mungo*, the Four National Archives, to preserve their intellectual resources. At *Hongmungwan*, the Office of Special Advisers, and *Seonggyungwan*, the National Confucian Academy, public officials and students actively made use of these intellectual assets to hone their scholarly abilities.

The civil service examinations, called *gwageo*, greatly contributed to development of knowledge and education in ancient Korea. Our nation never had a system for hereditary government posts. Even the son of a first state councilor, or *yeongeuijeong*, the equivalent of today's prime minister, could not join the government without passing state entrance examinations. This system was markedly different from Europe, where noble titles have been passed from father to son. As the state examinations were the only paths to officialdom, young men had to study hard to pass them and they needed library resources for their studies.

Buddhism and Confucianism from China introduced ancient high culture to Korea. Most of China's neighbors who accepted China's advanced culture were Sinicized. Even the Manchus who established the Qing Dynasty and ruled over China for almost three centuries were almost completely assimilated into Chinese society. It was an inevitable phenomenon of annihilation that occurs when culturally less developed people come in contact with advanced culture. Koreans were an exception, however. Our forebears passionately embraced Chinese high culture but they subjectively absorbed and re-created it. Thus they established their own schools of Buddhism and Confucianism enriched with their indigenous thoughts and cultural traits.

The clear cultural identity and popular zeal for education among the Korean public evolved into

an undaunted power to fight against political dictatorship for almost five decades. Hundreds of people lost their lives and thousands of others were imprisoned and tortured in harsh persecution. I had to face death no less than four times and spent six and a half years in prison and another 20 years in exile abroad or under house arrest and surveillance. But we never succumbed to dictators as we were armed with unshakeable confidence and burning aspiration for democracy. And we finally overcame the legacy of three successive authoritarian governments with the power of people. Korean democracy has thus been firmly set up on the rock.

In this new century, Korea stands on the forefront of the global wave of an age of knowledge and information. Underneath this dynamic advancement of Korean society is the nation's proud intellectual heritage and educational tradition and, no doubt, the power of people that won democracy through unrelenting struggle. I did my best to realize an age of information during my tenure as president. Now I believe the world is recognizing our accomplishments.

My government successfully implemented a policy to network all libraries across Korea and turn their resources into digitalized databases. New search systems were developed and electronic libraries were constructed. Through these efforts the foundation was laid for the "ubiquitous library" with a nationwide service system that can be easily accessed by anybody, anywhere, with any type of equipment. Today, library services are available everywhere – in farming villages, mountainous areas and remote islands.

Distinguished participants, ladies and gentlemen,

Let me emphasize once again. The 21st century is an age of knowledge and information. And this age calls for libraries to play a pivotal role in order to realize its ideals. As I have already mentioned, successful libraries will make a successful world. Libraries are the reservoirs for storing knowledge and information. Libraries are the locomotives pulling history forward. And you have the vital mission to drive these locomotives.

I hope that this congress will lead to historic momentum for libraries around the world so they rapidly progress in their activities toward faithfully completing their mission in the 21st century. I hope that you all have a pleasant and fruitful time in Korea.

Information Literacy Education in Asian Developing Countries: cultural factors affecting curriculum development and programme delivery

Daniel G. Dorner and G.E. Gorman



About the authors: page 293

Abstract

The prevailing models of information literacy education (ILE) are contextually grounded in Western social and intellectual structures. For the most part these models follow the taxonomy developed in the 1950s by Bloom, which has been adopted as appropriate for developing societies without considering the contexts from which they are derived, and in which they are being applied. For ILE to be meaningfully embedded in the educational fabric of a developing country, it is important to take account of a range of contextual variables that affect how and why individuals learn. Focusing on ILE through the lens of cultural contextuality, this paper addresses three questions in relation to ILE in developing countries: How do we define information literacy in a developing country context? How do we best determine the educational objectives of information literacy education in a developing country context? How can cultural awareness improve information literacy education?

Keywords: Information literacy; Information literacy education; Developing countries; Cultural context; Geert Hofstede

Introduction

Culture, maintains Cutler (2005) is like an onion, multi-layered and increasingly intense as one peels away each layer. The outer skin consists of subjective elements such as visible behaviour, relationship styles, thinking and learning styles, organization and work styles, communication styles. Beneath this surface layer are value systems and norms, shared values and accepted standards of behaviour; and at the deepest level are core cultural assumptions, what Cutler terms “basic ‘truths’ about human identity and purpose, space, time, social organization, ways of thinking and communicating that, for the most part, groups and their members are wholly unaware of” (Cutler 2005, vol. 1, p. 76).

In our view this way of visualizing culture is instructive and informative, and in the context of this paper may in fact be the key to what we are seeking to understand – the way in which information literacy education models and techniques appear to be imported from one culture (i.e., typically ‘developed’ and ‘Western’) to another (i.e., typically ‘developing’ and ‘Southern’). The onion-image of culture can be applied at many levels: groups, organizations, institutions, regions, nations, etc. But each level tends to anchor its sense of culture at a different layer. For example, a teaching team culture (or indeed any ‘team’ of individuals) exists primarily at the level of behaviour (the outer layer of subjective culture) and much less at the level of core cultural assumptions, whereas “national culture often resides less in practices and more in taken-for-granted values and assumptions” – that is, the inner layer of core cultural assumptions (Cutler 2005, p. 77).

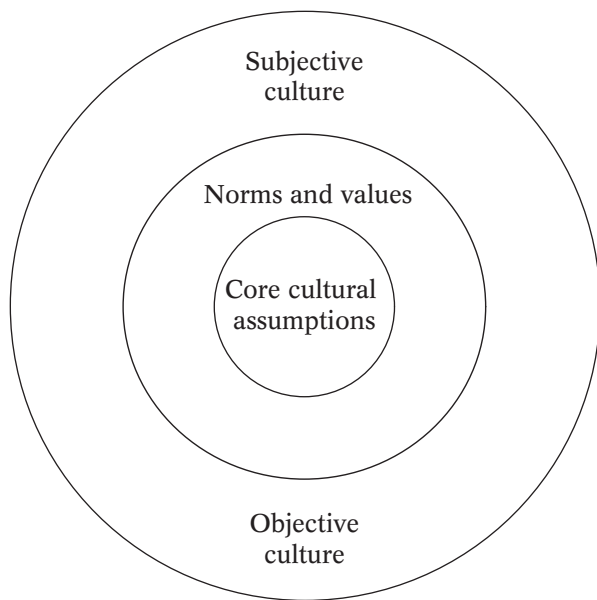


Figure 1. Cutler's Cultural 'Onion'.

In terms of information literacy education in developing countries these two quite different sets of cultural assumptions may well be setting up educational efforts for failure. A Western-influenced information literacy curriculum, based on Western norms and taught according to Western pedagogical practices, may not succeed when it focuses on behavioural changes (as indeed it must, according to how we currently assess educational results in terms of outcomes). This is because, beneath the outer layer of visible behavioural styles, and learning and thinking styles, the core cultural assumptions, which may well run counter to the surface changes, remain untouched. And it is these core values which ultimately determine the long-term 'success' of any education.

In other fields of education – school-level science, for example – this issue has received considerable attention over the years, with a common view being the disparity between science and daily cultures. This was put most succinctly by Aikenhead and Jegede (1999, p. 269), citing Maddock (1981), Aikenhead (1997) and Jegede (1995)

One major influence on science education identified by students in developing countries is their feeling that school science is like a foreign culture to them (Maddock, 1981). Their feeling stems from fundamental differences between the culture of Western science and their indigenous cultures (Aikenhead, 1997; Jegede, 1995).

Might the same situation hold when we investigate differences between the culture of what is essentially Western information literacy education and indigenous cultures in developing countries? And if this is found to be the case, does it not mean that information literacy education so conceived will never be more than superficial in developing countries, focusing on outer behaviours rather than core values? Aikenhead and Jegede (1999, p. 269) answer this for us when they state that a 21st century priority for educators is "...to develop culturally sensitive curricula and teaching methods that reduce the foreignness felt by students" – note the reference to both curricula *and* pedagogy.

In our view this issue of cultural influence on information literacy education in particular has received insufficient attention, yet it has major impact on the entire enterprise – from how we define information literacy, to how we seek to structure programmes, and to how we deliver information literacy content. The purpose of this paper is to open dialogue on such issues by raising questions for consideration.

Question 1: How Do We Define Information Literacy in a Developing Country Context?

We begin with the definition which has widest acceptance in Western countries as a standard guide to what is meant by 'information literacy'. As stated by the US Association of College and Research Libraries (ACRL), the definition focuses on specific skill-based outcomes:

a set of *abilities* requiring individuals to recognise when *information is needed* and have the ability to *locate, evaluate* and *use* effectively the needed information [our emphasis] (ACRL 2000).

On a superficial level this definition cannot be faulted – information literacy is indeed a set of abilities, and the whole concept is certainly built around an information need. From a pedagogical standpoint the outcomes could not be clearer: 'locate', 'evaluate', 'use'. And yet, like others in recent times, we feel uneasy about this definition because of its inherent limitations and constraints.

Simmons (2005), Norgaard (2004) and Luke and Kapitzke (1999), among others, have recently

highlighted what they regard as fatal flaws in this definition. We tend to agree with Simmons that the definition fails to question some basic assumptions about ‘information’, and instead assumes that it is naturally A Good Thing. In particular, according to Simmons (2005, p. 299),

Helping students to examine and question the social, economic, and political context for the production and consumption of information is a vital corollary to teaching the skills of information literacy. Additionally, facilitating students’ understanding that they can be participants in scholarly conversations encourages them to think of research not as a task of collecting information but instead as a task of constructing meaning.

Such questioning and raising of issues is the way in which information becomes knowledge, and is this not the ultimate goal of information literacy? (When we examine Bloom’s taxonomy this will seem to be the case.) Information does indeed exist in a context, and not to understand that is ultimately not to understand information, and thereby fail to use it effectively in knowledge generation. Information literacy, despite what many information professionals may believe, is not the simple collection of vast amounts of information – this is akin to the aeroplane mechanic collecting the various pieces of a jet engine and placing them in neat rows. This does not make a jet engine. Rather, it is the constructing of meaning from information that has true value – of learning how to fit the engine pieces together into a workable jet engine – and this is what information literacy must do if it is to be effective, most especially in developing countries, where information is increasingly recognized as a key tool for development.

The alternative view, and one which is fostered by the ACRL definition, is that information literacy is explained as a set of measurable skills (‘locate’, ‘evaluate’, ‘use’) – much like the traditional view of its parent discipline, literacy. “Literacy is too often conceived of in normative terms along a deficit model (literacy, of course, being something we “ought” to acquire). In such a model, information literacy can easily be reduced to a neutral, technological skill that is seen as merely functional or performative” (Norgaard 2004, p. 221).

Instead of these merely functional skills, we should see information literacy as learning how

to integrate and evaluate information in complex situations and within communication structures. Instead of a “skill-based paradigm that surely continues to haunt information literacy”, we need to conceive information literacy as “a process-oriented literacy” which puts it “in a far better position to communicate its inherent intellectual vitality and larger social and ethical relevance” (Norgaard 2004, p. 221).

Luke and Kapitzke (1999) carry this criticism into the lair of the supposed ‘experts’ in their critique of the influential work of Breivik and Gee, *Information Literacy: Revolution in the Library* (1989). In Luke and Kapitzke’s view, Breivik and Gee see knowledge as an external phenomenon, something the learner can reach out and grasp: “Seekers of ‘Truth’ can track it down and capture it either in the confines of the library or in a limitless cyberspace” (Luke and Kapitzke, 1999, p. 483). Using this approach, information literacy educators manage to avoid the principal concerns regarding knowledge – the social construction and cultural authority of knowledge, the political economies of knowledge ownership and control, and the development of local communities’ and cultures’ capacities to critique and construct knowledge (Luke and Kapitzke, 1999, pp. 483–484).

Of course, Breivik and Gee are not alone in this narrow, context-neutral, functional view of information literacy, as anyone familiar with current information literacy writing and resources can attest; the evidence ranges from such ‘big business’ approaches as the ‘Big Six’ – take a look at the marketing of this information literacy programme at <http://www.big6.com/> – to some of the most recent books on the subject: almost at random, we have N.P. Thomas’ *Information Literacy and Information Skills Instruction: Applying Research to Practice in the School Library Media Center*, 2nd ed. (Libraries Unlimited, 2004), D. Duncan and L. Lockhart, *I-Search for Success* (Neal-Schuman, 2005), etc.

All well-meaning, but with Luke and Kapitzke we would argue that

...these emergent information literacy frameworks are part of the problem – at best anachronistic and dysfunctional, at worst counter-productive in their avoidance of the central questions facing students, teachers and librarians about:

- the social construction and cultural authority of knowledge
- the political economies of knowledge ownership and control
- the development of local communities' and cultures' capacities to critique and construct knowledge (Luke and Kapitzke, 1999, pp. 483–484).

In summary, then, in our view there are serious shortcomings with the definition of information literacy when it is applied to developing countries. To begin with, it tends to reduce the process to a group of 'skill sets', and more particularly reduces it to a functional technological skill. Further, it does not question the basic assumptions about information, and how it becomes knowledge, assuming the latter to be some thing external that can be tracked down and captured like small wild animals.

Along with Luke and Kapitzke (1999), we believe the corollary to be that an effective, robust definition for developing countries is one that recognizes the social construction and cultural authority of knowledge, and works within this paradigm (wherever it may be). Further, information literacy, or information literate individuals, must become intimately familiar with the political economy of knowledge ownership and control, and this will determine their ability to access and understand information/knowledge throughout life. And finally, information literacy in developing countries in particular must involve the development of a capacity within local communities and local cultures to critique existing knowledge found by means of effective information literacy and to construct new knowledge on the basis of this critique.

Thus we are left with this operational definition of information literacy in developing countries:

The ability of individuals or groups

- to be aware of why, how and by whom information is created, communicated and controlled, and how it contributes to the construction of knowledge
- to understand when information can be used to improve their daily living or to contribute to the resolution of needs related to specific situations, such as at work or school
- to know how to locate information and to critique its relevance and appropriateness to their context

- to understand how to integrate relevant and appropriate information with what they already know to new construct knowledge that increases their capacity to improve their daily living or to resolve needs related to specific situations that have arisen.

Question 2: How Do We Best Determine the Educational Objectives of Information Literacy Education in a Developing Country Context?

It is widely recognized that Benjamin Bloom's classic work, *Taxonomy of Educational Objectives* (1956) is the framework behind, as far as we can determine, nearly all information literacy education programmes. His taxonomy has led to recent derivatives, such as Anderson and Krathwohl's *A Taxonomy for Learning, Teaching and Assessing* (2001). The characteristic categories in Bloom's Taxonomy are based on his understanding of the cognitive process, which he and his apostles see as a series of six levels (Figure 2).



Figure 2. Categories in Bloom's Cognitive Process.

Anderson and Krathwohl (2001) may use different terms, but the intention remains unchanged. That is, learning and educational outcomes are achieved in this process through a series of linked steps; one moves from knowing (knowledge of specifics) to understanding (interpreting, extrapolating) to applying to analysing (elements, relationships) to synthesizing (producing a communication or plan) and, finally, to evaluation (judging the results).

We believe that Bloom's taxonomy (1956) is used as a framework for constructing information literacy education programmes without thought being given to cultural aspects of education. Indeed, according to Anderson (2005, p. 107),

the original purpose of Bloom’s taxonomy was to reduce the amount of work involved in preparing annual comprehensive examinations. The reduction of labour in education was extended through the taxonomy to teaching in general by establishing an heuristic approach for teachers to produce the learning objectives needed for specific curricula, courses or classes, the learning activities required to achieve those objectives, and the forms of assessment/evaluation tasks needed to determine how well the students achieved the learning objectives. The taxonomy and its derivatives are, as mentioned earlier, used extensively in information literacy education programmes. We contend that because Bloom’s taxonomy was intended to achieve efficiency of the teacher’s effort in a Western cultural context, ILE programme designers elsewhere forget to consider the importance of culture.

Although later in this paper we will criticize this taxonomy and its deductive-style cognitive process, this is not to say that it lacks value in information literacy education. Indeed, we wish to emphasize that Bloom’s Taxonomy of Educational Objectives is quite consistent with the nature of information literacy education and its desired outcomes, and that it provides a valuable foundation (though not necessarily a rigid template) for developing more individualized information literacy educational taxonomies grounded in local cultural understandings. For example, one might use Bloom’s Cognitive Process to create an information literacy education model similar to that in Figure 3.

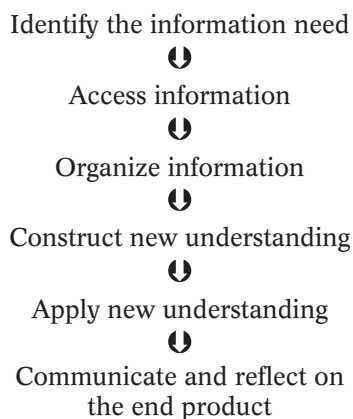


Figure 3. An ILE Cognitive Process Model following Bloom’s Taxonomy.

As clear, orderly and logical as this seems, we detect a number of issues arising from an attempt to impose this sort of structure outside a Western context. In the first instance, it assumes

that learners exist in some sort of intellectual and cultural void and that they all learn in the same structured ways (logically and consistently proceeding through the six steps in Figure 3). Second, it assumes that all learners are suitably reflective and individualistic in their learning styles (Figure 3, steps 4–6 in particular). Third, such a model fails completely to take account of culturally and socially determined differences, especially between developed and developing countries. Fourth, and in agreement with Luke and Kapitzke (p. 484), the model represents “...a linear-scientific method that [is] being superseded by other modes of inquiry, thinking and analysis currently being invented by, among others, students, researchers and scientists, teachers and librarians”.

These culturally and socially determined differences, we must remember, reflect the ways in which people feel, communicate and learn (as Figure 1 highlights). When we ignore these factors, we are forgetting how cultures differentiate and distinguish groups, and seek to impose a single cultural model that fails to account for these differences. Admittedly speaking of international students studying overseas, Zhai clearly highlights the stresses among students caused by “...different teaching methods, fast-paced class sessions, two-way interaction with professors in the classroom, more student participation in the class, more classroom and group activities, more reading and writing assignments, and more class study” (Zhai, 2002).

The same would apply to a Bloom-based information literacy education process that might be used in a developing country – a kind of educational imperialism, or at least a highly insensitive approach to education. The results of such an approach are well-documented in the literature of education in other disciplines. In their study of science education, for example, Waldrip and Taylor (1999, pp.289–290) found that programmes tend to be ‘imported’ without change, and certainly without due consideration for local culture. The results are what one might expect: there is a ‘school view’ of the world, or at least the world of a specific discipline or learning style, that is essentially a Western view; students ‘put on’ this view when they are in school and learning, and it has little to do with their culturally-based worldviews and therefore has little meaning. In effect, ‘this is what I am taught in school, yet this is the way life really is’.

In common with other investigators, among them Aikenhead and Jegede (1999) and Waldrup and Taylor (1999), we believe that what occurs in this situation is a downward spiral to educational failure, or rather the failure of classroom learning to become embedded in the learner's way of life. First, a disparity develops between the learners' worldviews and their school views; this gives rise to conflicting sets of values, one from within the culture, one imposed from without. To cope with this, the learners compartmentalize their values, as suggested above, with one set for the classroom, and another, real set for the world. Thus 'real life' learning fails – and whether we are discussing science education or information literacy education, above all else educators want their programmes to be embedded in 'real life' so that understanding becomes part of a lifelong learning process.

As this discussion suggests, we believe that a new approach to the structure and delivery of information literacy education in developing countries is imperative. Such an approach needs to incorporate understanding of how people learn in different environments, understanding of how culture affects the way we learn and teach, and an ability to contextualize information literacy education within the culture and society for which it is intended.

Question 3: How Can Cultural Awareness Improve Information Literacy Education?

This, in fact, is the most important question for those of us from developed countries who seek to contribute to the implementation of more robust information infrastructures in developing countries through information literacy and information literacy education. And as information professionals we start with some major disadvantages: most of us are neither trained teachers nor anthropologists, yet the skills of both professions are valuable in understanding how cultural awareness can contribute to 'better' information literacy education, and the training of information literacy educators in developing countries. To overcome these inherent weaknesses in our professional capabilities, we must rely on the expertise of colleagues in cognate disciplines.

In the last two decades or more, the work of one particular investigator has become increasingly

recognized as a valid means of understanding the impact of cultures on behaviour (including teaching and learning), on values and on core cultural assumptions – and here it may help to refer again to Figure 1. The investigator we refer to is Geert Hofstede, and his Five Dimensions of Culture as articulated in his seminal works, *Culture's Consequences: International Differences in Work-Related Values* (1980), and *Cultures and Organizations: Software of the Mind* (1991).

For those who may be unfamiliar with Hofstede's Five Dimensions of Culture, these are:

- 1 Power Distance
- 2 Individualism and Collectivism
- 3 Masculinity
- 4 Uncertainty Avoidance
- 5 Long Term Orientation

Much of the following is derived from, and explained in detail on, Hofstede's website (<http://feweb.uvt.nl/center/hofstede/index.htm>) and in his numerous writings noted in the list of references.

Power Distance (PD) refers to the degree of equality, or inequality, between people in a society. It is the extent to which the less powerful members of organizations and institutions (for example, the family) accept that power is distributed unequally. This represents inequality as defined from below, not from above. It suggests that a society's level of inequality is endorsed by the followers as much as by the leaders. A high Power Distance ranking for a country or society indicates strong inequalities of power and wealth, whereas a low Power Distance ranking suggests that society places much less emphasis on differences between power and wealth.

Individualism (IDV) – with its opposite, Collectivism – refers to the degree to which a society reinforces individual or collective achievement and interpersonal relationships. Individualism addresses the degree to which individuals are integrated into groups. A high Individualism ranking suggests a society in which the ties between individuals are loose, and everyone is expected to look after his and his family's needs above all else. A low Individualism ranking suggests a collectivist approach, with people from birth onwards integrated into strong, cohesive in-groups, often extended families which

protect them in exchange for unquestioning loyalty.

Masculinity (MAS) focuses on the degree to which society reinforces the traditional masculine role model of male achievement, control and power. Masculinity (and its opposite, femininity) reflects the distribution of roles between genders. According to Hofstede, (a) women’s values differ less among societies than men’s values; (b) men’s values from one country to another contain a dimension from very assertive and competitive (seen as ‘masculine’), to modest and caring (seen as ‘feminine’). Women in feminine countries have the same modest, caring values as the men; in the masculine countries they are somewhat assertive and competitive, but not as much as the men, so that these countries show a gap between men’s and women’s values. Thus a high Masculinity ranking suggests a high degree of gender differentiation, with the masculine role model dominating, and low Masculinity ranking indicates a low level of differentiation between the genders.

Uncertainty Avoidance (UA, or UAI for Uncertainty Avoidance Index) addresses a society’s tolerance for uncertainty and ambiguity, and indicates to what extent a culture programmes its members to feel either uncomfortable or comfortable in unstructured situations. Unstructured situations are ‘novel, unknown, surprising’, and uncertainty-avoiding cultures seek to minimize the possibility of such situations by strict laws and rules, safety and security measures, and by maintaining that ‘there can only be one Truth and we have it’. In contrast uncertainty-accepting cultures are more tolerant of opinions different from the norm, and they try to have as few rules as possible. A high Uncertainty Avoidance ranking reflects a society’s low tolerance for uncertainty and ambiguity, while a low Uncertainty Avoidance ranking suggests that a society is more flexible and accepting of varied opinions.

Finally, *Long Term Orientation* (LTO), according to Hofstede, deals with ‘Virtue regardless of Truth’. Values associated with Long Term Orientation are thrift and perseverance; values associated with the opposite of LTO, Short Term Orientation, are respect for tradition, fulfilling social obligations, and saving face. A high LTO ranking would mean that perseverance and thriftiness predominate in a culture or group, whereas a high STO ranking would suggest that respect for tradition and social obligations predominate. In our view this is the

least convincing of Hofstede’s categories, and he does indicate that this was derived differently from the other four categories.

What does this cultural categorization look like in practice? The simplest way to answer this is to compare the profiles of three countries as determined by Hofstede – New Zealand, Thailand and South Korea, for example. Looking at Figure 4, we see that New Zealand is characterized by a low PD (or PDI, Power Distance Index) and a high IDV; that is, for New Zealanders there is little distinction between people’s power and wealth, and they value individuality very highly. In Thailand and South Korea, on the other hand, a high PDI and low IDV indicate that there are strong inequalities based on power and wealth, and that individuality is less valued than collectivism. The remaining three dimensions show equivalent disparities between New Zealand and the two Asian countries. While the disparities across the dimensions of culture are not consistently different between Western countries and Eastern ones, we can see in Table 4 the similarity between Thailand and South Korea and the difference of those two with New Zealand.

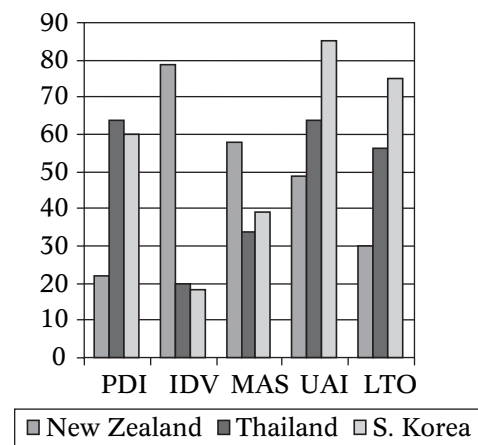


Figure 4. New Zealand, Thailand and South Korean profiles.

Factors such as these begin to highlight specific issues related to the use of Western or Western-derived ILE models and pedagogical methods in developing countries. In the remainder of this paper, we shall examine these issues in the context of Hofstede’s Dimensions of Culture. In *Culture’s Consequences* (2nd ed., 2001) Hofstede examines the implications of the dimensions on a variety of life situations – some that relate specifically to a particular dimension (e.g., masculinity and femininity in gender roles) and some (e.g., the family, work) that relate to all of the cultural

dimensions. Of particular interest to us is his examination of the implications of four of the dimensions for schools and educational systems, and of the fifth dimension – Long Term/ Short Term Orientation – on ‘ways of thinking’, which also relates closely to our discussion here.

We shall now examine what Hofstede says about the implications on schools and educational systems and ways of thinking, and then ask questions about how these views apply to the cognitive process for ILE as derived from Bloom’s taxonomy so that we can respond to the question, How can cultural awareness improve information literacy education?

According to Hofstede (2001, p. 100), the Power Distance dimension has large implications in conceptualizing any educational endeavour. He points out that the basic values from parent-child relationships are reflected in teacher-student relationships. Therefore, in a society with a high PD score, there is a large distance between parent-child and teacher-child “that caters to the need for dependence well-established in the student’s mind” (p. 100). In a society with a low PD score, teachers treat students as relative equals and expect to be treated similarly by students, and “the system is based on the students’ well-developed need for independence” (p. 101). The teaching process in a high PD society is teacher-centric, with teachers outlining with the students “the intellectual paths to be followed” (p. 100), whereas in a low PD society it is student-centric, with learners being expected to determine “their own intellectual paths” (p. 101). And the quality of a student’s learning in a high Power Distance society “is virtually exclusively dependent on the excellence of his or her teachers”, whereas in the low Power Distance society it is largely “determined by the excellence of the students” (p. 101).

The Individualism dimension affects not only students’ willingness to act individually, but also the ease with which they interact with others and, ultimately, their reasons for learning. As Hofstede notes (p. 234), a person’s relationship with groups is established in his or her consciousness during the early years with family, and developed and reinforced further at school. In a collectivist society students form in-class subgroups based on ethnic or clan backgrounds, which makes it more difficult than in an individualist society to assign joint tasks that will lead to the formation of new

groups (p. 234). In the individualist society “group formation among students is much more ad hoc according to the task or to particular friendships and skills” (p. 235). Saving face and maintaining harmony are extremely important in the collectivist classroom, whereas in the individualist classroom “confrontations and open discussions of conflict are sometimes considered salutary” (p. 235) – that is, very important to the learning process. In a collectivist society it is important not to lose face; therefore, students do not speak up in class. Conversely, in the individualist society the notion of losing face is not an issue, so speaking up in class is considered desirable, and good teachers “are supposed to reinforce students’ self-esteem” (p. 235).

Of greatest importance to our discussion of information literacy education is the difference in the perceived purpose of education in individualist and collectivist societies. Hofstede states that “in the former, education is seen as aimed at preparing the individual for a place in a society of other individuals. This focus means learning to cope with new, unknown, unforeseen situations” (p. 235). In collectivist societies, on the other hand, “education stresses adaptation to the skills and virtues necessary to be an acceptable group member. This focus leads to a premium on the products of tradition” (p. 235). In collectivist societies education is reserved for the young, ‘who have to learn *how to do* things’ in order to participate in society, and in individualist societies it is ‘not so much about *how to do* things as it is to know *how to learn*’, because learning never ends and people need skills to get along in today’s world (p. 235).

Masculinity and femininity impact on education in terms of evaluation, among other things. Brilliance and academic reputation, from Hofstede’s perspective, are used for evaluating the performance of teachers in highly masculine societies, as opposed to friendliness and social skills in highly feminine societies (Hofstede 2001, p. 303). For students, academic performance is used as the main criterion for evaluating performance in societies with high Masculinity ratings, whereas the students’ social adaptation is used in highly feminine societies. “Failing in school is a disaster in a masculine culture ... Failure in school in a feminine culture is a relatively minor incident” (p. 303). Public praise, awards for excellence, and competitiveness (including competitive sports) are used in high Masculinity countries, whereas

in feminine countries teachers do not generally praise good students (though they may encourage weaker students through praise), and competition is not actively encouraged (competitive sports are extramural activities).

Interestingly, and of great relevance to information literacy educators, Hofstede notes that in a study of three literacy skills (reading, writing and numeracy), “respondents in masculine countries rated themselves as excellent more often than did equally skilled respondents in feminine countries” (p. 304). Hofstede (p. 305) point out that field dependence is a feminine characteristic, possessed by individuals who generally rely on external frames of reference as guides to behaviour. Field independence, on the other hand, is a masculine characteristic possessed by individuals who perceive an object separately from its and their environment. Field-dependent individuals (and therefore students in highly feminine societies) possess better social skills, whereas field-independent individuals (and therefore students in highly masculine societies) possess better analytical skills.

Uncertainty Avoidance, according to Hofstede (2001), is a dimension that relates to the amount of structure desired in education activities. He explains that “when uncertainty avoidance is relatively strong ... both students and teachers favour structured learning situations with precise objectives, detailed assignments, and strict timetables” (p. 162). In societies with weaker Uncertainty Avoidance, structure is despised by students and teachers who instead prefer “open-ended learning situations with vague objectives, broad assignments, and no timetables at all”. Students in societies with high Uncertainty Avoidance prefer assessment with only one correct answer and expect recognition for accuracy, whereas those in low Uncertainty Avoidance societies believe that “where there can be only one correct answer is taboo ... [a]nd they expect to be rewarded for originality” (p. 162). In high UA countries, students expect teachers to be experts ‘with all the answers’ who use cryptic academic language and should not be challenged; but in low UA countries students respect teachers who admit to not knowing all the answers and who use simple language to explain complex concepts. Students in low UA countries consider intellectual disagreements with teachers as stimulating academic exercises. In high UA countries students are more likely to attribute their

success or failure to external factors such as good or bad luck, whereas in low UA countries students are more likely to attribute success or failure to internal factors such as their own effort or ability – or lack thereof.

As mentioned earlier, Hofstede (2001) does not examine the implications of Long Term Orientation (LTO) on schools and education. Rather he focuses on its implications for “ways of thinking” (p. 362). The discussion is complex and includes, for example, reference to the impact of LTO on how cultures think about good and evil, and about equality and justice. Considering that the top five positions in the LTO index of 23 countries (Hofstede, p. 356) are held by East Asian countries and that Western countries (at least from a cultural perspective) such as Germany, Australia, New Zealand, the United States and Great Britain are all located in the bottom half of the scale, we can see that differences in LTO between East and West are quite strong.

Of importance to our current subject is Hofstede’s discussion of how the different logics of “East and West followed different paths ... in developing science and technology” (p. 364). Hofstede contends that Western Truth derived from an ideal of rights-based individualism and stimulated analytical thinking, whereas Eastern Virtue derived from an ideal that emphasized the inter-relatedness of individuals and led to synthetic thinking (p. 364). As an example, he talks about the success of Japanese companies in taking Western analytically-derived technologies and putting them into practice by making use of their own synthesizing abilities. He goes on to point out that “high-LTO cultures prove to be well equipped for solving...well-defined problems; low-LTO cultures seem to try more heuristic approaches, even where problems can be basically structured.” Thus, while Asian students tend to do very well in basic mathematics which requires solving well-defined problems with clear paths to correct and incorrect responses, they are less successful in scientific subjects which require solving more open problems where the correct answers cannot be determined by following a clear-cut path. Students in low LTO countries do better in structured problem solving, whereas those in high LTO countries perform better in fuzzy-problem solving (p. 367).

We can now examine each of the steps in the Information Literacy Taxonomy as we ask the

question, How Can Cultural Awareness Improve Information Literacy Education? To answer this question we begin by examining each of the steps in the Information Literacy Taxonomy (Figure 5).

Following Figure 5, the first step in the taxonomy is *Identify information need*. A New Zealand teacher might well say “we need to take a problem-solving approach here so that each student can relate the concept of an information need to a problem that he or she has. Each student can then address the problem and solve it”. Based on framing the first step in this way, the New Zealand teacher will develop learning activities around tasks that focus the students on gaining an understanding of information literacy as a process that starts by equating their individual needs with problems to be solved through the application of information. The first step in the taxonomy then provides the logic for creating the ‘plan of attack’, which leads into Steps 2 (*Access information*), 3 (*Organize information*), 4 (*Construct new understanding*) and 5 (*Apply new understanding*). In a country such as New Zealand, which has a low Power Distance value, it may make perfect sense pedagogically to frame the first step this way. However, we need to ask, does framing the first step in this way make sense pedagogically in all cultures when we consider the Dimensions of Culture?

In New Zealand teachers expect students to ‘develop their own intellectual paths’, and the students themselves expect and want to be asked to solve their own problems as a means of achieving independence. Given New Zealand’s high Individualism, the expectation of teachers and students is for the learning process

to prepare students to take their places in a society of individuals – therefore, it makes sense pedagogically to teach students how to identify their information needs as individual problems so that they can learn to fend for themselves and get along in the world.

In New Zealand, with a moderately high value on the Masculinity index, it may make good sense for teachers of information literacy to develop learning activities in which students relate identifying an information need to a competitive challenge to which they must apply their analytical skills. New Zealand’s relatively low Long Term Orientation score also makes it appropriate for an information literacy teacher to demonstrate to students skills such as how to conduct searches of library catalogues, online indexes, full-text databases, the World Wide Web and so on, and to show the students how to use software such as EndNote to organize information, and to explain how to analyse it to derive the most relevant information to come to a new understanding and to solve the problem.

Thailand and South Korea have low scores in Individualism and Masculinity – in other words, Thai and South Korean cultures exhibit characteristics of high collectivism and high femininity. They also have relatively high LTO scores. Therefore, we need to ask, In East Asian nations such as Thailand and South Korea would cooperative group work be more pedagogically sound for learning than competitive individual tasks? Would it be better for the teacher to explain how to identify an information need (Step 1 in Figure 5) by providing the students with a clear example of a situation or problem that they as a group can improve or resolve through the use

Hofstede’s Dimensions of Culture	Information Literacy Taxonomy
1. Power distance	Identify information need ⬇
2. Individualism	Access information ⬇
3. Masculinity	Organize information ⬇
4. Uncertainty avoidance	Construct new understanding ⬇
5. Long-term orientation	Apply new understanding ⬇
	Communicate and reflect on the end product

Figure 5. Dimensions of culture and the information literacy taxonomy.

of relevant information? Recall that in countries such as Thailand and South Korea, which have high Power Distance ratings, Hofstede (2001, p. 100) suggests that students will be familiar and comfortable with a teacher-centric approach to learning and will be accustomed to learning through the provision of clear paths to follow. Therefore, we are compelled to ask whether students in Thailand and South Korea would learn about Steps 2 through 5 (Figure 5) better if the teacher provided an example of a situation or problem, i.e., an information need, for which a group followed clearly defined steps: to locate information, to organize it, to come to a new understanding through the process of synthesis by relating the found information to what they already knew, and finally to apply to the situation or problem.

In a country such as New Zealand, with a relatively low Uncertainty Avoidance score, it is not surprising to find that university library staff will seek the cooperation of academic staff to embed information literacy education in the curricular, teaching, learning and assessment processes. The rationale here is that students will learn about information literacy much better in the context of a real information need. In a country such as South Korea, which has a high Uncertainty Avoidance score, we must ask, How would the students react to a library-based programme being embedded in their 'academic' courses, and affecting their final assessments? From the organizational perspective it is possible for librarians in New Zealand, which has a low Power Distance rating, to request academic staff to work with them on information literacy education. The librarians and academic staff are relatively equal in status and power; therefore, they are comfortable working cooperatively. In South Korea, which has a moderately high Power Distance rating, the ability to embed information literacy education in the curricular, teaching, learning and assessment processes might not be possible because of the barriers to cooperation posed by inequalities between library and academic staff.

The final step in the Information Literacy Taxonomy is to communicate and reflect on the end product. As already discussed, in a country such as New Zealand it might make pedagogical sense to embed information literacy programmes in the actual curriculum, with specific learning activities based on the students' individual information needs for actual assignments in their courses. New

Zealand students live in a culture with low Power Distance, high Individuality, moderately high Masculinity, moderate Uncertainty Avoidance, and low Long Term Orientation. Taking these factors into consideration, it may well be appropriate to hold information literacy classes or tutorials during the period when the students are working on their assignments, and to ask the students to discuss and share their successes and failures with respect to the various steps related to information literacy.

In addition to the actual assignment for the course that was used to embed information literacy instruction, it might also make good pedagogical sense to require the students to maintain a journal about their efforts and experiences as they progressed through the steps in the Information Literacy Taxonomy – reporting matters such as where they searched for information, how successful the searches were, the criteria they used to determine relevance, how they organized the information and so on, and ultimately to reflect on what they learned with respect to the process. The journal would help them reflect on what they have learned because in an individualist culture like New Zealand's, education is about knowing how to learn – which, after all, is what information literacy is all about. In New Zealand, which has a relatively low LTO score, in a final class or tutorial in an information literacy programme after the assessment activity has been completed, it might be useful pedagogically to have the students discuss the heuristic approaches they used to resolve their information needs.

We need to ask, what is the best way to teach students to communicate and reflect on the resolution of their information need? The final step in the taxonomy must relate back to what the students experienced through the learning activities. Whereas embedding information literacy education into the curriculum of core subjects might be sound pedagogical practice in New Zealand, it might not be so for students in South Korea or Thailand, countries which have high Power Distance, low Individuality, lower Masculinity characteristics, moderate to high Uncertainty Avoidance, and high Long Term Orientation. Would embedding information literacy into core academic courses and making it a part of the courses' assessment cause undue stress for the students, and perhaps lead to information anxiety? Information anxiety is caused by the inability to access or understand the

information one needs, by information overload, by lack of clear organization of information and by the inability to incorporate it into what is already known. Would students in classroom discussions or in individual journals share their experiences about unsuccessful, as well as successful, strategies because of fear of losing face?

In countries such as South Korea and Thailand, and indeed in developing countries everywhere, we need to ask, how do cultural dimensions of a country, region or community affect the manner in which the students learn to be information literate? What would be good pedagogical strategies in individual cultures for teaching information literacy? Clearly, programmes derived directly from Western countries such as New Zealand, Australia or Britain would not provide good pedagogical practices for application in East Asian countries.

To answer the question, 'How do cultural dimensions of a country affect the manner in which the students learn to be information literate?' we need to ask questions such as the following:

- What is the best definition for information literacy in developing countries?
- What is the best way to frame the initial identification of the information need?
- Would students gain understanding more quickly by working in groups or as individuals on information literacy activities?
- Would students learn more effectively about information literacy if the teacher provided examples to follow rather than requiring students to 'learn by doing'?
- Would student learning be more successful in embedded contexts than in artificial ones?
- What is the most effective way to encourage students to communicate their results and to reflect on the outcomes?

In this paper we have begun to reassess our understandings of information literacy education in a developing country context. We have focused on three main questions:

- How do we define information literacy in a developing country context?
- How do we best determine the educational objectives of information literacy education in a developing country context?
- How can cultural awareness improve information literacy education?

Our discussion has led to more questions than answers. To continue the quest for answers to these questions, it is necessary for fieldwork to be conducted in developing countries. Indeed, immediately after this conference we will begin such research on the cultural dimensions of information literacy education in Laos, Cambodia and Thailand. The results of our fieldwork investigations will be reported in a subsequent paper.

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Note

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Using Assessment as a Tool to Improve Learning: an IFLA Workshop

Leslie Murtha, Eileen Stec
and Marilyn Wilt



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Abstract

Three librarians from Rutgers University Libraries collaborated on the program 'Using Assessment as a Tool to Improve Learning' at the 69th IFLA General Conference and Council in Berlin, Germany in 2003. The workshop was designed to provide participants with an expanded understanding of assessment, and experience with using it effectively as a tool to facilitate improved learning. The presenters framed the workshop with a pre-workshop assessment and post-workshop assessment. The responses from the pre-workshop assessment supported the workshop's design, provided an initial understanding of the individual participants' contexts and experiences, and formed the basis for the workshop's small group activities. The post-workshop assessments offered valuable suggestions for future programs. The article shares the essence of the workshop in the words of the facilitators, each of whom focused on assessment at a different level. The three modes discussed are teacher/instructor, learner/student, and programmatic/institutional.

Keywords: Information literacy; User education; Library instruction; Assessment; Evaluation; Testing; Learning; Teaching; Planning; Best practices

Introduction

A workshop program entitled 'Using Assessment as a Tool to Improve Learning' was presented at the 69th IFLA General Conference and Council in Berlin, Germany, in August 2003. The half-day workshop focused on supporting enhanced student learning in information literacy programs and on creating programs and structures that 'fit' into an institution's organizational context and support multiple styles of learning and pedagogy.

The workshop was planned and facilitated by the authors of this paper. Approximately 40 librarians from around the world attended the workshop, which included multiple discussion groups and active learning activities. Two weeks before the workshop, pre-registered participants were asked to respond to a short series of open-ended questions about their experience with assessment. The responses to the survey were used to support the design of the session; they provided the facilitators with an initial understanding of the individual participants' contexts and experiences, and formed the basis of one of the workshop's small group activities. The post-workshop assessment, administered at the end of the session, consisted of a small number of open-ended questions about the participants' experience of the workshop. The responses contributed to a shared understanding of the ideas that emerged from the workshop, and offered suggestions for future programs at subsequent conferences.

In preparing and conducting the workshop, the facilitators modeled the use of the iterative 'Assessment Cycle', which is centered on

the successful achievement of goals and intended outcomes (see Figure 1).

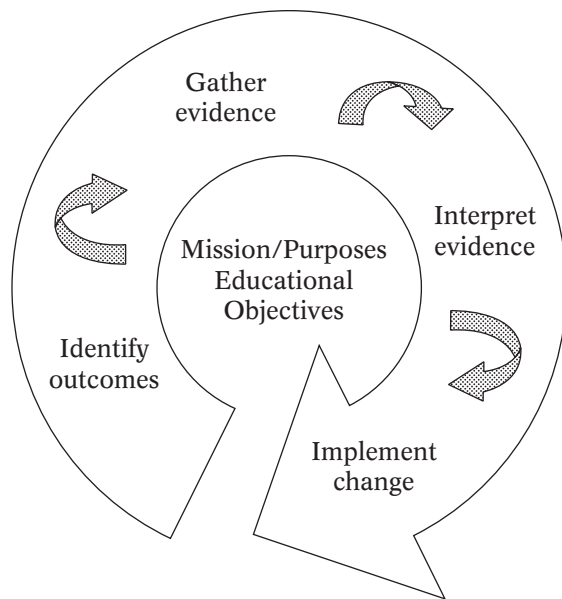


Figure 1. Assessment Cycle, developed by Peggy Maki (2004, p. 5), PhD, of the American Association for Higher Education. Reproduced by permission of the author and publisher.

The four stages of the cycle relate to the implementation of the workshop as follows:

- Gather Evidence = Pre-workshop Assessment
- Interpret Evidence = Workshop Design
- Make Decisions ... = Facilitated Learning, Small Group Activities
- Implement Outcomes ... = Post-workshop Assessment

The workshop was designed to provide participants with an expanded understanding of assessment, and experience with using it effectively as a tool to facilitate improved learning. After an introductory overview of the three basic types of assessment (*prescriptive*, *formative*, and *summative*), and their uses in a variety of contexts and environments, the workshop moved into discussions of effective assessment from three perspectives: teacher/instructor, learner/student, and programmatic/institutional. In this way, the facilitators and the participants collaborated in constructing the emergent learning from the workshop. Each participant received an extensive bibliography, to offer resources to explore following the workshop.

To capture the experiences of each section of the workshop, here are descriptions of each in the facilitator's own words.

Assessing the Teacher/Instructor

Leslie Murtha

When we attempt to assess student learning, we are taking the most direct possible approach to measuring the success of our instruction efforts. Learning is, after all, the desired outcome. There are, however, many factors that influence how well students learn. One of the most important factors that influence learning is teaching.

Librarians have for many years engaged in activities to assess various aspects of library instruction, but until recently little attention has been paid to the quality of teaching. In recent years, research, theory, and practice relating to this topic have begun to emerge in the library literature, but there is not yet a significant body of work that can provide a solid basis for study. In order to develop a framework for thinking about the assessment of teaching, it is necessary to turn to the literature of the field of education. Here, one finds an abundance of research, and the challenge is to find appropriate ways to apply it to the practice of library instruction.

Most of the available research is based on practices in schools, which makes its direct application to the assessment of teaching in libraries problematic. Teaching practices appropriate for adult learners are not well addressed, and the frequently made assumption of a sustained relationship between instructors and learners does not often hold true for library instruction. Additionally, most of the literature originates among the wealthier, developed nations, and takes little account of the extreme disparities in available resources, and the extraordinary diversity of cultural contexts to be found in the international library world. Nonetheless, many strategies used in school settings can be adapted to the library classroom.

In a systematic approach to the assessment of teaching, there are generally five steps to be undertaken:

1. determine the purpose of the assessment
2. define and describe what 'good teaching' means in the context of the program
3. select the methodologies to be used
4. develop or select tools with which to apply the methodologies

5. develop standard processes and procedures for implementing and interpreting the assessment.

Assessment Purpose

It is very important that all parties concerned understand the purpose to which the results of the assessment will be put. Three general purposes for undertaking to assess teaching are:

1. **Prescriptive or diagnostic assessment:** used to determine the level of competence or expertise of the teacher, to pinpoint problems or areas in need of development. Prescriptive assessment is commonly utilized when working with novice or student instructors, but might also be used to determine progress in the development of instructors. Uhlenbeck, Verloop, and Beijaard (2002) discuss research that suggests that teachers pass through definable stages of development from novitiate to expertise. Applying this idea to library instruction might yield some interesting results.
2. **Formative assessment:** used to provide the instructors with feedback about their teaching in order to support their professional development. While it may be used to pinpoint problems or areas for development, it also is used to track progress and affirm accomplishments. It is inherently a collaborative, rather than a judgmental process, and is appropriate for instructors at any stage in their career or development. Most of the discussion of teaching assessment in the library literature revolves around formative assessment.
3. **Summative assessment:** used to provide administrative support for decisions about instructor abilities or competence. In a library setting, summative assessment results could be used to match teachers to classes, as well as for making personnel decisions. As will be seen later, most of the approaches used for formative assessment can also be used for summative assessment, though they would be implemented differently. Neal (1988) and Rifkin (1995) discuss the difficulties involved in attempting to make assessment strategies serve a dual purpose, and the issues that are inherent in the assessment of teaching.

Defining Good Teaching

Teaching is a complex behavior, and no consensus exists on precisely what teaching is, much less on

what makes it good. Descriptions of good teaching are highly subjective and incorporate both tangible and intangible elements (Barrett, 1986). It is generally agreed that good teaching means effective teaching, but learning is not a product that can be delivered intact from teacher to learner. Students share responsibility for the construction of their learning. Good teaching depends also on context. As Barrett notes, methods and techniques may differ from subject to subject. They may also be constrained by circumstance and resources. In an international context, it is also important to note that approaches to teaching are embedded in culture, and what is effective in one environment may not work in another.

Any definition of good teaching will be a synthesis of professional and institutional values, generally accepted characteristics, and local factors. Arnold (1998) suggests that the process of crafting a definition, although challenging, is an inherently valuable exercise. Some common categories that may be incorporated into the definition are:

- organizational abilities
- planning and preparation
- knowledge of subject
- knowledge of education theory
- communication skills
- classroom management skills
- pedagogical repertoire
- use of assessment
- fairness
- quality of feedback
- concern for students' needs
- respect for diversity.

Assessment Methodologies

A number of methodologies can be used to assess teaching. Each has its strengths and weaknesses, and some are better suited to one purpose than another. Ideally, a program of assessment would include several complementary approaches, in order to provide a multi-dimensional representation (Neal, 1988). A brief description of the approaches commonly employed is provided below. For a more comprehensive overview, see Knapper and Cranton (2001).

Personal reflection is essential to all thoughtful teachers. Critical reflection may be an individual effort, or a group activity, and can be structured into a formal assessment process. Probably the best resource on the topic is Brookfield (1995).

Interviews are relatively easy to plan and implement, but their value and validity are influenced by the skills and biases of the interviewer. Interviews are most effective when used in conjunction with other methodologies (Barrett, 1986).

Competency tests usually measure minimum competence in the areas of testing (Barrett, 1986). Tests can be used to demonstrate either theoretical knowledge of teaching or subject knowledge. Testing as a way of assessing teaching in libraries is currently limited almost exclusively to school libraries. In the US, some states have developed their own tests for school media specialists, and others employ the standardized Praxis series (Perritt, 2000).

Observation has the advantage of supplying direct information about classroom interaction, but is also particularly vulnerable to subjectivity and bias. In order to achieve meaningful results, observers must be trained, and provided with a structure for their observations. Valuable insights into practical and ethical considerations relating to instructor observation can be found in Rifkin (1995), Boyd (1989), and Neal (1988).

Learner evaluation surveys are the most commonly used method of assessing library instruction (Ragains, 1997). They are generally held to supply limited data about learning, but can provide interesting insights into the classroom environment. They can be used to measure the learners' attitudes toward and perceptions of the instructional experience, as well as the learners' *self-efficacy*, or perception of their ability to use the content of the lesson. Used in combination with other measures, learner surveys can supply valuable information about the affective dimension of the learning experience. When used to assess instructors, it is important to note that the validity of the data derived from such surveys is influenced by the fact that it derives from the perceptions of novices (Rifkin, 1995).

Measurements of student learning outcomes may be employed as a determinant of teaching effectiveness, but cannot be the sole criterion for making judgments about the quality of teaching, because many factors beyond the control of the instructor affect student learning. When combined with other measures, learning outcomes represent an important dimension of teaching quality. A related approach is to look at learner achievement

over time. This longitudinal approach can provide information about achieving long-term, meaningful goals, but it is also difficult to attribute the achievement to any isolated factor, such as teaching quality. In most cases, this approach is most valuable as part of a multi-faceted programmatic assessment.

Portfolios have long been used to document professional development for teachers. Academic librarians and others who prepare packets of exemplary materials for reappointment, tenure, or annual review will be familiar with the portfolio concept, but the idea of preparing a portfolio focused on teaching is relatively new to libraries. Information about the process of developing a teaching portfolio can be found in Doolittle (1994), Lally and Trejo (1998), Erazo and Beck (1998), and Chapman, Perrway and White (2001).

Developing Tools for Assessment

Having chosen a methodology – or preferably, a set of complementary methodologies – for conducting an assessment of teaching, the next step is to adapt or develop an instrument with which to conduct the assessment. An assessment using learning outcomes would employ whatever instrument was used to measure student learning, but it would still be necessary to determine how to interpret the results as a reflection of teaching effectiveness. For most other types of assessment, the instrument would generally take the form of a list of questions or statements that reflect the values expressed in the definition of good teaching articulated by the organization. Accompanying this list of questions or statements would be a list of appropriate answers, exemplary behaviors, characteristics, and/or documents that would be considered evidence of good teaching. Even for a relatively informal, collegial approach to assessment, some form of guidelines would be needed to give structure to the process.

When developing or adapting an instrument for any type of assessment, there are three important concepts to be considered:

1. instrument validity – the instrument truly measures the quality of teaching
2. instrument reliability – it will return the same results consistently under similar conditions
3. instrument objectivity – it measures teaching fairly, without privileging or disadvantaging any

individual, environment, or valid approach to pedagogy.

Since teaching is complex, improvisational, and highly personal, it is difficult to ensure that all these criteria are met, but if they are disregarded, the assessment is meaningless.

There are few standardized instruments for measuring teaching in libraries, but a number of resources can aid in the development of questions or checklists, as well as in the defining of good teaching. A list of 84 proficiencies for instruction librarians developed by a subcommittee of the Bibliographic Instruction Section of the Association of College and Research Libraries (Shonrock and Mulder, 1993; Wittkopf, 1990), has never been published in its entirety, but 25 are listed by Shonrock and Mulder (1993). Arnold (1998) supplies a valuable correlation of traits with teaching behaviors. From a project at the University of New Mexico, Botts and Emmons (2002) provide a list of teaching competencies for instruction librarians, and Ware (2002) discusses the adaptation of a freely distributed standardized instrument to the assessment of teaching in libraries. Another valuable resource is the list of competencies for teacher librarians issued by the Association for Teacher-Librarianship in Canada and the Canadian School Library Association (1997).

Assessment Implementation and Development of Process Evaluation Standards

The last stage of the process is the actual implementation of the assessment. To prepare for this, it will be necessary to establish conditions and procedures for the collection of data. Depending on the methodologies to be employed, and the purpose of the assessment, decisions will need to be made about who will collect the data, and who will have access to it. Schedules will need to be developed, and conditions for the collection of data agreed upon. Any necessary equipment must be obtained, and if manipulation of numeric data is expected, programs must be prepared for data entry. Participants should be trained in the techniques of data collection that are to be used, as well as in ethical considerations. If the project is expected to result in any form of publication, the institution's requirements for research with human subjects should be reviewed, and arrangements made to meet any pertinent requirements.

Assessing the Teacher/Instructor: Conclusion

While establishing formal programs for the assessment of teaching in library instruction is not a simple process, a well-designed program can pay dividends both by supplying information about the overall quality and success of the instruction programs and by supporting the ongoing development of instructors in the program. Examples of teaching assessment programs for user education can be found in Isbell and Kammerlocher (1994) and Middleton (2002). Additionally, a number of libraries have established peer-coaching systems for instructors, taking formative assessment programs a step further, to create long-term supportive relationships between instruction librarians (Burnam, 1993; Levine and Frank, 1993).

To review: key considerations when developing a program assessing good teaching are:

- be clear about the purpose; develop clear criteria for evaluation
- involve the instructors in the process
- provide clear guidelines for administering the assessment (including models), and training for the instructors and evaluators
- use multiple, complementary methodologies
- get help from other departments with experience in assessment
- regardless of the purpose of the assessment, be sure that you provide feedback to the instructors.

Assessing the Learner/Student

Eileen Stec

This section provides brief descriptions of tools used for assessment and evaluation of learners or students. These tools can also be used for teacher and program evaluation. They are described under three categories: prescriptive, formative and summative. Many of them can be used interchangeably for different purposes; for example, summative assessment results may be used prescriptively to inform the next semester's learning plan. A critical point to remember is that all assessment should be linked to learning outcomes. If you create learning outcomes, the assessment should flow from those outcomes.

Prescriptive or Diagnostic Tools

Surveys

One popular method of assessment used – indeed, overused – by librarians, is the survey. Surveys are useful to determine students' feelings or opinions about a teaching method or their perceived skill levels. They do not assess learning.

Surveys can tell us what people plan to do in the future, or what they recall having done in the past. People's intentions may not accurately predict their actions and a person's memory may not be accurate. Many librarians learn to use some latitude in assessing the information that a patron supplies during the reference interview.

Surveys can be open-ended, like these three questions that participants were asked to answer before the workshop:

1. How would you like to use assessment in your library?
2. Please describe your library and the people who use it.
3. Briefly, describe one assessment technique you have tried. Was it successful?

The answers to these questions revealed that workshop participants had different levels of research experience. Some had never assessed before, and others were ready to embark on institution-wide assessment.

A survey can be used to ask participants what actions they have taken or expect to take, to elicit opinions, and to determine self-efficacy. In one example, graduating seniors at the University of California at Berkeley were asked which specific library research tasks they believed they could accomplish. The researchers then tested the students' actual knowledge with objective questions. The combined results showed that students believed that their skills were more advanced than the objective results proved (Maughan, 2001).

Surveys may use various scaling systems to provide numeric equivalents for the respondents' beliefs or opinions. A web resource published by William Trochim (2002) demonstrates the concepts behind different scaling systems.

Surveys can help to identify the parts of the instruction that a learner 'liked' or disliked. They

do not indicate what the participant learned. A very useful article by Williams (2000) demonstrates the creation of different types of questions requiring the learner to choose from limited selections, as well as questions to which the learner responds in his or her own words.

Objective Tests

This method can be used to test large numbers of students efficiently and quickly. Difficulties can arise when members of the test group who do not share the same understanding of the meanings of words, or who come from different cultures, give *different* correct answers. For example, during the workshop there was no universal agreement regarding the use of the term *assessment*, versus *evaluation*. Had a multiple-choice question been administered to this group using the word 'assessment', the results would reflect this confusion, rather than testing the knowledge of the participants.

A set of objective test questions testing information literacy skills, known as Project SAILS (Standardized Assessment of Information Literacy Skills), has been prepared by a group at Kent State University, and is currently being retooled (Radcliff et al., 2006) at universities in the United States and Canada.

Interviews and Focus Groups

Because they are facilitated, focused conversations, individual interviews and focus groups can provide unexpected information. They can be very valuable, but require time, skill and resources to complete successfully. Kitzinger (1995) stresses the importance of using an outside person to facilitate or observe the group. Using an outside facilitator reduces the possibility that the researchers will direct the discussion, and also reduces the possible introduction of bias because the participants perceive the researchers as representatives of the library.

For those who have not begun formal assessment, another way to anticipate the skill level of learners is to read the information literacy literature, and gather anecdotal accounts from other library instructors. Proceed with caution; not all anecdotal information or 'shared beliefs' among colleagues are accurate. Occasionally you come upon a gem like the *Mind Set List* created every year by the staff at Beloit College, in Wisconsin

(USA). This list prepares the faculty to look at the world through the experiences of the new first year class of students. Items review technology that has ‘always existed’ for the 18 year olds entering school, cultural icons the faculty know about, but the students do not, and experiences the students are likely to have had, but that the older members of the faculty are not. Examples from the 2003 list include such wisdom as “Travel to space has always been accomplished in reusable spacecraft;” “they [the students] have spent more than half their lives with Bart Simpson;” “Yugoslavia has never existed” (Beloit College, 2002). While this list is mostly appropriate to US culture, readers are encouraged to look for these jewels within their own communities. E-mail lists allow material like the *Mind Set* list to be discovered and shared.

Formative tools

Formative tools require either that some time elapse between instruction sessions, to reassess the learner’s progress, or that quick changes to the instruction can be made during class to match the learner’s needs. Most readers are probably familiar with the short quiz during a class, but in the online world new opportunities are developing. For example, one librarian described monitoring the progress of students using her online tutorial, TILT (Texas Information Literacy Tutorial) (Dupuis, Simpson and Fowler, 1998). As the students work through the section on preparing a search strategy, they are required to create and type keywords into a dialog box on the web page and hit a submit button. These answers are stored in a database and reviewed by the librarian to see if students are developing appropriate keywords. She can expect certain words and not others because each student has chosen a tutorial covering a specific subject, for example, Internet business or security and privacy (Dupuis, 2002, personal communication).

Annotated bibliographies can be prepared several times during a course, before a final research paper is due. The course instructor or librarian can quickly discover if a student is finding appropriate material. This technique is particularly helpful early in the course.

The audience response system used in some medical schools in the US is particularly helpful in a large lecture course. Each student is given a keypad as they enter the lecture. The instructor has prepared questions to display on a screen in front

of the class at different times during the lecture. Students see the question displayed followed by a screen telling them to ‘answer now’. The results are instantly tabulated and the instructor knows if the class understands the material being presented.

Carol Kuhlthau (2004) requires students to create and submit a research log. Students identify the titles of books or articles they have discovered, and show the instructor how they found the citations (and that they can find them again) through a call number, web address or journal title. In addition, the student rates how useful the material will be for the final research paper.

A *concept map* helps students identify research topics and add ideas as they are discovered in the literature. The map provides a pictorial representation of topic development. This visual representation seems more helpful for some students than writing about or verbally describing their research. A web exercise created by librarians at Pennsylvania State University (C. Wright et al., 2002) has been used by the author in many classes to support students in clarifying their research questions.

Summative tools

Portfolio reviews have become very popular at the author’s university, though they are yet to be used for information literacy assessment. Portfolio reviews require the instructor to develop a scoring rubric. A rubric is a standardized tool used to measure learning. Mertler (2001) categorizes scoring guides or rating scales into two categories, holistic and analytic. Citing *Educational Assessment of Students*, by A. J. Nitko, he explains that “a holistic rubric requires the teacher to score the overall process or product as a whole” (2001, ¶ 2). Citing works by Moskal and Nitko, Mertler goes on to describe how, in an analytic scoring system, “... the teacher scores separate, individual parts of the product or performance first, then sums the individual scores to obtain a total score” (Mertler, 2001, ¶ 2). The template shown in Table 1 describes the basic form for a holistic rubric (Mertler, 2001, Table 1).

To see how the holistic scoring rubric in Table 1 might be used in practice, imagine an instructor reviewing a student assignment in which the student is required to provide complete citations, call numbers and locations for three books and locate and list catalog subject headings associated

Score	Description
5	Demonstrates complete understanding of the problem. All requirements of task are included in response.
4	Demonstrates considerable understanding of the problem. All requirements of task are included.
3	Demonstrates partial understanding of the problem. Most requirements of task are included.
2	Demonstrates little understanding of the problem. Many requirements of task are missing.
1	Demonstrates no understanding of the problem.
0	No response/task not attempted.

Table 1. Template for holistic rubrics.

with the same books. A score of 5 would indicate that the student completed all the tasks (provided all the information and the subject headings matched the books selected). A student who included correct citations for additional materials not required for the assignment would be assessed as showing advanced ability and effort. By comparison, a score of 3 would indicate that an important element of the assignment was missing (or wrong); either call numbers, citations or subject headings, but not all three.

An example of an analytic scoring rubric is the ‘Web Site Evaluation Checklist’ (Anderson et al., 1999). This walks a student through the process of evaluating individual parts of a website. Individual criteria either add or deduct a point value. For example:

- 2. Is original posting date given? Y/N. Y = 1 pts. N = -1 pts. (Anderson et al., 1999, p. 1)

The additive scores rate a website on a scale ranging from *Poor* to *Excellent*. This rubric could also be used by the instructor to evaluate the students’ understanding of the various criteria. For additional information and resources on creating and scoring rubrics, see Moskal (2000) and Nitko (2001).

Citation analysis can be used to review the final product of the student’s learning. The analysis would examine the breadth, depth, and authority of the sources cited by the students. One big advantage is that the students don’t have to do any additional work in order for the librarian to obtain data. It is not an intrusion on their time. Students

must prepare a list of citations for their papers to fulfill the requirements of the assignment. The authenticity of the data makes this a very powerful assessment tool.

Faculty comments on the quality of student research or the effectiveness of library instruction are very difficult to obtain in any detail. Their focus is to get on with their classes. Ask for their comments as a courtesy, but informal discussion may not provide sufficient detail to be useful. Generally, comments like “great job” or “it helped the students” are too vague for assessment purposes.

Tools under development

Several groups are developing assessment tools for information literacy. Among those are the previously mentioned Project SAILS. The Educational Testing Service, based in Princeton, NJ, is working with several American college and university systems to develop a method for the online assessment of information literacy and digital technology skills (Educational Testing Service, 2003); in Australia, the Council of Australian University Librarians (CAUL) has also been developing information literacy standards (Appleton, 2002).

Assessing the Program/Institution

Marilyn Wilt

Assessment at the institutional level is designed to determine whether students can demonstrate

the integration of learning from individual courses into a coherent whole (their undergraduate or graduate experience). Programmatic assessment examines an academic or co-curricular program, such as a library instruction or information literacy program, to discover its influence on student learning. Assessment at either the programmatic or institutional level attempts to measure the extent of student learning, both in individual courses and in the overall program. The assessment plan may incorporate an examination of teaching effectiveness, and may also scrutinize the institutional services and resources that support student learning. Ideally, assessment of the information literacy program is an integral part of the institution's systematic assessment of all curricula.

The scholarship of assessment suggests that there are six key elements to success in programmatic or institutional assessment:

1. broad-based involvement of stakeholders throughout the institution in both the design and the implementation of the plan
2. mutually agreed-upon goals and objectives for learning
3. a well-designed, thoughtful assessment plan
4. multiple, flexible data collection methods
5. broad communication of the findings to the academic community, and timely development and implementation of recommendations based on the findings
6. timely monitoring and ongoing re-examination of the full assessment process.

The process of developing and implementing a program- or institution-wide assessment plan is an inherently collaborative one. Maki (2004, p. 181) states that “a commitment to assessing for learning translates itself into institutional practices that visibly represent an institution's level of commitment.” Similarly, Palomba and Banta suggest that the assessment plan “captures agreement about what matters, gives direction for actions, provides means to determine if progress is being made” (1999, p. 8).

In order to be successful, institution-wide assessment needs to have a clearly defined purpose that is grounded in the institution's mission and goals. All stakeholders should be included in the development and design of the assessment process and in its implementation. Open-ended and ongoing communication is key to:

1. developing the assessment plan
2. educating all stakeholders concerning their roles and responsibilities in the assessment process
3. building a shared understanding of the process and the intended outcomes, so as to encourage all constituents to support or ‘buy into’ the process
4. designing strategies for applying the results of the assessment
5. providing feedback to all stakeholders, including students, faculty, administrators, trustees and directors, alumni/ae, and the surrounding community.

Three scholars who provide valuable models for program- or institution-wide assessment plans are Maki, Palomba and Banta. Maki (2004) provides visual depictions, concise, coherent descriptions of processes, concrete examples, and exercises to aid institutions in initiating or improving their assessment plans. Banta (2002) provides and illustrates a list of characteristics of effective outcomes assessments, and together with Palomba (1999) synthesizes assessment scholarship with practical advice.

Maki portrays the institutional assessment process visually in the ‘Iterative Assessment Cycle’ (2004, p. 5, Figure 1.3). The cycle centers the assessment process on the institution's mission/purposes, objectives/goals and intended outcomes. Evidence is gathered, analyzed, and interpreted. The data is used to inform decisions regarding

- program improvement
- enhanced student learning and development
- enhanced institutional services and resources
- appropriate budgets, institutional policies and procedures.

As the resulting changes are implemented, the cycle begins anew, identifying outcomes of the changes, and gathering new evidence (Maki, 2004, p. 5).

Banta (2002, pp. 262–263) defines the institutional assessment process in three phases: *planning*, *implementation*, and *improving and sustaining*. In the planning phase, she stresses the importance of starting where the institution is – at the point when the need for assessment has been identified. The planning process must allow sufficient time for development of support, and for educating stakeholders in their roles and responsibilities

in the emergent plan. The planners need to be patient, and, at the same time, persistent and focused in pursuing their intended results. Effective communication is considered vital in all phases, but particularly in planning.

Planners must educate and engage the community, building a shared understanding of the process and its intended outcomes, and enlisting support and cooperation. The function of this broad-based stakeholder involvement is to develop consensus across participating groups as to the purpose of the assessment, while enabling them to have a voice in shaping the plan. The results of the assessment have both formative and summative functions; they provide information for improvement, and also support decisions for future planning and allocation of resources (Palomba and Banta, 1999).

Palomba and Banta suggest the incorporation of multiple levels (e.g. course, program, department) into assessment plans, and emphasize the importance of “link(ing) results to other educational processes, such as curricular review and planning and budgeting” (Palomba and Banta, 1999, p. 9). The assessment methods should be “linked to the goals and objectives for learning and to the instructional activities that support the goals” (1999, p. 11).

The implementation phase, as described by Banta (2002), is characterized by working with the plan, making adjustments as necessary – a dynamic process. Institution-wide communication is also critical in this phase, as the planners share with the stakeholders information about what is working and what is not, and ask for their feedback.

Palomba and Banta (1999) suggest that both direct and indirect data collection methods be employed; doing so will help to ensure that a rich and multidimensional picture will emerge from analysis of the data. Examples of direct methods include objective tests and performance measures; both qualitative and quantitative data may be collected. Indirect methods include surveys and interviews. Using multiple methods ensures flexibility, and adds to the reliability and validity of the assessment process. Decisions that flow from a broad-based analysis will be supported by stronger and more persuasive evidence.

The third stage, which Banta (2002, p. 263) characterizes as “improving and sustaining,”

enables the planners/designers to build on their experiences working with the plan, potentially adding new elements, deleting others, checking both internally and externally for feedback and guidance. Palomba and Banta (1999) stress the importance of regular reexamination of the assessment process itself. Some measures should be used repeatedly over time to provide continuity, while others may be dropped, and new ones added. Palomba and Banta see a dual purpose for institutional assessment; the results of the process may be used both to “improve programs and [to] communicate with the public” (1999, p. 18). Institution-wide communication as part of the improving and sustaining phase builds understanding and encourages support for continued assessment.

Both models of institutional assessment are non-linear, with interesting parallels. Banta’s planning phase, beginning with an identified need, corresponds with the process of identifying outcomes and defining methods for evidence gathering that is described in Maki’s cycle. Banta’s implementation phase, working with the plan and adjusting as necessary, parallels Maki’s progression from gathering, interpreting and analyzing the evidence to making decisions about potential changes, based on the analysis of the data. Finally, Banta’s improving and sustaining phase corresponds with Maki’s description of implementing changes in policies, services, and curricula, developing new intended outcomes and appropriate methods for gathering evidence (Banta, 2002; Maki, 2004).

While scholars of assessment emphasize the importance of establishing an iterative cycle that connects assessment to improvement, a cautionary note is sounded by Ewell, who observes that “most campus assessment activities continue to be implemented as *additions* [italics original] to the curriculum, designed for purposes of program evaluation rather than being integral to teaching and learning” (2002, p. 16). Ewell further suggests that an emphasis on the assessment process as an end in itself disassociates the assessment from the goal of improvement and divorces the process from the routine concerns of the university community.

As an aid to understanding how assessment may be applied to an information literacy program, or to an institution-wide context, here are two examples of assessment projects in higher

education. Characteristics described in the models developed by Maki (2004) and Banta (2002) can be traced in the State University of New York's assessment of its general education curriculum (including information literacy), and the University of Wollongong's development and assessment of its information literacy program.

State University of New York [USA] System-Wide Assessment of General Education Courses

The State University of New York (SUNY) is a state-supported comprehensive higher education system encompassing 64 institutions, including 2-year, 4-year, graduate-level, technical, and distance education programs. Planning was initiated in the late 1980s for the system-wide assessment of general education courses at SUNY. This initiative came in response to the Provost's call for "revitalization of assessment plans" throughout the system. The stated goals of this initiative were to "improve institutional performance" and "demonstrate effectiveness in undergraduate education" (Tutzauer, 2005).

During the 1990s, as part of the planning process, the University ran a series of symposia designed both to educate the various constituencies and to provide a forum for dialogue on general education. By the end of the decade, it was concluded that assessment at the campus level was probably more effective and fiscally feasible than system-wide assessment (Francis and Steven, 2003; Tutzauer, 2005).

The dialog initiated in these symposia continued as a special task force was established to explore the assessment of undergraduate learning. The process that emerged from this dialog among faculty and other stakeholders, known as *Strengthened Campus-Based Assessment*, builds on an existing campus assessment plan entitled *General Education Assessment Reporting* (GEAR). This plan includes the use of external instruments such as the *National Survey of Student Engagement* (NSSE) as well as locally developed instruments. The combination of standardized and local instruments enables the analysis of the data to support system-wide and national comparisons while situating the results in the context of the academic climate of the particular campus. Communication of the assessment results is guided by five principles that are designed to reflect the uniqueness of individual

campus' improvement processes and also to provide aggregate data that may be used by SUNY as a whole to address public concerns about accountability (Francis and Steven, 2003).

Beginning in the academic year 2006–2007, all SUNY campuses will be required to conduct a *Strengthened Campus-Based Assessment* in basic communication (writing), critical thinking, and mathematics. This system-wide assessment across these three subject areas will be in addition to existing campus-based assessment (State University of New York, 2006).

For more details about the SUNY assessment initiative, check out:

<http://www.cortland.edu/GEAR/>
http://web.alfredstate.edu/assessment/OFFICE%20OF%ASSESSMENT_2005.htm
<http://www.geneseo.edu/~assess/gened/>

The SUNY assessment process is dynamic, incorporating lessons learned as the plans are implemented. The development of the process included elements of all three phases of institutional assessment that Banta (2002) identifies, including providing adequate time for the development of a shared understanding of the process among all stakeholders. The implementation process readily flows into the improving and sustaining stage.

Information Literacy and the Assessment of its Integration into the University Curricula at the University of Wollongong, Australia

The University of Wollongong is a comprehensive research institution situated in New South Wales. The integration of information literacy into the curricula at the University has been anchored in the University's mission statement since 1990 (L. Wright, Lipu and Smithers, 2006), and continues to be reflected in current planning documents. Research skills, communication skills, computer literacy, skills in logical exposition, and competence in the use of statistical concepts will be expected of all graduates (University of Wollongong, 2004).

The University has integrated tertiary literacy (which they define as "academic literacy, information literacy, computer literacy, statistical literacy, and professional practices") into many of their curricula, and has identified it as an important component of the academic program.

Tangible objectives and strategies for achieving these goals were written into the University's *Learning and Teaching Strategic Plan 1997–2005* (University of Wollongong, 2005). The University's definition of seven information literacy standards conforms to the *Information Literacy Standards* of the Council of Australian University Librarians (Bundy et al., 2004).

The planned integration of information literacy into the curricula was tied to a University-wide communication and education process, designed to build awareness and understanding of the required skills among faculty, staff, and students. Throughout the 1990s, information literacy was integrated into several University core subjects. To assess the extent and effectiveness of this initiative, the University worked with an external consultant, and developed a new measurement tool introduced in 2005 to provide expanded assessment data (L. Wright, Lipu and Smithers, 2006).

Examination of the documentation relating to the development of information literacy at the University of Wollongong reveals that, throughout the planning and implementation of the planned integration of tertiary literacy into the University curricula, ongoing and broad-based communication among all stakeholders was essential to success. As they 'worked their plan' and introduced assessment tools into their process, they used what they learned from the collected data to inform their continued improving and sustaining of the information literacy program and of the assessment process (L. Wright, Lipu and Smithers, 2006).

It would appear that both SUNY and the University of Wollongong are working to ensure that their assessment activities are a vital, integral part of their institutional activities, and not just an *addition* to the curriculum, against which Ewell (2002) so eloquently cautions.

Conclusion

The IFLA workshop, 'Using Assessment as a Tool to Improve Learning,' brought together three librarians from Rutgers University Libraries (USA) with approximately 40 participants from academic libraries from the United Kingdom, Australia, France, Germany, Scandinavia,

and Africa in energetic conversation around assessment practices that actively support learning and shared understanding. Using the 'Iterative Assessment Cycle' as a lens to focus presentation and discussion, the participants reflected on the assessment processes either contemplated or in place in their respective institutions, and discussed ways to strengthen their processes by grounding them in their institution's mission and goals. They examined assessment from three different (but interrelated) perspectives – the teacher/instructor, the learner, the institution. These three perspectives are presented in this article to share the collaborative learning and to continue the dialogue.

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Methodology	Activities that can be assessed	Advantages	Disadvantages	Issues
Personal reflection	Performance Knowledge Interpersonal skills Teaching Strategies Attitudes	Only one participant necessary Personal Based on direct experience	Very subjective Difficult to maintain on regular basis Requires practice	
Interview	Experience Attitudes and philosophy Theoretical knowledge Subject/discipline knowledge Communication skills Professional involvement	Easy to schedule Requires minimal coordination	Dependent on quality of communication No direct experience of teaching competence required Expertise/training Open to bias	Most interviewers are not trained
Competency testing	Theoretical knowledge Subject/discipline knowledge	Thoroughness External implementation Objectivity Establish baseline Knowledge	Assesses only knowledge, not performance Validity open to question	Few tests available for library instructors Most instructors meet minimum competence standards
Observation	Knowledge base Organization and preparation Performance Interpersonal skills Pedagogical repertoire Classroom management Attitudes	Flexible schedule Provides at least one source of expert judgement Based on direct experience	Takes time Requires structure Requires coordination Requires training Open to bias	May be perceived as threatening May cause or exacerbate personal conflicts Open to manipulation Instructors need to be involved in development of criteria

Appendix I. Methodologies for assessing teaching.

(Appendix I continued)

Portfolios	Knowledge base Experience Philosophy and attitudes Organizational abilities Communication skills Pedagogical repertoire Creativity Professional involvement	Flexible schedule Provides multiple sources of information Items selected by instructor	Takes time Requires training Items selected by instructor May not reflect reality of classroom	
Learner evaluation	Performance Subject/discipline knowledge Interpersonal skills Organization and preparation	Easy to administer Inexpensive Generally considered reliable	Open to bias Validity questionable	May be more highly correlated with popularity than effectiveness Students not equipped to judge some aspects
Learner competence	Effectiveness	Direct measure of success	Difficult to administer May be expensive	Teaching is only one factor Other factors outside control of instructors
Learner achievement	Effectiveness	Direct measure of success	Difficult to obtain data May be expensive	Teaching is only one factor Other factors outside control of instructors

Intellectual Property: benefit or burden for Africa?

Denise Rosemary Nicholson



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Abstract

This paper highlights some of the issues affecting access to knowledge in South Africa and other African countries, as well as the implications of international intellectual property agreements, focusing mainly on copyright. It will show that the majority of these countries are struggling to meet the very basic requirements of international intellectual property agreements, yet some of them are being pressured by developed countries to adopt even stricter intellectual property regimes through the Intellectual Property Chapter or 'TRIPS-Plus' in Free Trade Agreements. The paper highlights the impact of some of the TRIPS-Plus provisions on education, libraries, and people with sensory-disabilities, as well as public health and development in general.

Keywords: Intellectual property; Copyright; Access to knowledge; TRIPS-Plus; Free trade agreements; Africa

Introduction

Africa has 34 least-developed countries and 20 developing countries. They are all sovereign states, with different laws and jurisdictions.

South Africa is classified as a 'developing country' by the World Intellectual Property Organization. Although it has a high-tech, developed dimension, it has a much larger 'third-world' or 'developing' dimension, where half the population lives below the poverty line.¹ There is a high level of illiteracy, and 40 percent unemployment seriously affects development. 54 percent of the total adult population has not completed a general level of education,² while 42.5 percent of the total population is under the age of 19 years.³ Access to information and education are vital for South Africa and the region. However, serious socio-economic factors, together with restrictive intellectual property laws, hamper the process. If South Africa, 'the Powerhouse of Africa' and most developed country in Africa, is burdened with such problems, consider how far greater the problems are for the rest of Africa.

What is Intellectual Property?

Intellectual property refers to creations of the mind and is divided into two categories: "Industrial property, which includes inventions (patents), trademarks, industrial designs, and geographic indications of source; and Copyright, which includes literary and artistic works such as novels, poems, plays and computer programs, films, musical works, artistic works such as drawings, paintings, photographs and sculptures, and architectural designs. Rights related to copyright include those of performing artists in their performances; producers of phonograms in their recordings; and those of broadcasters in their radio and television programs."⁴

The Intellectual Property Situation in Africa

African countries have different priorities. For most, if not all of them, illiteracy, unemployment, lack of infrastructure and resources, famine, disease, conflict, crippling debt, and mere day-to-day survival are far more pressing issues than intellectual property, especially copyright.

The Western concept of copyright protection is foreign to many African countries, since collective ownership has been their tradition. In many countries, copyright laws were imposed and implemented under colonial rule and have not been updated to meet their current needs.

For industrial property (i.e. intellectual property excluding copyright), there is a cooperative agreement between the World Intellectual Property Organization (WIPO) and the African Regional Industrial Property Organization (ARIPO), the African Intellectual Property Organization (OAPI), as well as the African Regional Centre for Technology, which promote protection for rights-owners.⁵ However, until recently there has been no copyright cooperation or harmonization in Africa. Some countries, like South Africa, have limited exceptions for education and libraries, whilst other countries have virtually none. The stricter the copyright law, the more non-compliance there tends to be.

To date, only eight countries (namely, South Africa, Zimbabwe, Kenya, Nigeria, Togo, Malawi, Zambia and Uganda) have reprographic rights organizations to clear copyright permissions, but not all of them are fully functional.

Current copyright regimes in Africa are inappropriate and fail to address the legitimate needs of education, libraries and people with visual and auditory disabilities. They restrict or prohibit access, thus making knowledge available to only those who can afford it.

Importance of Access to Information

Article 19 of the United Nations Universal Declaration of Human Rights states:

Everyone has the right to freedom of opinion and expression; this right includes freedom to hold opinions without interference and

to seek, receive and impart information and ideas through any media and regardless of frontiers.⁶

The International Federation of Library Associations and Institutions (IFLA) and its initiative, Freedom of Access to Information and Freedom of Expression (FAIFE), state:

Freedom, prosperity and the development of society depend on education, as well as on unrestricted access to knowledge, thought, culture and information. This right to intellectual freedom is essential to the creation and development of a democratic society. The state of intellectual freedom in libraries is an important indication of the progress of democracy in a nation.⁷

The former South African Minister of Trade and Industry, Mr. Alec Erwin, stated:

Knowledge is not a commodity, and can never be one. Knowledge is the distillation of human endeavour, and it is the most profound collective good that there is... Education must embrace the intellectual, cultural, political and social development of individuals, institutions and nations. This 'public good' agenda should not be held hostage to the vagaries of the market.⁹

Copyright – A Barrier for Education and Libraries

Copyright is a barrier to accessing information and exchanging knowledge in Africa. Below are some typical examples which educators, librarians and students are faced with, when applying domestic copyright laws in their countries. The pendulum has swung too far in favour of rights owners and consumers' rights have been eroded.

As sheet music may not be copied at all, a lecturer applies for permission to copy a few pages of music for a small group of students. The rights-owner demands a high fee and lays down restrictive conditions. His lecture is delayed, and finally, he has to use alternative material. Not surprising if he does not apply next time!

A distance learner has to pay high copyright fees for all his study material, as there are

no copyright exceptions. Unlike many developed countries, African countries have not been able to take advantage of the legal flexibilities in international intellectual property agreements, due to lack of resources to implement them into their domestic laws. As a result, there are no provisions for distance learners.

Copyright law prohibits a blind student from converting his textbook, or even a portion of it, into a more accessible format, e.g. Braille. He tries to access an electronic book but copyright technological protection measures block the 'text-to-speech' software. He tries to download an electronic article from an electronic database to email, but the licence prevents this, so he is unable to access the information via a voice-synthesizer. He cannot browse in the library, since there are no facilities or legal provisions for him to convert even a small portion to Braille. Copyright protection measures prevent him from exercising his fair use rights.

A deaf person has sign language as a first language, Zulu as a second language and English as a third language. She needs to translate and adapt information from various works, before converting it into a more visual format for study purposes. Copyright law prevents her from making any translations, conversions or adaptations before obtaining copyright permission and paying royalties. (More broadly, copyright affects translations into indigenous languages. A third of the world's languages are spoken in Africa.¹⁰ Consider then, how copyright restrictions hamper translation and exchange of information for research and teaching purposes on the continent.)

A librarian is restricted from digitizing a valuable collection, which is fast deteriorating in condition, as copyright clearance is necessary for each item. Some rights owners are untraceable, some refuse permission, some charge high fees or lay down strict conditions. Should copyright restrictions lock up this valuable knowledge indefinitely?

Unfortunately due to lack of resources, libraries can only purchase one or two copies of well-used books. This means that thousands of students will use and no doubt,

damage these limited resources, since they are unable to purchase them for themselves. The copyright law prohibits a library from preserving the original by reproducing extracts or a section of a book for users to copy from (even if the material is for a short-term study assignment).

The spread of HIV/AIDS in sub-Saharan Africa has far exceeded the worst projections. It has retarded the transformation from illiteracy to literacy. The lack of access to information and education has been one of the major factors in the spread of this disease, and the pandemic itself has affected education in a very serious way. Making multiple copies of extracts or articles from copyrighted works is prohibited by copyright law. In such a catastrophic pandemic, surely the nursing sister needing to disseminate vital information to health-workers and other relevant groups, should be exempt from having to apply for copyright permission and pay licence fees? The urgency and need to distribute essential information for the public good *surely* outweighs commercial interests?

A rural teacher knows her class cannot afford the high fee to copy a few plays and they have no library, so she copies them anyway. She believes (rightly or wrongly) that cultural development in a developing country far outweighs the commercial interests of a multinational publisher that would not have had a sale anyway, because the price of the originals was excessive. (Forty-three percent of government schools in South Africa do not have electricity.¹¹ Only 19.8 percent have libraries or media centres.¹² The figure is far less in other African countries. The majority of schools, libraries and resource centres are poorly resourced. High book and journal prices, exchange rates and taxes make the acquisition of textbooks virtually impossible. Photostatted material provides an alternative for teachers and learners. However, copyright laws are very restrictive with regard to reproductions for teaching or library purposes.)

In rural areas, oral communication is the main source of information, but the print medium is essential for advancement to

literacy and education. A literacy facilitator therefore offers reading lessons to illiterate people in a shantytown. These people have no fixed addresses, so they cannot borrow from the downtown library. There is no electricity available, so they cannot make 'fair use' copies for themselves in terms of the copyright law. Copyright law prohibits her from making multiple copies for them at the downtown library. It also prevents her from making translations, adaptations or derivative works which would be appropriate for different age groups and different levels of literacy. These people can barely afford food and clothing, let alone pay for expensive books or copyright royalties. So what choice does she have? Make copies and modify works to educate, or perpetuate illiteracy?

Differences in copyright laws, copyright awareness and compliance also make cross-border exchange of information extremely difficult.

If a healthy bank balance, rather than balanced copyright legislation, is the only key to new and varied information, then how will African countries ever become developed?

Where is the Balance?

The world-renowned organization, the Royal Society for the Encouragement of Arts, Manufactures and Commerce (RSA) in its recently launched Adelphi Charter on Creativity, Innovation and Intellectual Property, sets out the need for balance in its fundamental principles for global attention, as follows:

- a) The purpose of intellectual property laws is to enhance creativity and innovation;
- b) All intellectual property rights must be measured against the public interest;
- c) The public interest requires a balance to be struck between the monopoly rights implicit in intellectual property laws and the free competition that is essential for economic and creative vitality.

The Society also calls upon governments to adopt the 'Adelphi Public Interest Test' as follows:

- a) There must a presumption against extending intellectual property;

- b) Change should be allowed only if it is shown to bring economic and social benefits;
- c) The burden of proof must lie with the advocates of change;
- d) Throughout there must be wide public consultation and a comprehensive, objective and transparent assessment of the costs and benefits."¹⁵

The WIPO Copyright Treaty also recognizes the need to "maintain a balance between the rights of authors and the larger public interest, particularly education, research and access to information."¹⁴

So where is the balance?

Information has value for rights-owners, but what about its value for the individual, for communities, society at large? There *is* no balance. Copyright has become a tollgate on the information super-highway. Developing countries *need* the information. Developed countries *control* the information. The knowledge and digital divides between the North and the South continue to widen.

IFLA states that "overprotection of copyright could threaten democratic traditions, and impact on social justice principles ... If copyright protection is too strong, competition and innovation is restricted, and creativity stifled."¹⁵ In fact, too many restrictions may just be encouraging non-compliance.

Benefit or Burden?

Is copyright a benefit or burden for African countries? Clearly, it is a burden for African countries. It is not working for Africans, but it is definitely working for developed countries. It has become a sophisticated income-protection mechanism for rights owners, particularly foreign corporations. Rights owners claim that copyright encourages creativity and provides an income for local authors. Yet, the main beneficiaries of copyright are foreign publishers, not authors nor Africans. In South Africa, apart from textbook authors who can earn up to 25 percent royalties on retail sales, authors can earn between 8 percent and 12 percent royalties, depending on various factors.¹⁶ However, in practice, most authors earn less than 9 percent royalties on sales and very little

on copyright reproduction fees. This is hardly an incentive to encourage creativity.

Scholarly authors generally have to assign their rights to journal publishers (mostly foreign) who claim their royalties. In fact, African educational institutions pay several times for the same material. They pay for the research to be done, they pay for articles to be published in some journals, and they then subscribe to the printed journal and/or electronic version, and then pay copyright royalties over and over again, to make copies of their research articles to teach their students. Also, the majority of works used in tertiary institutions are foreign, and the bulk of royalties collected for reproductions are paid to foreign publishers.

Films, music, CDs, DVDs and e-resources are controlled by restrictive licences, which mostly override copyright law. Copyright fees are included in expensive subscriptions for e-databases, which are payable mainly to foreign rights-owners.

Copyright has become an economic burden for educational institutions and libraries in Africa.

Infringement in educational institutions is not generally with criminal intent. Very often communities cannot afford to purchase books or pay for copyright royalties, but they need the information to become literate and educated. In most African countries, there are few, if any, copyright exceptions for education and often the only way these communities can access information to get educated is to disregard the copyright laws. The stricter the laws, the more infringements there tend to be!

How is copyright benefiting local publishers and authors, if there is such a large outflow of currency to foreign publishers each year? How is copyright benefiting education, if information is over-protected, only accessible to the elite, or locked up altogether?

If copyright were serving its true purpose, then why is it so highly contested by civil society in developed countries and even challenged in constitutional courts?¹⁷ There are many examples in the United States, the European Union and Australia, as well as ongoing debates on treaties in WIPO, for example, on broadcasting, patents and database protection.¹⁸ It is not surprising then, if copyright is not working so well in the developing world.

International Pressures

Despite the burden of inappropriate and restrictive domestic copyright laws, African and other developing countries have to adhere to very strict copyright rules and regulations through international agreements, which developed countries, like the United States, Britain and Japan did not have to, when they were in the developing stages. In fact, these countries actively used subsidies and protective tariffs to protect their infant industries, at the expense of other countries.¹⁹ This situation is analogous to developed countries 'kicking away the ladder' from developing countries, which they themselves used to climb to the top.²⁰

Developing countries are net importers of intellectual property. South Africa's research output, for example, is only 0.5 percent of global research.²¹ It is less in other African countries. These countries are dependent on advanced countries for the bulk of their research and educational material.

Many of them were pressured into signing international intellectual property agreements even before some developed countries signed them. The US refused to sign the Berne Convention when it was growing its publishing industry. It in fact benefited greatly from other countries in the process. Only in March 1989, when it became a net exporter of intellectual property and began to derive huge economic benefits from it, did it become a signatory to the Berne Convention. Now it dictates how the rest of the world should protect and manage intellectual property.

In addition to current copyright barriers and serious problems in accessing information and exchanging knowledge, African countries are struggling to meet the very basic requirements of the WTO Agreement on Trade-Related Aspects of Intellectual Property Rights, known as the TRIPS Agreement.

The TRIPS Agreement is one of the most significant achievements of the Uruguay Round of the General Agreement on Tariffs and Trade (GATT). Signed by 124 nations, together with other multilateral trade agreements and the Agreement Establishing the World Trade Organization, TRIPS is the first comprehensive intellectual property agreement ever executed by most of the world's trading

nations. This is an international treaty which prescribes minimum standards for most forms of intellectual property regulation, including copyright, within all member countries of the World Trade Organization.²² It also encompasses the clauses of the Berne Convention. TRIPS is legally enforceable and subject to the WTO dispute settlement system. Non-compliance can result in serious trade sanctions. The adopted standards mirror those in force in the industrialized countries. Developing countries therefore have to assume the heavy burden of introducing substantial intellectual property rights reforms.²³ The cost of implementing TRIPS is beyond most of these countries' economic means. They are constantly monitored by industrialized countries and blacklisting is always a threat. In fact, "in the six years since it came into force, there have been ever-increasing levels of concern and evidence of social, environmental and economic problems caused by the implementation of TRIPS. Little, if any, of TRIPS promised benefits of technology transfer, innovation and increased foreign direct investment have materialised."²⁴

If that is not enough, some African countries are now being pressured to sign the General Agreement on Trade in Services (GATS),²⁵ as well as Free Trade Agreements with industrialized countries, e.g. the United States, the European Union and others. The United States and the European Union's Free Trade Agreements contain an Intellectual Property Chapter, hereinafter referred to as TRIPS-Plus. "The TRIPS-Plus concept covers both those activities aimed at increasing the level of protection for right holders beyond that which is given in the TRIPS Agreement, and those measures aimed at reducing the scope or effectiveness of limitations on rights and exceptions."²⁶ These Free Trade Agreements also force countries to ratify or accede to several other intellectual property related agreements, even if they have not reached the developmental stages to cope with these additional responsibilities and financial burdens.²⁷

By now, all developing countries should have TRIPS-compliant intellectual property laws. However, many have experienced difficulty in achieving compliance. Least-developed countries have until 2013 to provide protection for trademarks, copyright, patents and other intellectual property under the World Trade Organization's agreement. However, they will not have to protect patents for pharmaceutical

products until 2016.²⁸ By adopting TRIPS-Plus, this whole process would be fast-tracked, causing even more socio-economic problems for these countries.

In recent years, Morocco,²⁹ Jordan,³⁰ Bahrain,³¹ Chile,³² Singapore,³³ and some Central American states,³⁴ as well as Australia,³⁵ have succumbed to this pressure and have adopted the TRIPS-Plus provisions in the Free Trade Agreement with the United States. They have all landed up with much stricter copyright laws.

For some time, the Southern African Customs Union (SACU) (consisting of South Africa, Namibia, Swaziland, Botswana and Lesotho) has been engaging in Free Trade Agreement negotiations with the United States, the European Union and other developed countries. SACU countries are also engaging in multilateral agreements, as well as bilateral agreements with other developing countries, including the Latin American trade bloc Mercosur, India and China.

The Agreement that was of most concern to SACU countries for a number of years was the US Free Trade Agreement. The United States were pressing for negotiations to be finalized by the end of 2006. The outcome of these negotiations is discussed later on in this paper.

African Growth Opportunity Act (AGOA) – Stepping Stone to a Free Trade Agreement?

Do the countries in the Southern African Customs Union (SACU) or any other African countries need a Free Trade Agreement with the United States? This is debatable, since many of them already enjoy duty-free markets for 95 percent of their exports through the African Growth Opportunity Act (AGOA), which is a unilateral piece of legislation passed by the United States Congress in 2000.³⁶ To date, the United States has designated 37 countries for duty-free tariff treatment for certain products. These countries must have established, or be making progress towards, a TRIPS-compliant intellectual property regime. If these requirements are not met, they could be blacklisted or expelled from AGOA.³⁷

AGOA is subject to annual review by the United States. Although the programme has been

extended until 2015, the United States could withdraw from it at any stage. Sub-Saharan Africa (a region of 48 countries with more than 643 million people) has long been a marginal player in global trade. It accounts for less than 2 percent of US merchandise imports. For those countries that have been participating in AGOA, there have been reasonable trade benefits. However, the main beneficiaries of AGOA are United States' companies, which are guaranteed preferential access in the region.

Lack of permanence and constant monitoring of participating countries, however, perpetuates dependence on the United States. AGOA is an obvious stepping-stone to a Free Trade Agreement, which would bind countries to a more permanent partnership with the United States. Countries could lock in AGOA benefits, boost confidence and attract foreign investment. However, unless a Free Trade Agreement accords developing countries the right space to respond, first and foremost, to their fundamental developmental needs, this step should not be taken, since poverty and inequality would just be intensified.³⁸

What is a Free Trade Agreement?

By definition, a Free Trade Agreement is a contractual arrangement which establishes unimpeded exchange and flow of goods and services between trading partners regardless of national borders.³⁹ As previously mentioned, the United States and European Union Agreements contain a TRIPS-Plus Chapter, which far exceeds all current international obligations for all types of intellectual property. It promotes the controversial United States Digital Millennium Copyright Act, the Sonny Bono Copyright Extension Act and aspects of the European Union Copyright Directive.

Developed countries promote TRIPS-Plus as being beneficial to developing countries. Yet, it extends the term of copyright, patent, and trademark protections, and expands the scope on what can be protected by intellectual property rights. It also eliminates traditional limitations and exceptions, which are especially intended to promote the public interest.

Multilateral trade negotiations through the World Trade Organization have become more complex,

since developing countries have far different interests from those of the industrialized countries. Each round takes much longer to negotiate. By pursuing free trade agreements outside this forum, developed countries can aggressively drive their global trade policies. The assumption is that what they do not get in multilaterals, they will get in bilaterals.

Harmonization vs. Competition

Developed countries promote TRIPS-Plus as a necessary mechanism for global intellectual property harmonization. However, harmonization to date has been very limited. The United States and the European Union may have the same copyright term but their copyright laws are far from harmonized. Just one example, the European Union has strong protection of authors' moral rights, whilst the United States does not. In the Australian/US Free Trade Agreement there has not been harmonization either, for example, the periods covered by copyright extension, fair dealing vs. fair use, standard of originality and moral rights issues.⁴⁰

The US Free Trade Agreements are far from free or fair. Countries that have already signed these Agreements have had to forfeit a great deal to gain access to global markets. They have had to adopt much stricter copyright regimes, with a 20-year extended copyright term. As a result, Morocco's copyright regime is anomalous with most other African countries. This has an impact on education, libraries and cross-border exchange of information. How can this agreement be *fair*, if developed countries are the main beneficiaries? How can it be *free*, if it will drastically increase the outflow of currency to developed countries? Are Free Trade Agreements between developed and developing countries true agents of harmonization? No, they are definitely not. In fact, they are used as competition tools amongst rich countries and as bargaining tools against poor countries.

Agricultural and other trade benefits come with a high price tag for developing countries desperate to enter global markets. They become pawns in the 'carrot and stick' games played by rich countries. Such unequal bargaining power can result in significant restrictions remaining in place, e.g. the European Union's controversial

agricultural policy and the United States' anti-dumping policy. Rich countries promote free trade, yet demand higher levels of IP protection, whilst jealously protecting their own agricultural markets, where developing countries clearly have a comparative advantage.⁴¹ This so-called 'global harmonization' can best be described as 'Americanization', 'Europeanization' or a form of 'Knowledge Colonialism or Imperialism'.

Even though TRIPS-Plus provisions are strongly criticized by their own citizens, especially in the United States, developed countries entrench their TRIPS-Plus regimes through bilateral Trade Agreements with other countries. If developing countries negotiate disproportionate concessions in bilateral Agreements, it may be difficult to rectify the situation multilaterally in the WTO talks. They will no longer have anything of substantial interest to trade away, in exchange for the removal of remaining significant barriers by developed countries.⁴²

If negotiations were instead to remain in the WTO with no bilateral free-trade agreements, the smaller countries could at least band together to increase their bargaining power. The result would be a more equal, and quite likely, closer to total elimination of trade barriers, which would benefit all countries.⁴³ Unfortunately, rich, powerful countries drive the process.

What is of concern is that "Free Trade Agreements might divert the world away from multilateral trade liberalization and lead to the development of large, competing trading blocs such as the United States and the Western Hemisphere; the European Union and nearby countries; and Japan and its trading partners in Asia and the Pacific Rim, a result that would be inferior to multilateral free trade", and detrimental to developing countries.⁴⁴

Unfortunately, governments negotiate Free Trade Agreements behind closed doors, with little, if any input, from other stakeholders. The contents are confidential and therefore not in the public domain. It is believed that the Free Trade Agreement offered to the Southern African Customs Union (SACU) by the United States was similar to the Australian/United States Free Trade Agreement, which was signed during 2004. This latter Agreement has been strongly criticized by educators and librarians in Australia, a developed

country, but a net importer of intellectual property.⁴⁵

Would a similar agreement be fair for developing and least-developed countries in Africa? How could African researchers, teachers and librarians accept an Agreement, which would clearly exacerbate the problems of accessing information, and exchanging knowledge on the African continent? The United States is a major global exporter, whilst Africa as a whole, accounts for less than 2 percent of global trade.⁴⁶ How could this possibly be an equal partnership?

In South Africa, various consumer groups and the educational sector made submissions to the South African Government, objecting to the inclusion of TRIPS-Plus and other controversial clauses in any Free Trade Agreements.

The outcome of the SACU countries' Free Trade Agreement negotiations with the European Free Trade Association (EFTA), consisting of Iceland, Norway, Switzerland and Lichtenstein, was the successful exclusion of the chapters on intellectual property, investment and competition from the Agreement.⁴⁷

Discussions with the European Union on free trade issues have stalled for the moment.

With regard to the SACU/US Free Trade Agreement, it was a requirement of US law that its country's trade negotiators bring back US standards of intellectual property protection through a signed Free Trade Agreement with the SACU countries.⁴⁸ During 2006, however, the SACU countries decided not to enter into a Free Trade Agreement with the United States, because of insurmountable differences between the negotiating parties on various issues relating to the Agreement. This is seen as a positive step for the region.

South Africa's chief trade negotiator, Mr. Xavier Carim, had said informally that the US Free Trade Agreement took SACU countries "into territory where they were not prepared to go. He said SACU countries would not agree to anything that impinged on their development policies".⁴⁹

It is believed that the United States will now pursue Free Trade Agreements with other African countries.

Impact of TRIPS-Plus on African Countries

Free Trade Agreements with developed countries cover a wide range of issues, many controversial, which go far beyond the ambit of this paper. I will therefore focus on a few aspects of the TRIPS-Plus Chapter in the US Free Trade Agreement, which has serious implications for education and libraries, as well as for people with visual and auditory disabilities, in Africa.

TRIPS-Plus provisions impose a 20-year extension of the copyright term, far exceeding the minimum standards in international agreements, which most African countries have adopted. It clearly distorts the traditional balance of interests between copyright owners and users, fundamental to the concept of intellectual property. Education, research, access to knowledge and development policies would be seriously affected.

Large foreign corporations would have control over knowledge and cultural heritage for a further two decades. Consumers would have less material to use, and twenty more years' royalties to pay, mainly in foreign currency. The outflow of money would be detrimental to the economies of these countries, all net importers of intellectual property. The increased costs would place a huge financial burden on already under-resourced educational institutions.

Public access to books, films and music would be limited for a far longer period. Works that should already be in the public domain would come under protection for that extended period. The burden of copyright regulation would therefore extend to works, whether or not authors wanted them further protected, or commercially exploited. Since only about 4 percent of copyrighted works, more than twenty years old, are commercially available, this would lock up 96 percent of 20th century culture to benefit 4 percent.⁵⁰ This would clearly shrink the public domain.

Creative authors would have far less works to use as building blocks in making new creations. The creation of new works is dependent on a rich and vibrant public domain. Problems in accessing and exchanging information, particularly for educational purposes, would be exacerbated. TRIPS-Plus makes no distinction between research, education and entertainment, so dead

authors, film makers and songwriters would all be given an extra twenty years of control over their works – indeed from the grave.⁵¹

Copyright law is a barrier to digitization projects in educational institutions, libraries (including legal deposit libraries) and archives, as adaptations and conversion to a new format require copyright clearance for every item. Copyright clearance is time-consuming and tedious, especially when rights-owners are difficult to trace. If permission is denied, there would be gaps in collections and access to these valuable works would not be possible. An extended copyright term would therefore have additional administrative and major financial implications for these institutions.

Only 7 percent of South Africans have access to the Internet.⁵² Only 12.3 percent of government schools have computers for learning purposes.⁵³ These figures are much lower in other African countries. TRIPS-Plus provisions would therefore impact significantly on the small percentage of Africans who have access to electronic media. The availability of online material would be significantly reduced or blocked under TRIPS-Plus.

In the case of computer software, even more so than literature, music, films and television, the length of time for which copyright would subsist under TRIPS-Plus, would absurdly exceed the period for which it would be commercially useful.⁵⁴

To date, cross-border agreements have had to be negotiated to facilitate educational projects in Africa, because of different copyright laws and jurisdictions. Shrinking the public domain and extending the copyright term will only create more hurdles for those trying hard to educate African people.

Anti-Circumvention Technologies

The TRIPS-Plus provisions in the US Free Trade Agreement propose anti-circumvention measures that exceed countries' obligations under the World Intellectual Property Organization (WIPO). Ironically, these measures were strongly objected to when they were included in the US Digital Millennium Copyright Act and they remain a controversial issue in the United States.⁵⁵ Yet, they are included in the US Free Trade Agreement. These

protection measures ban acts of circumvention and the distribution of tools and technologies used for circumvention. Rights owners have the power to unilaterally eliminate fair use rights, stifle research and block text-to-speech software for blind people. They can institute differential pricing using technological control measures, such as lockup or protection codes on electronic books and CDs, and content-scrambling or regional coding systems on DVDS. These controversial laws can also create monopolies over devices and equipment that handle digital media.⁵⁶ Technological restrictions are employed on a growing number of consumer products such as DVDs, printer toner cartridges, and garage door openers, etc., that prevent competitors from building interoperable components.⁵⁷ They have the potential to lock up information long after the copyright term has expired. They also have the potential to lock up indigenous knowledge behind electronic databases controlled by multinational corporations operating content industries in developing countries. They are also an impediment to the development of software industries and open access projects in developing countries. They are also capable of creating barriers for ICT solutions in developing countries. The technological restrictions protected by anti-circumvention laws erode and infringe the public's rights.⁵⁸

TRIPS-Plus also strongly regulates Internet Service Providers, even for legitimate purposes. This could place unreasonable responsibilities on educational institutions and libraries in the management of their servers. In some instances, this could impact on freedom of expression, especially where larger corporations unilaterally decide what should be removed from servers. Smaller entities could be open to abuse, harassment or closure by powerful corporations.⁵⁹ In this way, large corporations maintain their control over information.

Developing countries must therefore resist anti-circumvention laws, since they have a serious impact on civil liberties, innovation, scientific research and competition. They restrict or even block legitimate fair use and copyright exceptions, allowed in domestic copyright law.

TRIPS-Plus and Public Health

The Doha Declaration on the TRIPS Agreement and Public Health at the World Trade Organization⁶⁰

recognized that the TRIPS Agreement, as an international instrument for the protection of intellectual property, should operate in a manner that is supportive of and does not run counter to the public health objectives of all countries.⁶¹ The UK Commission on Intellectual Property Rights⁶² explicitly affirmed the DOHA Declaration.⁶³ It encouraged developing countries to use compulsory licensing and generic competition, to increase access to essential medicines.

Apart from affecting access to information, including health information, TRIPS-Plus also erodes the DOHA Declaration by eroding TRIPS' legal exceptions. It limits the ability of weaker bilateral or regional partners to promote technological innovation, facilitate the transfer and dissemination of technology, take necessary measures to protect public health and take appropriate measures to prevent the abuse of intellectual property rights by patent holders.⁶⁴ It restricts generic drug competition and the export of generic drugs to other countries. Sub-Saharan Africa has more than 70 percent of all cases of HIV/AIDS in the world.⁶⁵ If TRIPS-Plus were adopted, public health in this region would be seriously compromised, putting millions of lives at risk.

TRIPS-Plus expands patent protection, which is a perfect way for international corporations to increase monopoly protection, especially in the pharmaceutical field. It also restricts exclusion of inventions from patentability, for example, software, business methods and life forms. This would counter any exclusion clauses in the patent laws of South Africa and other African countries.

By advocating TRIPS Plus, the United States is betraying its public commitment and the international consensus reached at Doha to assist developing countries fulfil their obligation to protect public health. It is arbitrarily interfering with developing countries' good faith efforts to improve and lengthen the lives of their citizens. It should in reality be promoting flexibility in determining appropriate levels of national patent protection, rather than making access to United States markets conditional upon adoption of TRIPS-Plus.⁶⁶

African countries need to prioritize public health and development policies over private commercial interests. They must resuscitate and implement

the DOHA Declaration and TRIPS flexibilities as soon as possible.

Should Africa Adopt TRIPS-Plus?

TRIPS-Plus is all about protection and extension of monopolies and anti-competition. It therefore has an anomalous position in the Free Trade Agreement. Adopting any of the TRIPS-Plus provisions in Africa, would substantially limit traditional private copying rights, fair use privileges, legitimate library and archival functions and scientific research. It would seriously compromise public health and impact negatively on their economies and development policies. It would intensify poverty and inequality.

How would developing countries benefit from laws that overly-protect foreign knowledge product and hinder growth of fragile domestic knowledge industries?⁶⁷ How can they possibly benefit if the concentration of wealth in the North is increased, at their expense?

TRIPS-Plus provisions also have serious implications for innovation, privacy and competition. They would also dramatically expand the scope of copyright to permit copyrighting of facts and data, which would clearly restrict access to information in the public domain. A vast universe of technical and scientific data, as well as large classes of facts, such as compilations, would be roped off from the public. This would be most damaging to education and libraries.⁶⁸

TRIPS-Plus provisions undermine democracy and national sovereignty and contradict the clear will of the public.⁶⁹ By including this Chapter in any Free Trade Agreement, all chances of developing countries adopting the flexibilities in international agreements would be permanently overridden. The door to better access to global knowledge would effectively be 'slammed in their faces'.

Intellectual property protection cannot be seen as an end in itself. Harmonization of intellectual property laws, whether through multilateral or bilateral agreements, cannot lead to higher protection standards in all countries, irrespective of their levels of development.⁷⁰

It would therefore be more appropriate for African countries to reject the TRIPS-Plus Chapter and to continue supporting the WIPO Development

Agenda,⁷¹ proposed by Argentina and Brazil on behalf of fourteen developing countries, which include the Africa Group. They should also support the Access to Knowledge Treaty (A2K),⁷² which consumer groups, civil societies, IFLA and libraries around the world are calling for through WIPO.

Copyright Cooperation in Africa

As rights-owners tighten their control over information, African librarians and educators have to take up the challenge to protect access to information and promote exchange of knowledge. To address this, some form of copyright cooperation is necessary on the continent.

In 2004, the Southern African Development Community (SADC),⁷³ and the Standing Conference for Central, Eastern and Southern African Library Associations (SCECSAL) in Uganda, supported a recommendation to establish an African Copyright Forum, to address copyright issues and cooperation in Africa.

An international conference was held in Kampala, Uganda, from 28–30 November 2005, with more than 130 delegates attending from 23 countries. The conference was co-sponsored by the Commonwealth of Learning and IFLA, via the National Library of Uganda and the Ugandan Library Association. The conference finale was the establishment of the 'Africa Copyright and Access to Information Alliance', which has subsequently been renamed 'African Access to Knowledge Alliance' (AAKA).

A number of international funding organizations have expressed interest in assisting this new Alliance (AAKA). Once formally registered, AAKA will work closely with the Electronic Information for Libraries Network (eIFL.net) and the Canadian-based Commonwealth of Learning. An academic from Wisconsin-Milwaukee University has offered to assist AAKA with research and legal assistance on a 'pro bono' basis. AAKA will provide advice and assistance to African countries when reviewing their copyright laws and will strongly promote the adoption of legal limitations and exceptions into their domestic laws. It will also encourage educational and library sectors to be involved in the legislative process when their countries review their copyright law. To date, these important stakeholders have not been

included in the legislative process. As a result, rights-owners have pressed for the strictest laws, without addressing the needs of education or libraries, e.g. in Ghana, Cote d'Ivoire, Botswana and Mozambique. Swaziland recently indicated that it would now include librarians and educators in discussions before it finalized its Draft Copyright Bill. Since the conference in Kampala, discussions have taken place between AAKA and the Ugandan Law Commission regarding its new Copyright Act, which unfortunately does not address the needs of education, libraries and persons with disabilities. In time, AAKA will also participate in regional and international fora, such as the World Intellectual Property Organization and the World Trade Organization, to present and debate copyright issues on behalf of its member countries.

Challenges and Recommendations

To address the *very real* problems of access to knowledge in Africa, I earnestly recommend the following:

1. The TRIPS-Plus proposals are *not* the answer for African countries. As developed countries were given unrestricted time and space to reach their current levels of development, so developing countries today should be allowed to enjoy similar privileges. African countries must strongly resist pressure to adopt TRIPS-Plus or other proposals that strike at the very heart of their economic and development policies. They must not be coerced into the economically skewed trade liberalization programmes of rich countries.
2. International and national intellectual property laws need to be reviewed, liberalized and harmonized, to facilitate, *not restrict*, access to knowledge; to encourage innovation and scientific research; to protect indigenous knowledge; to accelerate development; and to enable cross-border exchange of information. In this way, the balance between the *just* demands of rights-owners *and* consumers would be restored.
3. Legal flexibilities in international agreements, including provisions for education, libraries and people with visual, auditory and other perceptual disabilities, must be incorporated into national laws as soon as possible.
4. To address 'orphan works', where rights-owners are untraceable, African countries

should consider legislation similar to that being proposed in the United States.

5. Public-funded research should be made more accessible through open access initiatives.
6. Alliances should be established with international organizations, addressing issues affecting access to knowledge in developing countries.
7. African countries need to work together to find an appropriate copyright solution that works for Africa.

In conclusion, I urge readers of this paper, to challenge developed countries on this issue and to challenge their own Governments to do the right thing. They should encourage them to rather give full support to the Development Agenda for WIPO, the Access to Knowledge Treaty (A2K) and other pro-active initiatives to help their countries fast-track their status from 'developing' to 'developed', so that they will *all* be able to participate as *equal* partners on the global stage.

What a better world that would be for all of us.

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Women and Conflict in the New Information Age

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Abstract

Peace is more than the absence of war, violence or conflict. Between 1960 and 1980 Africa fought 32 wars, which led to the loss of millions of lives whilst over a million people became refugees. These conflicts, which still continue, along with poverty and diseases, have all threatened the stability of the continent. There are many concepts in peace building, among which a major one is creating clearer channels to disseminate information between the common people and policy makers; this is the role of librarians, especially women librarians. Women librarians' roles include: the provision and dissemination of useful and accurate information on peace and peace movements and women's groups; fighting for freedom of access to information; improving the reading habits of women and children; organizing exhibitions and talks on peace; ensuring life-long education for women and girls, etc. African governments have to ensure access to current information by African women through the provision of functional libraries and Internet facilities for them to be properly informed and participate in global discussion and for them to be empowered.

Keywords: Women; Librarians; Peace; Conflict; Information access; Africa.

Introduction

In contemporary times, inter-state and intra-state conflicts often result in wars or large-scale violence, involving massive destruction of lives and property as well as disruption of the social, political and economic lives of large populations. The 20th century was especially notable for the number of wars and other violent conflicts that took place, and the scale of destruction and disruptions that these produced. Apart from the First and Second World Wars in which millions died, the world also witnessed several other inter-state wars, mostly in the developing countries. In 1996, according to United Nations sources, about 50 countries were involved in major crises. However, while wars between states were few, wars and violence within states were many. The African continent, especially from the 1960s, has continued to witness countless intra-state wars and large-scale violence, from the wars of national liberation to wars of secession and civil wars, and sundry use of armed violence to settle internal political scores. Especially since the Cold War ended in the late 1980s, serial violent conflicts have plagued the African continent, from Liberia to Sierra Leone, Somalia, Sudan, the Democratic Republic of Congo, Guinea-Bissau and Côte d'Ivoire, to mention a few.

In the past four decades Nigeria has experienced dangerous scenes of incessant dysfunctional conflicts, which have occurred between communities, ethnic groups and religious groups. These conflicts are not confined to any specific geo-political region of the country. Recent examples include the seemingly unceasing riots in Zango Kataf, Tafawa Balewa, Mangus/Bokko, Ife-Modakeke, Igbo Ora, Tiv-Wukan, Warri, the Niger Delta, Abiabo and Oku Iboku and

Ugep and her neighbours. Other conflict areas include the religious conflicts in Kaduna, Kano, Sagamu and Aba. (Ubi, 2001). The oldest intra-ethnic conflict in Nigeria, however, is the Ife-Modakeke crisis. It has been going on for more than a century (Albert, 1999).

One distinguishing characteristic of post-Cold War intra-state conflicts is that they are more violent in the scale and intensity of the destructions and disruption that they cause. Additionally, they are known to specifically target unarmed and defenceless civilian populations. The most vulnerable groups in the population are usually women and children, and they have become the specific targets and victims of extreme brutality and sadism. The world witnessed the horrors of mass violence against women in Liberia, Sierra Leone and the Democratic Republic of Congo. Women and children were also victims of the ethnic cleansing in Rwanda in 1994. In these conflicts, women were convenient targets for attacks by the various rebel groups that claimed to be fighting the state. In the Liberian and Sierra Leonean conflicts especially, violence against women was used as a veritable instrument. Brutal rape, sexual violence, abduction of women and girls for sexual slavery, amputation of limbs, especially hands, were directed at women as instruments of the war. Massive and extraordinary brutalities are also known to be directed at women in the Democratic Republic of Congo, where even UN peacekeepers have been accused of rape and other forms of sexual violence against the women they are supposed to be protecting. Similar violence against women, including systematic rape, has also been reported in the Darfur crisis in the Sudan.

What has become the incontestable character of contemporary intra-state violence is that women are the victims, though not necessarily the targets, of conflicts. In every violent conflict situation, it is the women that have to bear the brunt. While able-bodied men go to fight, it is the women that are left behind, unprotected, and saddled with taking care of the aged and the children in the homestead. They are invariably vulnerable to violent attacks and raids, disease, epidemics, hunger and starvation, slow death, violent death, disruption of their lives and internal displacement. Women and children often constitute the largest number of people who are internally displaced in their own countries and refugees in neighbouring states. For example, most of those displaced from

the Darfur region and who are currently taking refuge in neighbouring Chad are women and children.

The time has come for women to be actively involved and integrated into conflict prevention, conflict management and peace-making efforts at national, regional and international levels. Nothing concrete and reasonable will be accomplished in peace-making as long as women are excluded from participation in decision-making processes about peace and good governance that can ensure lasting and durable peace. The role of great women in traditional African societies indicates that women have been critical to peace in their societies, but the modern state seems to have lost this context.

It is the submission of this paper that libraries, and especially women librarians, have a great role to play in promoting peace in the modern information age. They can bring their knowledge of the past and professional expertise to bear in this regard, through better management of information both during and after conflict situations.

Feminist Theories of Peace

The newest approach to peace building places much emphasis on gender in the process of conflict resolution (Mbagwu, 2001). The majority of persons displaced by war are women and it is now understood that they could play an important role in efforts to resolve conflicts. Sylvester (1994) described Athenian women as “beautiful souls” loving peace. This is in agreement with feminist theory, which argues that women are inherently peaceful, capable of preaching, teaching and preserving peace. Ferris (1992) reviews Birgit Brock-Utne’s study, which concludes that there is an innate ability in women that makes them prefer non-violent actions. Babbit and D’Estree (1996) observed that conflict resolution workshops with only women participants produced more constructive discussions than groups with mixed gender. Enahoro (2005) remarked that genius and creativity lie in the recesses of the mind of all womanhood. There is a notion that women are very trustworthy, dependable, and exhibit a high level of honesty and integrity. Women are dedicated, reliable and committed to family and national aspirations and goals. Women, the life givers of the world, therefore have a stake in the pursuit of peace since they exhibit a high level of

perseverance, patience and tolerance in achieving set objectives. Women have not walked away unconcerned because of either anger or fear; they have been proactive in the resolution of conflicts, but their roles have not before now been given the prominence and recognition they deserve.

In Mali, Liberia, Nigeria and indeed other parts of the world, women have demonstrated peacefully as mothers to condemn the killings of their husbands and children. But to the dismay of the peace process, women have not been included at all the levels of peace making. They are excluded and marginalized, their efforts are rendered invisible. Feminist theories believe that women should be involved in peace building at high decision making levels as they are more sympathetic to peace. Certainly women are generally more naturally disposed than men to caring for the underprivileged in the family and in society. The popular saying that 'when you train a man you have trained one person but when you train a woman you have trained a nation' comes to mind. A woman of peace will train her family and in turn we will have a peaceful nation. Conflict resolution programs must be developed to empower people to anticipate or stop conflicts themselves. Research into and historical analysis of African traditional societies have shown that if women do not have a voice or a say in matters involving peace, there will be no sustainable cross-gender resolution of the problem of war. Feminist theories have therefore defined more roles for women in Africa; but to perform these roles well, women require information.

Action Plan for Peace in Africa

African Nations and Feminism

There is no doubt that conflicts have stunted the development of Africa. Conflict resolution within the African continent cannot be left only in the hands of the international community. The problems need to be tackled from within by African initiatives such as the New Partnership for Africa's Development (NEPAD). Governments must recognize the roles of women and encourage them to participate actively in politics and peace movements. Nie and Verba (1972) define political participation as those legal activities by private citizens which are more or less directly aimed at influencing the selection of government personnel and the actions they take. Feminism has pioneered

a modern definition, which affects not only the actions and decisions of governments, state forces and elected representatives, but also political interactions in societies, communities and our homes. The old style of politics that is male dominated and excludes women's participation is giving way to a new one that gives equal opportunity to all.

Women are being mobilized indirectly in many African countries with the aim of promoting the peace process in conflicts. They have used different strategies in order to reinforce the abilities of existing structures to rehabilitate, reconstruct and reconcile and to protect refugees and displaced women. African women have used education and health programmes and taught peace through education, human rights and the knowledge of law. The women of the Darfur region of Western Sudan, for example, used songs of peace to build peace in their community according to Mohamed (2004). They also train their children to be peace lovers, building in them the culture of peace, while observing that Islam dictates that women ought to be peace builders. A women's group, the Women General Union (WGU) was quick in responding to any violent conflict that took place in Nyala, Sudan. An initiative of Liberian women in Lagos, Nigeria, is another example. They formed a group known as 'Liberian Women for Reconciliation and Peace'. They have the ambition of developing a lasting feminine peace culture (Oze, 1997).

While NGOs like these are now springing up throughout Africa, it is necessary for governments to evaluate the deeds of women's movements for peace in Africa in order to ensure that they form pressure groups to make themselves heard. Every culture has its own diplomacy. Every culture has mechanisms that keep people living side by side without violence. In the armed conflict areas, such as Burundi, Liberia, Rwanda, and Sierra Leone, Somalia and Sudan, women's movements for peace have made spirited efforts at reconciling warring factions. In Liberia, women had no chance to take part in negotiations and in meetings held by the different parties, but all the women's associations and groups were mobilized and succeeded in making declarations to the United Nations, the Organization of African Unity (OAU) and the Economic Community of West African States (ECOWAS) (Diop, 1997). Women have also organized peace marches and printed posters and brochures with slogans on disarmament and peace. The organization, Sudanese Women's Voice

for Peace, has organized meetings with the aim of restoring dialogue between Sudanese women of the North and South. All these efforts must be properly recognized by governments. South African women are also active in peace building, though their roles are not adequately recognized by the government (McKay and Rey, 2001). Even so, most African women are unaware of these activities as they lack access to information.

Role of the International Community and Non-Governmental Organizations

According to the UN, peace culture is defined as a set of values, attitudes, modes of behaviour and ways of life that reject violence and prevent conflicts by tackling their root causes to solve problems through dialogue and negotiation among individuals, groups and nations.

The road to peace should be out of the concerted effort and concern of all. Third parties serve as mediators with various strategies towards maintenance of peace. Since World War 1, statesmen have been engaged in initiating peace settlements and establishing an international system for the maintenance of peace and security. The outcomes of these endeavours were the establishment, first of the League of Nations and now the United Nations, whose aims and objectives are fully set out in the Preamble to its Charter, thus:

We the people of the United Nations, determined to save succeeding generations from the scourge of war, which twice in our lifetime has brought untold sorrow to mankind, and to reaffirm faith in fundamental human rights, in the dignity and worth of the human person, in the equal rights of men and women and of nations large and small, and to establish conditions under which justice and respect of the obligations arising from treaties and other sources of international law can be maintained, and to promote social progress and better standards of life in larger freedom, and for these ends to practice tolerance and live together in peace with one another as good neighbours, and to unite our strength to maintain international peace and security... (Onoja, 1996:1)

The General Assembly of the United Nations declared the year 1975 as International Women's Year with a three fold objective: equality,

development and peace. The conference on women in Beijing in 1995 was also a demonstration of mobilization for the struggle for equality, development and peace. The remarkable thing in Beijing was the handing over of the flame of peace, symbolizing the daily struggles of women in Africa to promote the settlement of conflicts, appeasement, peace building and sustainable existence. The UN declared the year 2000 as the International Year of the Culture of Peace, and the years 2001–2010 as the International Decade for a Culture of Peace and Non-violence for the Children of the World. Governments, local organizations and individuals all over the world are using these years to probe deeply into the nature and practice of a peace culture. The UN also declared 21 September annually as the International Day of Peace. In the words of Kofi Annan "The future of the world belongs to women" (Annan, 2000). For the first time in history, at the United Nations in Geneva, women gathered for 5 days in October 2002 to talk about new initiatives aimed at promoting world peace and eliminating the causes that led to conflict.

In spite of efforts by the UN, international conflicts have persisted and many remained unresolved, and a plethora of more complex conflicts keeps occurring globally. Article 52 of the United Nations Charter allows regional organizations to make arrangements for settlements of their disputes, and many regional and sub-regional bodies have not relented in their endeavours on peace-keeping and peace making. We have seen such efforts being demonstrated by the Organisation of African Unity (OAU) (now the African Union – AU), the Organisation of American States (OAS), the League of Arab States, the Economic Community of West African States (ECOWAS), and the European Union, among others. Individual member states have also made efforts to complement the global efforts towards peace making and peace building.

The United Nations Economic Commission for Africa (ECA), the African Union and feminist NGOs have all dedicated themselves to the promotion of the African woman and her participation in decision-making, among others for the establishment of peace, the resolution of conflicts and national reconciliation. This is what the international NGO, Synergy Africa, is involved in. Formed by Africans based in Geneva, this organization aims at reinforcing the abilities of NGOs and other African institutions

for the prevention, management and resolution of conflicts in Africa. It created 'Women – Africa – Solidarity' (WAS) for the strengthening of women's abilities through techniques of training and political negotiation. The African Strategic Peace and Research Group and others are also involved in peace movements. All these are noteworthy but they must ensure appropriate follow-up to ensure compliance, and make conscious efforts to make their activities available online. They have to support African countries as they continue to strive to develop Internet connectivity in the continent. The need for all these activities to reach the women, both educated and illiterate, cannot be over-emphasized. Also, these agents have to involve the local women in any area where they are working so as to carry them along.

The Role of Women Librarians and the Sustainability of Peace Efforts

If African women are to participate meaningfully in peace talks they must be well informed. If they are given the right information they have the potential to excel as peace makers. Presently, lack of information is a major concern; hence librarians have many roles to play as information providers and managers.

Living in an atmosphere of peace and goodwill and enlisted in the work of spreading enlightenment, librarians could be said to take peace for granted. Libraries are quiet places; since war and conflicts are associated with noise, libraries are adversely affected by them. Librarians are also interested in peace and should promote it as a matter of self-preservation. A lot of government money which could have been spent on library development goes on wars. Are librarians just to fold their hands and watch, or do they have roles to play in the world peace movement?

Traditionally, librarians do not want to be seen as being political and taking sides. Librarians by training are neutral, presenting materials on both sides of any issue. In conflict situations the main guiding principle for the purchase of library materials is that of interested neutrality. The library stands only to enlighten the community it serves by presenting them with the facts they need to be able to make good decisions that will foster peace. Libraries are avenues through which

information on all aspects of life is disseminated to people.

In war situations in enlightened societies, the use of libraries increases as users flock to libraries to find information to guide them. Information that can promote peace, unity, progress, peaceful co-existence and harmonious relationship among all communities must therefore be available in libraries. In promoting access to such information librarians act as agents of the promotion of communal peace and reconciliation. In addition to reports from daily news and newspapers, users want to read books, journal articles and surf the Internet. We must also realize that whenever there are wars and conflicts new information materials are created, and libraries have to strive to collect them and make such information available. In the age of the Internet, libraries could carry out relevant searches and compile and package the results and make them available to users. In doing this, neutrality must be ensured to give ample opportunity for users to forming independent judgments. If these tasks are well done, the library will in no small way be involved in contributing to world peace and helping to build the reading culture of users; knowledge debunks myths about other people and can humanize other cultures.

Women librarians should see war, not as a controversial question which we do not want to dabble into, but rather as a question of fundamental ethics. They are in the best position to know how to inform and sensitize other African women on matters that concern them; in other words they should know the information needs of the women in relation to the roles they are to play to ensure peace in their community, and be able to meet these needs.

One of the tools that would help women move up and be able to contribute to national peace is education. Therefore, the education of women should be invested in as a long-term conflict mechanism strategy. Education is a human right and an essential tool for achieving equality, development and peace. The introduction of the Universal Basic Education programme in many African countries is a laudable one as it aimed at increasing the number of literate female population in the future (Okiy, 2004; Dent and Yannota, 2005). As more women become educated, it is important that they should be given the opportunity to address and deal, not only with their own issues, but also with issues of state,

with issues of war and peace, with issues of their communities. Africa must realize that the world is at the stage of 'Peace, Gender and Development'. Women librarians in Africa should therefore ensure that school libraries are developed to cater for the needs of the girls in these schools. This will inculcate in them the habit of reading and seeking information. It will also act as a catalyst to ensure that the education obtained by these females is of high quality. Okiy (2004) posited that, in addition, more women professionals would be produced to participate in and have an impact on national development more than ever before.

Women librarians could inform local peace societies that they would welcome lectures and debates on peace questions in the lecture halls in their libraries. These lectures need not be directly under library auspices, but might be under the patronage of the peace societies. While public libraries in developed countries generally feature in social and civic centre movements which use their buildings for public lectures, meetings and debates, this is not so much so in Africa, though things seem to be changing now. For example in Ghana, literacy classes are beginning to be held in libraries (Adjah, 2005). This way, women are indirectly being drawn into the library and its resources, creating opportunities for popularizing knowledge of the peace movement and for library cooperation. Librarians need such partnerships; they have been too much on the lonely side. Research institutions, universities and NGOs on women's issues in Africa are generating a lot of information, but this is not being passed on to women at large. This poses a challenge to women librarians in Africa.

Information is a major tool that can redeem African women (Acayo and Mnjama, 2004; Hameso, 1995). Librarians must realize this and make conscious efforts to meet the special information needs of women. Both educated and illiterate women in Africa suffer from lack of access to information. African librarians need to research the information needs of women and make conscious efforts to provide for them, whether governments like it or not. It is a task that must be done. African women need information that will help to eradicate the belief that they are non-political citizens whose place is in the kitchen. They must be well informed so that they can participate in decision making on issues that concern their communities. Libraries can plan programmes of enlightenment on the effects

of war and the benefits of peace, and the roles women are expected to play. The information needs of women during times of conflict must also be met because they are usually less informed at such times. The truth must be presented as it is. Librarians must take time to harness all sources of information and be well informed about the role of women both in their local environment and internationally.

Women librarians could partner with NGOs and international bodies like the United Nations to organize workshops to train women in political skills at the national and local levels. At the local level, presentations should be made in local languages. These workshops could be planned to mark important dates like International Women's Day, World Peace Day or World Literacy Day, to create awareness. They should be publicized both through the local radio and in social gatherings. Rallies and book talks, which would help to improve the literacy level of women, can also be organized by the library (Okiy, 2005). Bibliographic sources of information on women should be acquired and made available. Librarians should produce bibliographies on women's studies to improve access to traditional and non-traditional sources.

The establishment of women's information centres is to be encouraged. A good example is the Women's Research and Documentation Centre (WORDOC), which was established by a group of women in 1987 in the Institute of African Studies at the University of Ibadan, Nigeria, as an organic offspring of the activism of women's organizations during the colonial period for independence and for women's participation in national life. The centre made pioneering efforts at the systematic collection of materials on women's studies. WORDOC is a special library set up to cater for the information and research needs of scholars in the study of gender issues. It disseminates information by preparing accessions lists, compiling bibliographies, displaying current periodicals, Selective Dissemination of Information (SDI) and the like. It also organizes public lectures for women, sometimes in local languages to reach the grassroots women (Fijabi and Opeke, 2001). Information is transmitted through a variety of channels such as newspapers, mail, magazines, pamphlets, books, electronic and telecommunication media. Sharma (2001) and Mchombu (1999) discussed African libraries

in relation to the information needs of African women. They also called for more information centres. While educated women need access to modern libraries with Internet services, rural women need information repackaged and delivered to them. African librarians need to advocate for more community and modern libraries. According to Dent and Yannota (2005), more community libraries, such as the Osu initiative libraries in Ghana and the Kitengesa Community Library in Uganda are now springing up. These initiatives are not funded by the government, but by NGOs and international bodies like UNESCO. The roles played by the librarians in these special libraries include literacy services. When African women are informed they will be able to fight for their rights and participate in politics, decision-making and conflict resolution, using their God-given abilities as peace loving people.

Information and communication technologies (ICTs) constitute a powerful learning tool. They offer a direct and inexpensive means of communication for women's organizations, enabling them to share knowledge on a quick and collective basis, and have great potential to benefit women worldwide. Global access to information continues to increase and expand, creating new opportunities and challenges for the participation of women in mainstream activities for women's equality and for the dissemination of information about women's issues in developed and developing countries. The 4th World Conference on Women in Beijing in 1995 stressed the importance of these new technologies to promote greater communication by women. However, access to these new technologies is restricted, and ensuring that the policies that guide their use are gender-responsive remains a challenge. Low levels of literacy, limited technological access and know-how and the often inadequate infrastructure and high cost of connectivity in developing nations prevent many women in Africa from taking full advantage of the opportunities offered by ICTs, even though they are interested in the new technology. Connectivity to remote areas for women to use has the potential for empowering them. Educated women can only get access in libraries and offices that are connected to Internet, as most homes cannot afford connectivity. Though cyber cafés provide avenues for surfing the Internet, many women do not find them convenient to use, since it entails leaving the home.

Women form half of Africa's population, so they must have opportunities to access, use and master ICTs. Librarians in Africa must themselves receive training in ICTs and then train other women to use the medium to be enlightened and well informed. The case now is that many women librarians themselves are not ICT literate because most library managements in Africa do not favour women when selecting staff members to be trained in ICTs. The world is considered now as a global village. In Africa, the village is a community closely knit together in virtually every ramification – socially, emotionally, economically, morally, etc. In the village, everyone knows when a stranger comes in, news spreads fast. Librarians should make sure that women are exposed to the latest news. As information gateways librarians must bring information from all over the world to African women through ICTs.-

There are many organizations involved in world peace; the librarian can promote their work. Information is important for world peace. It creates sensitivity and awareness. Information that can promote peace, unity and progress – peaceful co-existence and harmonious relationship among all communities – must be made available. While African librarians download information for women in the developing countries from developed countries they must also find a way of putting on the Internet results from local researchers for the developed world to access. The problem of creating locally relevant content on the Internet needs to be addressed urgently.

Libraries also have a central role in society as cultural and educational institutions, and as agents for promoting literacy. IFLA considers books and libraries, as well as the promotion of the reading habit, essential for better international understanding and as such they are a fundamental precondition for peace, human rights, literacy, intellectual freedom and a better environment for people. The challenge therefore for women librarians in Africa is to ensure good collections of materials in their libraries.

Women librarians in Africa should vie for political positions. If they are elected, they can lend their voice to fight for the common good of women and the development of libraries. They could also form an NGO for peace, made up of women librarians. The aim would be to make their impact felt by sourcing for money to start libraries that will cater for women.

Conclusion

To have peace in Africa it is mandatory for all concerned – women, men and children – to be well informed (Abdulrahman, 2001). This paper has advocated that African governments have to ensure access to current information by African women through the provision of functional libraries and Internet facilities for them to be properly informed and participate in global discussion and for them to be empowered. Issues of sexual stereotypes and the cost of Internet connectivity need to be addressed. Peace dividends must include good life for the rural people. That is, improved wellbeing and fulfilled livelihood for women, men and children.

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The Role of a National Library in Supporting Research Information Infrastructure

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Abstract

The National Library of Australia is collaborating in a national program to improve the nation's research information infrastructure. These activities have provided a focus for the Library in its engagement with the university community. The Library has developed integrated discovery services, actively participated in three research information infrastructure projects, and worked with partners on the problem of sustaining university repositories to support long-term access. The Library is an active partner in Project ARROW (Australian Research Repositories Online to the World), which is developing a solution for institutional repositories in collaboration with a commercial vendor, and also in the Australian Partnership for Sustainable Repositories (APSR), where the Library is helping to develop a sound approach to assessing the obsolescence risk of file formats, advising on a strategy for including preservation metadata in the repositories, and seeking to influence the future development of open source repository software to make use of preservation metadata.

Keywords: Research infrastructure; Cyberinfrastructure; National libraries; Resource discovery; Data curation; Institutional repositories

Introduction

This paper is based on the experience of the National Library of Australia during the past 3 years in working with universities and the federal Department of Education, Science and Training to improve research information infrastructure in Australia.

In Australia in 2001 the federal Department of Education, Science and Training launched the Systemic Infrastructure Initiative¹ as part of the Government's 'Backing Australia's Ability' Program. The Initiative was aimed at improving the effectiveness of Australian research by developing 'research infrastructure' services. Such services comprise categories such as:

- collaborative support services (services needed by distributed research teams such as peer-to-peer data sharing, simulation and visualization tools, and collaborative annotation tools)
- middleware services (such as federated authentication and authorization, and digital rights management) which will support more streamlined access to the resources that each researcher is entitled to use
- services which allow institutions to manage, make accessible and preserve the outputs of research, such as research papers and data sets.

This third category represents what is termed, in this paper, 'research information infrastructure'. A more formal definition is 'the set of services that support the discovery and management of research resources and research outputs by the current and future research community'. These services are often developed collaboratively and

are intended to benefit the whole information access system. Examples of research information infrastructure include:

- content, such as electronic texts, which support research in the humanities
- services used by researchers to discover resources to support their research
- institutional repositories which manage research outputs
- digital curation and similar services which ensure long term access to research outputs.

There are many providers of such services. In Australia, there is not yet a fully organized process for achieving inter-operability between such services, or for identifying and dealing with overlaps and gaps. However, there is a formal process to provide advice to the Department of Education, Science and Training on the future development of research information infrastructure. The Department has established an advisory committee (the Australian Research Information Infrastructure Committee) which includes representation from university libraries, academics, the Australian Research Council, and the National Library ².

Many services, publicly funded to support research, have the potential to deliver benefits to the general public. The Internet itself is the most prominent and obvious example of 'research infrastructure' which has evolved into public information infrastructure. The public, no less than the researcher, requires rapid and easy access to information resources that they are entitled to use. In other words, there is an overlap between 'research infrastructure' and 'national information infrastructure'. The National Library of Australia is interested in identifying and strengthening these synergies.

The National Library has a longstanding record of support for information infrastructure. Its enabling legislation gives the Library a mandate to build a national collection, to make it available in the national interest, to provide a record of Australian publishing and other bibliographic services, and to 'cooperate in library matters'. In acting on this mandate over the years, the Library has developed some key components of the national information infrastructure. These activities support underlying objectives such as:

- to provide online access to a greater range of content

- to provide easy-to-use services to discover and access information content, including the collections of Australian libraries
- to ensure that future users will be able to access online content
- to give people efficient access to the online resources that they are entitled to use.

Examples of the National Library's recent activities in pursuit of these objectives are set out below.

Developing Digital Content

The development of digital content by libraries and other services has a clear ability to support research of all kinds. It has a particular benefit in the humanities, as was explained in a recent submission to the Department of Education, Science and Training ³:

Humanities research data ... has to be collected, primarily from non-digital sources, and its collection has traditionally been a matter of individual labour, closely integrated with the processes of annotation and commentary that transform data into information. The labour-intensive processes by which humanities data is collected make it expensive to obtain. It is, however, highly reusable, and in digital form it can be preserved and benefit from a vastly increased capacity for circulation.

Humanities researchers obtain much of their research data from the collections of libraries, archives and museums. A growing proportion of these collections, including a range of historical and cultural records, are being digitized, but the pace of these activities has been constrained by resource limitations. It is possible to identify many additional projects which could dramatically expand the resources available to the humanities and social science researcher.

An example identified in Australia is the digitization of a collection of significant newspapers covering a period of 150 years from the early 19th century. Such a project, which would cost around AUD 3 million, would enable researchers to search across the full text of all digitized newspapers. Similar projects have been funded in the United Kingdom by the Joint Information Systems Committee (JISC) and in the United States by the National

Endowment for the Humanities. A national digital newspaper database could:

- support biographical and historical research, enabling researchers to locate relevant newspaper articles far more efficiently than at present, thus enabling them to focus more on unpublished information sources
- provide an invaluable resource for longitudinal cultural studies, including media studies
- support longitudinal research in certain scientific fields such as ecology and climate change.

In 2005 the National Library partnered with the Australian National University (ANU) and other universities to prepare a funding bid for such a project. The funding bid was not successful, but the Library remains convinced that such a service would be a valuable component of research information infrastructure. It is therefore continuing to explore mechanisms through which the project might be advanced.

An online searchable newspaper service provides a good example of infrastructure which could benefit both the research community and the general public, including historians, family historians and a wide range of other users.

Funding the development of digital research resources from a public source will overcome the access restrictions which occur when public domain works are digitized by the commercial sector. In the latter case, even though the works are in the public domain in their printed form, the licenses restrict use of the digitized versions to authorized, fee-paying users.

Discovery Services

Researchers and the general public need easy-to-use services to discover and access information content, including the collections of Australian libraries. In its *Directions Statement* for 2006 to 2008, the National Library defined one of its major undertakings as “to enhance learning and knowledge creation by further simplifying and integrating services that allow our users to find and get material”⁴.

There is a significant challenge in improving the power, ease of use, and level of integration of the available discovery and access services, mainly because the discovery landscape is currently quite

complex. Mechanisms for discovering information resources include:

- Google, including Google Scholar
- institutional and collaborative portals
- library catalogues and union catalogues
- specialized discovery services, including those which provide a central point of access to multiple institutional repositories
- indexes, databases and electronic journal aggregation services, subscribed to by university libraries, that support access to journal articles, conference papers, and similar resources
- subject gateways.

There is a need for collaborative action to simplify this complex discovery landscape and to ensure that the various services are interoperable. There is also an argument for subsidizing the costs of these services as part of the national research information infrastructure.

One approach to simplifying the discovery landscape is to enhance the role of union catalogues. By aggregating metadata, union catalogues are well placed to aggregate both supply and demand, thus increasing the chance that a relatively little-used resource will be discovered by somebody for whom it is relevant. In addition, union catalogues are well placed to seed metadata on behalf of libraries to public search engines such as Google, increasing the exposure of library collections to researchers and the public.

In recent years, a number of union catalogue services have moved to a more open business model. For example, OCLC’s ‘Open WorldCat’ program is making the data in the WorldCat database freely available to web users via popular Internet search, bibliographic and bookselling sites. With a similar motivation, the National Library of Australia introduced free access to the Australian union catalogue (known as *Libraries Australia*) early in 2006. In addition, the Library has seeded metadata from the union catalogue to Google, along similar lines to Open WorldCat. This will help bring the content of Australian library collections to the attention of users who might have overlooked some library catalogues as discovery pathways.

In addition to *Libraries Australia*, the National Library has developed a number of other freely accessible federated discovery services, namely

PictureAustralia, MusicAustralia, the Register of Australian Archives & Manuscripts, and the ARROW Discovery Service.

The ARROW Discovery Service⁵ provides federated search access to the content of Australia's university repositories. The service regularly harvests metadata from these repositories, using the OAI Protocol, and aggregates it into a database hosted by the National Library. A search will result in an integrated display presenting relevant items in various repositories, and a click on a selected result will take the user to the corresponding item in the local repository. To date, the service has harvested over 20,000 metadata records from thirteen institutional repositories, including repositories based on ePrints, DSpace, Fedora (Fez and VITAL applications) and ProQuest's Digital Commons. The aggregated metadata will be made available for other services (including international disciplinary based services) to harvest using the OAI Protocol.

Archiving and Curation

Our definition of research information infrastructure referred to 'the current and future research community'. It is important to ensure that future researchers are able to access the online resources which are being created and archived today.

The National Library is undertaking several activities to achieve this. For the past 10 years, in collaboration with the state libraries and other partners, it has developed PANDORA, an archive of selected Australian websites and online publications. During 2005, the Library undertook the complementary activity of commissioning and analysing a comprehensive capture of the Australian web domain. These web archives will provide a rich resource for future researchers to mine and analyse.

Ensuring future access to such content will require a range of concerted measures beyond merely archiving the content. These measures will depend in part on gaining a better understanding of the file formats which comprise the content, the obsolescence risks associated with each format, and the costs of dealing with obsolescence through format migration and other techniques. Among the content requiring sustainable access are the primary and secondary outputs of research.

The primary outputs include data sets, images, video files and sound recordings generated as the 'raw outputs' of research. The secondary outputs include books, pre-prints, journal articles, conference papers, theses, technical reports, unpublished papers and websites which interpret and summarize the research findings.

The secondary outputs have, of course, traditionally been preserved, in printed form, in our library collections. However the majority of these outputs are now available in electronic form through electronic journals, personal websites of academics, and institutional and departmental websites. This change has raised issues about how these documents should best be managed for long term access.

The primary outputs are typically managed by academics on faculty servers, or (in the case of some research disciplines) by national and international data centres. The long term preservation of this data is threatened by inadequate data management practices, by the steady emergence of new file formats and by the technological obsolescence which accompanies this process⁶.

Some of these primary outputs have long term value. These may include:

- quality research in the humanities
- social science research, including statistical data, where future time series analysis is likely to be beneficial
- epidemiology in medical research
- ecological studies of particular regions
- most geoscience and meteorological data.

In 2003, the United Kingdom's 'e-science curation report'⁷ noted that:

- researchers have low awareness of data longevity issues
- there are no procedures in place to encourage researchers to work in partnership with curators
- funding of data curation tends to be short term funding, which is antithetical to the long term nature and needs of data curation
- where retention of data is a requirement set by funding bodies, most researchers said that this requirement was not funded
- there was no government level strategy for data stewardship to which researchers and administrators can refer.

The position in other countries is likely to be similar.

Institutional Repositories

The development of institutional repositories has, at least in part, been a response to the need for improved infrastructure to support academics in managing their research outputs.

In Australia, a number of universities have been using the Southampton E-prints software for the last couple of years. Some others, most notably the Australian National University, are implementing DSpace as their repository solution.

The ARROW Project (Australian Research Repositories Online to the World), led by Monash University, was funded in 2003 by the Australian Department of Education, Science and Training. ARROW has supported the development and deployment of the VITAL software from VTLS Inc., which is based on the open source Fedora software ⁸.

As a partner in ARROW, the National Library of Australia has been trialling the VITAL software. Though the Library already has a digital services architecture which supports both the PANDORA Archive and the digital content which it creates through its digitization workflows, the Library does not currently have a satisfactory solution for a third ingestion method, in which digital content is submitted or deposited by publishers. Trialling the VITAL software will give the Library an opportunity to evaluate a potential solution for this ingestion method, and an opportunity to use this information in a reassessment of the medium term future of its digital collection architecture.

Another Australian institutional repository project is the Australian Partnership for Sustainable Repositories (APSR). This project, led by the Australian National University (ANU), aims to develop demonstrator repositories and support continuity and sustainability of digital collections, including research data sets.⁹ The demonstrator repositories are being developed at ANU, University of Sydney and University of Queensland.

As a partner in APSR, the National Library is sharing the expertise on digital preservation issues that it gained through activities such as PANDORA.

The Library is also helping the project to develop a sound approach to assessing the obsolescence risk of each file format represented in the APSR repositories, and is trialling a software tool that will alert repository managers of impending obsolescence. The Library is also advising on a strategy for including preservation metadata in the repositories, and will seek to influence the future development of open source repository software (such as DSpace and Fedora) to make use of preservation metadata. The aim of APSR is to make these tools and processes widely available to all those who are aiming to build sustainable collections of digital content.

National Infrastructure to Support Curation

It is unlikely that institutional responses to the challenges of preserving research outputs, on their own, will be sufficient. National infrastructure support will also be needed.

In the United Kingdom, the e-Science curation report ⁷ called for long term funding for data curation, including funding of the Digital Curation Centre on a permanent basis. The Centre will deliver a number of outputs ¹⁰ including:

- an advisory service and help desk
- repository guidelines, and a curation manual
- a programme of research into curation issues
- testing and certification processes.

In the United States, the National Science Board in 2005 released a report entitled *Long-lived digital data collections: enabling research and education in the 21st century*. The report ¹¹ called on the National Science Foundation to develop a clear technical and financial strategy relating the investment in building and maintaining data collections of long term value to the use made of those collections in supporting research and their significance to the wider community. It recommended that research proposals for activities that generate digital data should be required to include a data management plan. It also recommended that more be done to foster the skills of the data scientists who will be needed to support the management of these collections.

In Australia, the Prime Minister's Science, Engineering and Innovation Council (the Government's principal source of independent advice on issues in science, engineering and innovation) ¹² has recently established a Working

Group on Data for Science, which will report to the Government in December 2006. The Working Group will review the current approaches to the management of large amounts of scientific information and recommend a data management strategy “to ensure Australia’s scientific sector provides benefits to the Australian economy, environment, and society”. The National Library is represented on the Working Group.

Access Control Services

Access control services ensure that users gain efficient access to external information resources, where they are entitled to such access. They support requirements such as federated authentication and authorization, and digital rights management. These services form another important component of the national information infrastructure. The major Australian project aimed at developing improved access control services is the MAMS (Meta Access Management System) Project¹⁵.

Under the federated authentication model that the MAMS Project is developing, a user seeking to gain access to any service that is part of the national information infrastructure would be referred back to a home institution for authentication there, and then redirected back to the service provider with a standard ‘security handle’. The service provider would then use this security handle to query the home institution about the user’s attributes. Based on these attributes, the service provider would then give the appropriate level of access rights to the user. All of these processes would occur through machine-to-machine transactions and would be managed by an ‘Access Control Federation’ which will be established as a byproduct of the MAMS Project.

The benefit of this approach is that the service provider will not need to set up and maintain its own user directory and authentication system. The service provider needs to know ‘is this person from an organization that we trust?’ and ‘does this person belong to a class that is entitled to use this service?’ but does not need to maintain individual passwords or certificates, and does not need to know any more details about the user.

The National Library was invited to participate in the MAMS Project because of its work in the directory standards field. The Library will be modelling use cases that are relevant for library

services, and will specify the mechanisms through which user attributes can be related to the service provider’s policies. The Library will also pilot use of the MAMS tools in its own services, including *Libraries Australia*, in order to support federated authentication.

As with the other elements of information infrastructure, there is no reason why this approach could not be used beyond the research sector. For example, it could be a future mechanism supporting access by public library users to a national licensed set of online content.

Conclusions

We have defined research information infrastructure as ‘the set of services that support the discovery and management of research resources and research outputs by the current and future research community’. In Australia, the federal Department of Education, Science and Training is funding improvements to the research information infrastructure.

The National Library of Australia has been a participant in these developments. In particular, the Library has:

- participated in the committee which has advised the Department on the future development of research information infrastructure
- worked to digitize research resources, especially those required to support research in the humanities
- developed integrated discovery services such as the national union catalogue and a service providing search access to all Australian university repositories
- actively participated in three research information infrastructure projects
- worked with partners to develop solutions to the problem of sustaining university repositories to support long term access
- participated in a major national working group to develop a strategy for the management of Australia’s scientific information
- undertaken work in the standards arena aimed at developing improved access control services.

These activities have provided a focus for the National Library in its engagement with the university community. In the process, the Library

has gained an improved understanding of the challenges faced by our university partners, while also being able to share our own experience and skills in fields such as digital preservation. The Library is committed to continue collaborating with the higher education sector to improve the national research information infrastructure.

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Note

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Governmental Libraries Development: an experience of strategic collaboration in the field of social sciences

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Abstract

The Institute of Scientific and Technological Documentation and Information (IDICT), of the Ministry of Science, Technology and Environment of Cuba, (CITMA) convoked a meeting in October 1995 of some governmental and non-governmental libraries and information centres that manage political, social and economic information. The purpose of the meeting was to create a working group to promote the development of such type of centres in the field of social sciences. The group was charged with promoting a closer relationship among the centres and the development of collaborative projects, stimulating partnership, cooperation and coordination of specific tasks. This paper describes the work and achievements of the group, the Comité de Coordinación de Centros de Información Política y Social, COIPS, which now comprises 32 centres.

Keywords: Governmental libraries; Social science libraries; Non-governmental libraries; Academic libraries; Research libraries; Decision making process; Library collaboration projects; Cuba

Introduction

To assist the public administration organizations in the process of decision making, regarding their plans, politics and practices, is one of the main purposes of research in social science. The acquired knowledge, the collected data and the research findings reach the decision making officials by different channels such as: direct contacts, requests to specialized professionals, experts, consultants, advisors committees, mass communication, universities, knowledge networks, Internet, clearing houses, specialized documentation centres and libraries, among others. Whether it is accessed at first hand or by intermediaries, or if it is a printed document or a digitized one, published or not, the collected data, the concluded information or the results of the analysis made, contributes one way or another to endorse the decision-making. It is evident, moreover necessary, for the relation of the social sciences with the decision making process of governmental organizations, in particular, to deal with social problems and economic development. There are no doubts about the contribution that demographic, economic, educational, environmental and psychological information, among others, make to governmental action. The information resulting from researches in the social sciences contributes to better understanding of the nature and scope of social problems, providing a frame of reference for decision-making. In this sense, to promote the use of the information and knowledge, the alliance between the governmental and non-governmental organisms, academic and research institutions, and the development of collaboration projects, are of decisive importance. Decision-making is a complex process, a very complex one, in which many factors take part and

where a multidisciplinary and interdisciplinary endorsement is required, involving the social sciences.

Antecedents

On 19 April 1963, by law No. 1107, the Cuban Government created the Institute of Scientific, Technological Documentation and Information (IDICT), which was assigned to the National Commission of the Academy of Sciences of Cuba (ACC). Among its main purposes was: to define the bases for the organization of a system of scientific and technical information.

On 17 September 1976, the President of the National Council of Science and Technology emitted Resolution 2/76, creating the National System of Scientific and Technical Information (SNICT), headed by IDICT, and establishing filial centres in the different provinces of the country.

In 1984, by Resolution No. 16/84 of the ACC, the IDICT was named as being in charge of the SNICT.

In 1989, as part of the SNICT development project, the IDICT created various Committees of Information and Coordination that grouped different organisms of information working in similar areas of knowledge that could fulfil collective work of common benefit. Among them were:

- the Cooperation Committee on Economic Sciences (COSDE)
- the Cooperation Committee on Agriculture
- the Cooperation Committee on the Sideromechanic Industry.

Other information committees were created that brought together the coordinated efforts of special libraries and/or centres of information on diverse subjects.

Development

In October 1995, after the creation of the Ministry of Science, Technology and Environment (CITMA), IDICT, as a CITMA organization, convoked libraries and information centres involved in political, social and economic subject areas, some of them pertaining to organisms of the central public administration, with the purpose of

creating a working group within the framework of the National System of Information (SNI). The mission was to develop the accessibility and availability of information resources and existing informative services in the country in those fields of work, promoting relations among the organizations and the establishment of projects of collaboration and strategic alliances, stimulating cooperative and coordination-oriented efforts to ensure the best exploitation of their resources and stimulating the exchange of information and experiences between the organizations, given that all the centres worked on social sciences subjects.

The Comité de Coordinación de Centros de Información Política y Social (COIPS) started its activities by designating a Board of Coordination and creating several working groups. At the present time its members include 32 information organizations with complementary subject profiles within the field of social sciences.

Purpose of the COIPS

The main purpose of the COIPS was:

1. To constitute itself as an instrument to foment the development of cooperation among libraries and centres of documentation, research and academic institutions specialized in the fields of social sciences and the libraries of governmental organizations.
2. To provide the greater availability of and the necessary access to information and knowledge needed for decision-making, taking into consideration that libraries play a fundamental role in providing permanent access to information and knowledge; that the citizen is the central point of interest of the 'information society'; and the importance of political, economic and social information for the social and economic development of the country.

To this end the following actions were identified:

1. to promote activities of cooperation among national institutions
2. to focus on the social priorities of the country
3. to identify problems, difficulties and sensitive areas in the organizations, in the process of adaptation to the new conditions required by

the Information Society, and contribute to their solution

4. to promote the application of the new technologies
5. to disseminate widely the information that exists in the different specialized centres of the country
6. to facilitate access to this information through the cooperative creation of products and informative services based on information technologies.

The Committee should:

1. identify the political, economic and social information needs of the governmental organizations that demand collective efforts
2. promote the use and development of information technologies on behalf of the diverse needs of information of the country in the different subject areas
3. promote the development of the centres towards centres of multimedia knowledge
4. contribute to the permanent training and professional development of its members
5. promote research and development projects on information services and products in the fields of politics, economic and social subjects.

The Centres should:

1. work in collaboration to develop tasks of social impact
2. avoid the duplication of tasks in similar areas of work, working in a coordinated manner
3. collaborate effectively in ensuring the availability of and access to the economic, political and social information that they process.

Members

The organizations whose centres of information and libraries integrate the Committee at this moment can be grouped in 3 categories:

- governmental, in charge of decision-making
- non-governmental
- academic institutions

The nine libraries of governmental institution members are: National Assembly of the Popular Power; Central Bank of Cuba; Ministry of Culture; Ministry of Foreign Relations; Ministry of Economy and Planning; Ministry of Finances and Prices; Ministry of Justice; Centre of Information

of the Supreme Popular Court; Ministry of Foreign Trade.

There are eleven libraries of non-governmental organization members: Association for the Unity of our America; Centre of Studies on Europe; Centre of Studies on Africa and the Middle East; Centre of Studies on Asia and Oceania; Centre of Studies on America; Centre of Studies on the United States; Press Information Centre; Psychological and Sociological Research Centre; National Association of Economists Advisory Agency (CANEC); Cuban Women Federation; Cuban Movement for Peace and Sovereignty.

There are also ten libraries of academic institution members: Central Library of the University of Havana; Centre of Studies on Management Techniques; Institute of Philosophy Information Centre; Centre of Information on Tourism; Centre of Information and Computer Science Training for Lawyers; Institute of History of Cuba; Higher Institute of International Relations; Centre of Studies on Migrations of the University of Havana; Psychological and Sociological Research Centre (CIPS); Centre of Studies on Martí.

Informative Potential

In order to give an idea of the informative potential of the COIPS Centres, we can mention some collections and databases that at present are hosted in some of the organizations which constitute the Committee, as a sample of the accessible information they have:

Central Library of the University of Havana

More than 30,000 publications on social sciences
1,128 serial publications on social sciences

Centre of Studies on Europe

More than 14,500 publications on European subjects

Centre of Studies on America

Information on Cuba of the period 1988–1998

Ministry of Foreign Relations

Chronologies of the foreign relations of Cuba
24,000 books on social sciences

Higher Institute of International Relations

Database of 25,000 registries of magazine articles on international relations and international policy

National Assembly

More than 4,000 parliamentary documents
Collection of the Official Gazette since 1902.

As can be appreciated, the centres of the COIPS cover the following social science subjects: finance, economy, planning, law, tourism, foreign affairs, foreign trade, peace and sovereignty, women, psychology, sociology, environment, management techniques, philosophy, and the history of Cuba, among others.

Activities of the COIPS

The main activities of the Committee were designed as follows:

1. Periodical meetings in the participant centres that have improved their services or developed novel products and could offer them to the other members of the COIPS, allowing mutual knowledge of their informative potentialities and their products and services at an important level of detail.
2. Arrangement of masterly conferences on the organization of information networks and novel subjects or exhibitions of new systems and advanced information models, to contribute to the professional knowledge development of the librarians. The needs of the centres were identified and known, and opportunities were settled to establish specific collaborations and strategic alliances.

Among the activities developed by the Committee in the years of its existence we can emphasize the following:

- exploratory activities took place to identify the informative potential of the organizations, as well as problems or difficulties, applying the research techniques of surveys and interviews *in situ*
- a directory of the institutions that is updated constantly
- a survey of software used in the centres for the development of databases and other products

- trainings on the use of software were offered to the centres by specialists of the IDICT, to help or improve the development of the databases of the centres
- demonstrations of software and databases developed by the centres were organized
- upgrading of old data bases systems in use by specialized technicians of IDICT
- the promotion of bilateral collaboration to face the needs and problems of the centres
- the promotion of scientific events on various subjects
- collective and cooperative participation of the centres in international events, allowing the promotion of their services and products
- orientation and rules of the National Information System were given to the centres
- advice on the application of statistical models by means of which the data on services and users are reported to IDICT
- exchange of information by electronic means.

These activities helped to increase the social impact of the centres by widening the dissemination of governmental and technical specialized information, and to share the knowledge generated in the field of social sciences, contributing to the creation of new knowledge that impacts the social and economic development of the country.

More recently, with the national project of informatization of the Cuban society, the use of new technologies of information and communication in the sphere of public administration, in the enterprise system, and in academic, educational and research spheres and in centres of public access in general, have undergone significant extension.

Results

We can identify as the greatest profit of this experience the level of integration and collaboration reached among centres participating in the COIPS, to the benefit, not only of the governmental institutions, but also of the remaining social science organizations. Also we have obtained a wide exchange of experiences between the member centres, to find and share solutions to common problems and to compare models of organizations, working systems and services. The establishment of strategic alliances among the centres and the development of joint programs helped to increase the knowledge of information users needs in the field of social sciences.

Conclusions

At the time the COIPS was created, the national information and communication infrastructures were still insufficiently settled in our country, stressing even more the need for projecting a program of coordination and collaboration among centres as a strategic plan, foreseeing and taking into account the growing impact the new technologies have in the handling, transference, quality and immediacy of information. At present, in the context of a national program of massive informatization of society, with substantial investment in the technological infrastructure (Santos Riveras, 2006), the readiness of the centres to take advantage of the new information technologies, favoured in part by the coordination efforts of the COIPS, increases the visibility of the centres via electronic media (multimedia, web services, etc.), thus extending the availability of and access to information and knowledge in the field of the social sciences, favouring decision-making on behalf of social and economic development.

In the recently celebrated International Congress of Information, INFO'06, organized by IDICT, La Habana, the project of the Cuban Network of Science Site was presented (Alonso Becerra, 2006) as a space of collaboration and interaction between scientific institutions, with access to databases, virtual libraries, and other Cuban sites of science and knowledge in general, including the social sciences.

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Note

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Government Information and Centers of Business and Legal Information in Russia

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New Russia is based on the principles of law and freedom.

Valery Zorkin, Chairman of the
Constitutional Court of the Russian Federation

*Information is power. Access to the information is
the condition of freedom.*

Daniel Bell

Abstract

Russia is among the information-richest states with information resources vast both in traditional and in new technologies. The Russian state, acknowledging the provisions of international documents on these problems, seeks all the possibilities to make access to the most important information easier for everybody. Among the institutions responsible for collecting, organizing and disseminating the information, libraries play a significant role. At the beginning of the 1990s Russian legal reform specialists came to the conclusion that the major problem is where to locate authoritative sources of official information and legal knowledge to ensure they could be open to general use. Russian experts considered that such a source could be Russia's public libraries. The library system built during the years of Soviet power proved to be both steady and flexible and the library community was the most receptive of all to change. The paper describes how, building on the solid base of libraries, the government reformers in 1993 created specialized models of information access throughout the country, such as centers of business information, centers of legal information and their modifications. The system is functioning very effectively.

Keywords: Access to information; Government information; Legal information; Business information; Centers of business and legal information; Russian Federation

Information and its Significance for Society in Russia

The development of the information society in our country is accompanied by several peculiarities and problems as a result of the coincidence in time of the information revolution and the inherent social-political reconstruction process. With regards to information, Russia is one of the richest states and its information resources are vast both in traditional and in new technologies. The state information resources of the country are formed and used in the framework of the state and branch systems such as state government bodies, bodies of scientific and technical information, statistics, systems of education and the great information resources of libraries, archives, and museums.

For Russia, with its enormous territory and insufficiently developed social infrastructure, the significance of new information and communication technologies (ICTs) in the building of a modern

information society can scarcely be exaggerated. At the same time, one cannot observe significant changes to the available systems used for disseminating information. The limitation, or even absence, of access to ICTs deprives the people of the possibility of exercising their rights in full measure. In addition, the appearance of various forms of property ownership, (other than state), such as municipal, corporate, private, joint, foreign and others, means that the possession of the information and access to it is diffused and disaggregated. Free access to and management of the full corpus of information is very difficult.

The Russian state, acknowledging the provisions of international conventions on these problems, seeks, as far as possible, to make political, socio-economic and research information public and thus to make access to key information easier for everybody. Access to government information and, especially, to the part which is designated as 'public significant information' is a special priority.

At present many structures take part in the dissemination of government information in Russia but the problems of providing a unified information space in the country have not yet been overcome. The Ministry of Economic Development is at present engaged in implementing ICTs and is making special efforts to integrate information resources created at federal expense. The Federal Special Purpose Program 'Electronic Russia' 2002–2010' (<http://www.e-rus.ru>) is the main mechanism of coordinated state policy with responsibility for implementing information technologies throughout the activities of federal government bodies.

The priorities, principles and directions of the common state policy are defined in the bill entitled 'Conception of using Information Technologies in the Activity of Federal Bodies up to 2010' (<http://www.it-gov.ru>) assented to by Order # 1244-r of 27.09.04 of the Government of the Russian Federation (RF). In accordance with this Conception, the Government Portal has to be a systematizing element. It is the central access point to consolidated government information and departments' services for all the Internet users. It has the following tasks:

- creating and maintaining electronic access
- provision of information

- expert support to citizens and business in various types of interaction with government bodies.

Practical realization of state policy in the sphere of ICTs demands the development of information legislation as a system of mutually related legal rules. At present in Russia the legislation which regulates relations in the domain of information and ICT development is growing very rapidly. Since 1995 the law 'About Information, Informatization and Protection of Information' was in force, but in 2006 the basic law 'About Information, Information Technologies and Protection of Information' was adopted. The Constitution of the RF, federal laws, and the laws relating to members of the RF contain many regulations concerning information problems.

The executive order of the Government of the RF 'About Providing Access to Information on the Activities of the Russian Federation Government and Federal Executive Bodies' (# 98 of February 12, 2003) became the basic source in the domain of systematizing the documents of state government bodies and providing access to all citizens. Many regions of Russia have accepted the normative documents on these problems and are implementing the Information Policy successfully. Among the leaders are the administration of Kchanty-Mansijsk region (http://www.neweco.ru/docs/law/hanty_mansy/18.htm) and the regions of Perm, Smolensk, Moscow and others.

At present, however, analysis of the situation in the country shows that the systematization and provision of access to information is somewhat 'patchy'¹ and enormous work is ahead to overcome digital inequality and to create new information resources for fulfilling the constitutional rights of citizens for information.

The creation of a fully-fledged system for providing free access to governmental, socially significant information for the whole population of enormous Russia on the basis of modern information technologies remains a complex and wide scale task. The creation of such a system is impossible without cooperation and partnership between the state, civil society, the private sector and international organizations. The creation of new forms of such cooperation is already in the making. Representatives of private business play an important role in defending

and realizing human rights in Russia. Therefore, effective cooperation and partnership among and between private business, government and civil society underlie the creation and functioning of the centers of legal and business information. Among significant universal state systems that provide access to state information it is necessary to specify the information system of the Federal Agency of Government Communications and Information (since 2003, 'Spezsvyaz of Russia') (<http://www.systema.ru>).

A free market of commercial systems for legal information was formed in Russia. This became one of several profitable and sufficiently stable sectors of the information market owing to the fact that legal information was one of the most significant information resources from a business point of view. This is probably the only sector where competition and cooperation between state and commercial information services are becoming a reality. Among private companies which specialize in the creation and dissemination of databases of the most important products of government operations – normative-legal information – the absolute market leaders are the firms, Garant (<http://www.garant.ru>), Kodeks (<http://www.kodeks.ru>) and Consultant Plus (<http://www.consultant.ru>). These companies took an active part in the creation of the centers of legal information.

Among the institutions responsible for collecting, organizing and disseminating the information, libraries play a significant role. There are more than 150,000 libraries, subordinated departmental and administrative principles in the Russian Federation of which 51,000 are public libraries. Under the authority of the Ministry of Culture and Mass Communications are 9 federal libraries; 217 central libraries covering all 89 members of the RF, and 49,700 public libraries (city and municipal), of which 39,400 are situated in rural settlements and 10,300 in cities. The resources of 150,000 Russian libraries are the largest public traditional information source in the country. The library infrastructure permeates the entire society and is in practically all the settlements. During the past 15 years after 'perestroika', Russian libraries have been testing various innovation processes. On this base they are creating new structures and are summoned to answer the challenges of a modern rapidly evolving social environment.

Information technologies play an important role in these library activities.

At the beginning of the 1990s Russian legal reform specialists carefully studied the international experience and environment. They came to the conclusion that the major problem is where to place authoritative sources of official information and legal knowledge to ensure they would be open to general use. Russian experts consider public libraries an ideal source. The library system built during the years of Soviet power proved to be both steady and flexible and the library community was the most receptive of all to change. Government thus created specialized models of information access in the country on the basis of libraries. They function very effectively. Centers of business information, centers of legal information and united centers of legal and business information, electronic (or virtual) centers of legal and business information and centers of public access have been created since 1993. Following, we examine the story of their creation, their purposes, their similarities and differences and their reaction to change.

Centers of Business Information – Information for Business and the Business of Information

The success of the firm depends upon the information known as business intelligence or business knowledge. Business information is an essential structural element of business knowledge and makes it possible for business managers to have some knowledge about the internal and external environment. The main objective for collecting the information is the necessity to form knowledge or intelligence and make the best possible decisions with a minimum of uncertainty. The most frequent sources of business information are: government institutions, libraries, trade associations, companies which deal with scientific research and information, newspapers and magazines, business information services and online databases.

From the beginning of Russian market reform a new infrastructure for supplying business began to take shape, where libraries tried to take an active part by creating special structures or centers of business information. Business centers were created with

the aim of furthering the development of systems for information support for business and formed a normal business information market in Russia. They promoted the development of resources of qualitative, timely and trustworthy information for Russian business. The specialists of the centers aim to develop operative business information in the sectors of legislation, economics, management, and marketing. They manage complex information services on questions of Russian legislation, business activity and problems of legal regulation. Officially the first center of business information based on a library appeared in 1993 at the State Public Scientific Technical Library of Russia (GPNTB of Russia). Many know this library as the organizer of the famous Crimea conferences.

The centers of business information (CBI) appeared in the first years of reform in various regions of Russia – as the saying goes, obeying the call of time. The managers' capability for innovation, for enterprise, for understanding local government powers, and last but not least, foreign colleagues' help, contributed to the creation of very specialized structures. The first centers of business information were often guided by the experience of foreign business libraries. Several libraries were fully reconstituted as specialized business libraries, but more often the centers of business information were only part of a library. The Kievskaya Central Library System, one of the most advanced Moscow libraries, has played a great organizational and methodological role in the creation of CBI.

In 1997 the Interregional Association of Business Libraries (MADB) was founded. The main tasks of the MADB are:

- uniting the support and coordination of its members' efforts for maintaining and developing the activity of Russian libraries in the domain of business information
- service for the business needs of the population; establishing and strengthening the positions of libraries in the information continuum.

The MADB President is Irina Borisovna Mikhnova, e-mail: madb@library.ru; <http://library.ru/1/madb>. The geography of these centers is very extensive; they are scattered all over the country.

The specialists of MADB identify the following conditional groups of the centers of business information:

- specialized public libraries having extensive collections on economics, law, business, which are formed mainly with the help of direct relations with central and regional publishing houses (for instance, Moscow Business Library, <http://www.mgdb.ru>)
- public libraries with various services, oriented to satisfying the comprehensive needs of businessmen concerning information, communication, education and culture
- public libraries, which have departments where the basic activity is providing the population with business information (e.g. Information Center 'Modem' Kemerovo. <http://www.kemcbs.ru>; <http://www.bibliovita.cbs.vvcom.ru>, and others)
- specialized information departments of large scientific and scientific-technical libraries (e.g. Business Information Cabinet of Russian National Public Library for Science and Technology (GPNTB of Russia), <http://www.gpntb.ru/win/gpntb/info004.html>; Conjunction Information Cabinet of Novosibirsk GPNTB, <http://www.spsl.nsc.ru/win/h212.html>; Business Information sector of Chelyabinsk Regional Universal Scientific Library (OUNB), <http://www.unilib.chel.su>; Technical Literature Section of Murmansk OUNB, <http://www.murman.ru/culture/library>)
- children-youth libraries, which provide information support to youth-run businesses and work with foreign public funds, whose financial assistance provides access to the information for such social categories as students (e.g. The Center of Business Literature and Information of the Russian State Youth Library, <http://www.rgub.ru>)
- scientific-technical and trade-union libraries of large enterprises which provide business information to their specialists and the city population
- sections of business literature, business information and book centers of university libraries (e.g. Saint-Petersburg Technical University site, http://www.ruslan.ru:8001/spb/univer/tu/tu_cdi.html; the universities of Ekaterinburg, Kemerovo, etc.).

Centers of business information based on libraries have their own story of development and growing and diminishing interest in them. There can be several reasons for these trends. Over the years the commercial business service infrastructure had been established and it was difficult for libraries to compete in gaining access to the sources of business information. In some places, it was necessary to overcome doubts that libraries could function as commercial information centers capable of providing the quality of information needed. Nevertheless many libraries in many regions of Russia confidently found their niche. An example of successful resolution of the diverging factors is the activity of the CBI of Tula Regional Universal Scientific Library. In the first post reform years owing to the absence of competent sources of business information many libraries began to develop their own resources. The Tula Regional Universal Scientific Library adopted the model of integrated resources, having created the regional net of business information on the basis of Centers of Legal Services (CLS) of municipal libraries of the Tula region. The principle of distributed collections and accumulation of information resources in a common center was taken as the base for forming the databases of commercial information 'The Producers of Goods and Services in Tula Region' (<http://tounb.tula.net/library/otdely/idc.htm>) and the net itself.

These databases have been created since 1998 and updating is completed yearly by the whole net of municipal libraries. The information input is programmed to maintain databases in accordance with the norms and standards accepted by the Department of Informatization of the Tula Region Administration and to share the accumulated information resources. Among permanent CBI users there are the representatives of small and medium business and large-scale business of the Central region, which use information resources to find business partners, place orders, to present new goods and so on. Other users are all-Russia firms working in the business information sphere to represent the information of the Tula region in Russian and foreign markets and also executive and legislative government structures who use the information to make management decisions and to analyze the development of various sectors of regional economics.

It is difficult to consider as satisfactory the present accessibility of state economics and business information resources at the present stage of information society development. Owing to the absence of official equal access to information which was created at the expense of taxpayers, the advantages of the information market are gained by commercial firms attached to various state structures. These firms use the collected information resources free of charge and sell them in the market at commercial prices. (It should be said in all fairness that some of them supply budget organizations at reduced prices or free.)

In addition, independent commercial firms are very active in the market. Our experts estimate that more than 40 agencies have as their sole business the market of exchange and financial information. Financial-economic information is widely represented in the Internet and there are more than 1,000 sites providing complex support to business. Among them one may include the Center of Business information of the Chamber of Commerce and Industry of the RF (<http://www.tpprf.ru>), Alliance-Media (<http://www.allmedia.ru>), the Information Center for Business Support (<http://www.smb-support.org>), the Resource Center of Small Business (<http://www.siora.ru>), RosBusinessconsulting (<http://www.rbc.ru>) and others. All of them were created between the year 1997 and the year 2000.

After creating the infrastructure for meeting the needs of businesses, the activity of library business centers subsided. Libraries continue to take part in the distribution of the information, providing it on a non-commercial basis. The guarantee is high accessibility of libraries and the specialized library structures of centers of law and business information as well as the breadth and depth of their collections.

Many libraries create centers of business information on the basis of the collections of normative-technical documents and patents, which are always widely represented in universal scientific libraries. For instance, several regional libraries (such as Kostroma, Rostov-Don and others) work with their clients quite confidently. The resource base of the Center of Business Information of the Russian State Library is based on a collection of 2 million standards, official

regulating and methodical materials, normal and technical terms, building, sanitary and other norms and regulations, approved by ministries and departments, instructive documents and patent materials. At the same time they adopt and fulfill regional programs of State Support of Small Business which are presently evolving and where libraries also take part.

In many regions there has been a very good experience of joint activity of state and local administrations, of organizations for creating the infrastructure for the support of business and for creating favorable conditions for the development of the regional information environment. The most effective activity of business centers in small municipal structures is in rural regions; see, for example, the document 'The Strategy of the Social-Economic Development in the Pestyakov Region of Ivanovo Oblast.' (<http://www.rustouns.com/print.php?id=003042111373>).

The main users and potential clients of business information centers were and still are the representatives of small business in Russia. During the years of market reform small business became a stable sector of the economy, but its potential is still not fully realized. Among the main reasons for the low efficiency of small business activity in previous years is the absence of working capital and lack of development of the mechanisms for financial and credit support. Further development and success of business information centers mainly depends upon the increase of the numbers of their users by whom they are guided – representatives of small business. The situation in Russia is now favorable and at the present time the draft law concerning small business is now under discussion. It presupposes three categories of companies: microcompanies (up to 15 persons), small companies (from 16 to 100 persons) and medium companies (from 101 to 250 persons). After the law is adopted, these companies will get guaranteed state support.

The people in our country proved to be prepared to develop a new mode of production quickly – our people, in spite of the slow economic growth and social-political crisis, are still among the most educated in the world, capable to perceive and generate new ideas and to adapt to the changing technical-economic environment. Now there are about one million small enterprises in Russia, which employ 17 million people. In 2005

the government allotted RUB 1.5 billion for the support of small business. In 2006 it will be doubled to RUB 3 billion. "Our aim is by 2010 to achieve the share of a small business in GNP at the level of 40 percent, and employ 50 percent of working people" to quote our Minister of Economic Development, German Gref.²

Public Centers of Legal Information – Russian Model of Universal Access to Public Information

Up to the present 1,387 Public Centers of Legal Information (PCPI) have been created in our country, based on libraries³. These centers collect the federal and regional legislation acts of Russia, municipal acts and standards of international law and make all of this accessible to the citizens. During the years from 2000 to 2005 alone, more than 4 million citizens addressed queries to these centers and were given about 4.5 million references. An analysis of all the inquiries has demonstrated multiple legal problems of citizens, concerning housing and communal services, pensions, military service, rights of youth, business activity and so on. This outstanding demand for information first of all demonstrates the great need for such centers, not only for socially unprotected citizens, but also for small business and even for professional jurists. It also shows the need for further development and strengthening of the PCPI net.

The history of creating such centers began in June 1998 in Smolensk, where the first Public Center of Legal Information in Russia was opened on the solid base of the universal scientific library. Providing free access to the information is the main thrust of the modernizing policy of the Ministry of Culture of Russia in the domain of library affairs. This is the main aim of reforming the whole system of information and library services in the country. The Smolensk initiative was therefore eagerly accepted by the Russian Ministry of Culture as a good example for other libraries of the country. At the end of 1998, with the support of the Chief State Legal Administration of the President of the Russian Federation and the Legal Administration of the State Duma of the Federal Assembly of the Russian Federation of the Ministry of Culture of Russia, the Federal Agency of Government Communication and Information at the President of the Russian

Federation (FAGCI) and the Russian Foundation for Legal Reform (RFLR) developed and accepted the Program, 'The Creation of All-Russia Net of Public Centers of Legal Information on the Public Libraries Infrastructure'. The Program was completed in several stages.

The First Stage (1998–2000)

In this stage it was planned to create fourteen Public Centers of Legal Information on the basis of two national libraries – the Russian State Library in Moscow and the Russian National Library in Saint-Petersburg – and twelve central universal scientific libraries in the members of the Russian Federation (Smolensk, Bryansk, Orel, Tula, Tambov, Ryazan, Rostov-Don, Ekaterinburg, Krasnodar, Stavropol, Krasnoyarsk, Lipetsk). The division of responsibility between the coordinators of the Program was as follows:

The Ministry of Culture of Russia, using its authority and administrative and informational resources, carried out general coordination, advancing and monitoring the project, developing organizational and methodical materials and cooperation with regional organs of culture and libraries. The RFLR financed the buying of office equipment and technology for the PCPI, carried out conferences and seminars and the issuance of organizational and methodical materials and organized the publication and dissemination of current legal materials among the PCPI.

FAGCI, on a non-commercial basis, provided the legal information databases of the Science and Technology Center 'Systema', which contained official documents of federal, regional and municipal levels on electronic carriers, on communication channels and on interested technical specialists. Libraries carried out the necessary reorganization, allocated accommodation and provided specialists who had knowledge and skill in reference and information services.

As a result, by spring 2000 fourteen PCPI were opened and began their activity successfully. The centers at the Russian State Library and the Russian National Library also began to fulfill scientific and methodical functions for the whole net of PCPI. The governments of many members of the Russian Federation took an active part in the realization of the Program. They adopted appropriate methods for creating PCPI and

supported them financially. During this period the coordinated activity of organs of information resources and telecommunications, FAGCI government communication centers and universal scientific libraries played a very significant role.

The Ministry of Culture of Russia and RFLR helped considerably by developing the net and supplying the centers with the technical equipment. In the years 1999–2000, the Ministry supplied 58 regional scientific and municipal libraries with computer equipment for developing technical complexes at the Public Centers of Legal Information. Total financial expenditures amounted to about USD 350,000. The key element of the Program was the close coordination of the state with commercial structures, forming many different partnerships. The Ministry of Culture concluded the agreement about free or preferential information support of PCPI with leading producers of legal information systems – private companies Consultant Plus and Kodeks.

Great quantities of electronic and traditional legal publications were received from sponsors and disseminated among the PCPI on charitable terms. The Ministry of Culture of Russia, the Agency for Development of Business Technologies, such publishing houses as 'Legal Literature' of the Administration of the President of the Russian Federation, 'Jurist' and others provided significant free support to regional libraries.

At the beginning of 2000 the idea of creating Public Centers of Legal Information was supported by the Open Society Institute (Soros Foundation) which promoted the creation of scientific and methodical centers of comparative law at the Library of Foreign Literature and concentrated its efforts on the opening of centers in small towns of Russia. As a result during 2 years about 40 Public Centers of Legal Information were opened on a competitive basis. There was a rather wide public relations campaign for explaining the PCPI activity in federal, regional and local mass media. It promoted the involvement of new regions, advancing the ideas of informing the citizens about legal matters. Little by little, the creation of Public Centers of Legal Information was becoming not only a necessity but also a very reputable business. The experience of the first years of the Program showed that the PCPI net was of great social value, was actively demanded by the population and needed further development. It

provides remarkable possibilities and is a model of joint decision-making on socially important national tasks by state, non-state and business structures. The development of the all-Russia program favored the forming of regional programs of legal information, which stipulated the creation of the wide net of centers and subscriber terminals in state and municipal organs, libraries, scientific and educational institutions. The results achieved became possible only because of the great demand of such centers by all level of authorities and, of course, by the population.

Owing to another RFLR project 'Legal Education in Schools' the first steps were made in joining children and youth libraries to the process of creating legal centers. The RFLR granted 150 complete sets of textbooks on legal themes to these libraries. Legal information centers for children and youth were created in Smolensk, Saint-Petersburg, Krasnodar, Nizhny Novgorod, Murmansk, Perm and many other cities of Russia.

For the professional support of Public Centers of Legal Information it was necessary to attract jurists on a non-commercial basis. For the first time such practices appeared in the scientific library of Smolensk region. The official opening of PCPI in the framework of the All-Russia Program called into being congenial competition between regional administrations and libraries and created a kind of order of priority for being included in the second stage of the Program. The administrations adopted and began developing their own programs for creating PCPI nets in such regions of Russia as Saha-Yakutia, Tchuvashia, Stavropol, Murmansk, Perm and Smolensk and some others. For instance, during the realization of the project 'The Legal Informatization in Smolensk Region' on the united software and hardware basis, about 200 public centers and access points of legal information were created, including developing the necessary technology. In the process of creating the permanent regional networks of Public Centers of Legal Information the legal operating basis of the centers and their relations with their administrations were carefully developed.

In many regions as a result of PCPI activity there were additional initiatives aimed at increasing the participation of citizens in lawmaking activity at local, regional and federal levels, in discussing the effectiveness of already enacted laws and in

establishing the interacting between centers and legislative and executive authorities. Thus libraries began to become the forums of lawmaking discussions of citizens and public organizations, which could seriously influence the legal culture of the population.

The same situation evolved at the universal scientific library in Tula region where in the framework of PCPI the so-called 'public reception office for the civil legislative initiative' was created. The activity of PCPI as an intermediary between power structures and population is able to influence the growth of civic awareness and promote the inclusion of citizens in public fora. The development of the net of regional and municipal PCPI, using the unified software and hardware of FAGCI, solved the problem of accessibility to local legal information and created in Russia a unified legal information space. As a result of all the efforts, by the end of 2000, instead of the planned fourteen PCPI, more than 200 centers had been created in the country.

The Second Stage (2002–2003)

In 2001–2003 the PCPI net was actively and steadily developing, being supported mainly by regional and local resources. By the end of 2001 the net had already 600 centers, at the end of 2002 there were 850, and by the middle of 2003 there were about 1,200 Public Centers of Legal Information.

In 2001–2003 the Ministry of Culture of Russia took charge of the main organizational and financial problems. The Ministry of Culture of Russia supported the projects of opening Public Centers of Legal Information on the basis of the central regional libraries of Tuva, Northern Osetia, Yamalo-Nenetz, Amur and Ivanovo regions, and also the opening of legal and municipal information centers in the centralized library systems of Kalmykia, Karelia, Tatarstan, Tchuvashia, of the regions of Stavropol, Belgorod, Vladimir, Novgorod, Perm, and also in Novosibirsk and Penza youth libraries, in Altai, Amur, Kaliningrad, Nyzhny Novgorod, Smolensk and Sverdlovsk children libraries. The purchase and delivery of the newest legal publications for 40 regional scientific libraries was financed.

A sizable contribution towards information provision through creating Public Centers of Legal Information has been made by FAGCI,

whose databases were introduced in 56 percent of centers; by Consultant Plus, whose databases were introduced in 81 percent of centers; by Garant (25 percent) and by Kodeks (14 percent). The significant information potential of the centers, especially at municipal libraries, was developed just by these state and commercial structures on a gratuitous basis.

In 2002 the Russian Committee for the UNESCO 'Information for All' Program joined the implementation of the Public Centers of Legal Information Program, as one of the strategic directions of this flagship Program of UNESCO. This Committee forms the policy and creates the conditions for universal access to the information which is public property.

It is important to mention that already in 2002, practically all over the country, the aims and tasks of the PCPI Program were used by local authorities as the guide to action and its implementation passed from a regional to a municipal level. For this sake the coordinators of the Program, regional cultural authorities and central scientific libraries of the Russian Federation began to conduct numerous practical conferences with the participation of the representatives of regional and municipal authorities.

The decisions of the Board of the Ministry of Culture of Russia that had facilitated the union and integration of the efforts of all the participants of the program at a federal level was of major significance for the development of the Program and promoted further development of the work at regional and local levels.

The fact that about 700 centers based on municipal libraries were developed during a very short period of the recent history of Russia, speaks much about the growing understanding of the extraordinary importance of legal security of citizens at the present time and about the necessity of developing Public Centers of Legal Information, not only at the regional level, but also at the municipal and provincial levels. There were 44 centers created for legal education relating to child and youth law. At the same time Public Centers of Legal Information began to appear in some central regional special libraries for blind people (12 centers).

The Program initiatives were adopted in other ministries and institutions and first of all in

educational institutions of the Ministry of Education (more than 130 centers), the Ministry of Defense, the Ministry of Internal Affairs, the Ministry of Justice of Russia and in some other organizations. The experience of the first years of Public Centers of Legal Information activity shows that their successful development is possible only owing to the constant coordination, communication and exchange of work experience and information resources and analysis of the results. In summary, the development of legal information organization and access strongly demands the creation of the integrated information computer net that unites all the participants of the process.

It is necessary to create 'corporate library legal information centers' on the basis of modern information and telecommunication technologies. Further PCPI activity will greatly depend on the creation of such centers for managing technology that could unite all the PCPI and make it possible to quickly find the necessary information and provide information not only about their own resources but also about other resources and accumulated corporate resources.

At the end of 2003 the Ministry of Culture of Russia published the following statistical data about the first stages of the Program implementation.⁴ Combined expenditures for all the years on the creation of all-Russia Public Centers of Legal Information net are estimated as USD 5 million. During 1998–2003 more than USD 1.2 million was spent by just the federal organizations and sponsors for organizing the regional net of centers.

There are 2,129 copies of legal databases of leading producers of legal information installed and regularly operating and more than 2,000 complete sets of newspapers on legal subjects have been collected. The Public Centers of Legal Information Program was presented at the Second Session of the Intergovernmental Council of the UNESCO Program 'Information for All' (April 22–24, 2003, at the headquarters of UNESCO). Our country presented the mentioned program as an example of a positive experience in the building of a legal and free information society.

The Russian experience in the creation of the net of legal information centers is already very popular among countries of the Commonwealth of Independent States.

Conclusion. Further Perspectives of the Development of Legal and Business Information Centers

In 2002 work on the integration of legal and business information resources in public libraries of Russia began and unified centers of legal and business information were being created. Smolensk region was the first to implement the new project – the creation of a net of electronic centers and points of business and legal information on the basis of libraries, educational institutions and centers of business support. The legal information resources used by PCPI will be integrated with the information resources of the Business Internet Portal of the Smolensk region (<http://business.admin.smolensk.ru>) and with the resources already created in the regional legal and business centers. The Smolensk experience is interesting because center services help users to become oriented in the goods and services market and to better defend their rights. This initiative received the support of the Ministry of Communications of Russia in the framework of ‘Electronic Russia’

Government has also begun to create Centers of Public Access (CPA). This is one of the modifications of PCPI offered by the Ministry of Communications. In the framework of the ‘Electronic Russia’ Program 100 CPA have already been created in remote rural settlements. The experience of creating the specialized analytic public centers of legal information based on educational institutes (for instance, the Academy of Tourism) initiated by the Russian Committee of the UNESCO Program ‘Information for all’ is very interesting.

At present the public centers of legal and business information in various manifestations are opened practically in all large public libraries at the regional and municipal levels and also in many schools, institutes, public and state institutions. They provide services to more than one million people per year and illustrate the great demand for such centers by the population, business structures and administrations of all levels. All these centers are included in the PCPI Program.

The Partnership, ‘Interregional Association of Public Centers of Legal Information’, was created with the aim of organizationally uniting the centers and it was summoned to unite their efforts

and resources. The leading role in it belongs to the Russian State Library. The Director of the Partnership is Emma Voskanyan.

The all-Russia PCPI Portal (<http://www.pcpi.ru>), created by the firm Kodeks, has as an objective the integration of resources, providing for the coordination of the net centers and organize the inquiry line for informing citizens.

The main aim of creating the portal was to overcome geographical and other inequalities in access to legal and business information.

Already the Partnership, which unites multiple centers, and the PCPI Portal which provides informational and methodological and reference service, render valuable support in ensuring the further development of the centers.

As we see, libraries answer the changes of the time and create specialized structures of information access. They have found their niche and use accumulated resources. They are close to people and know their needs. They see and show the shortcomings and demand openness of society.

Today more than 2,000 libraries and other organizations of different affiliations provide legal and business information service for all layers of the population and different institutions of all kinds.

Owing to the opening of the centers the new role of libraries in the life of the local community is more and more affirmed. The centers work actively on the legal education of the population and the information support of local authorities. This plays a great role in the forming of local self-government in the regions.

At present, when the implementation of the Program is entering a new stage, the main problem is that the centers that have already been created function autonomously to a considerable extent. Therefore it is necessary to unite them in a national information net, carry out the unification and certification of their activities, provide modern computer and communication techniques, provide the connection to qualitative communication channels and prepare skilled manpower.

In the process of realizing the third stage governments anticipate a 100 percent inclusion of all members of the Russian Federation (up to 2,500 centers as a minimum) into the net. The Ministry

of Culture of Russia, 'Spezsvyaz' of Russia and the Russian Committee of UNESCO Program 'Information for All' started accomplishing those tasks. If the state gives more consideration to the Program, such results will be reached in 5 years. The volumes of combined special purpose investments to the joint PCPI net during this period must be not less than USD 500,000 a year.⁵

To conclude I would like to highlight once more that Business and Legal Information Centers are of great social value, actively acclaimed by the population and demand further development. The development and implementation experience of the Program shows that it is a beautiful opportunity for state, commercial and social structures to collaborate on wide-scale socially significant tasks collectively.

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Note

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Cooperation on Local History and the Concept of Network Building between Libraries, Museums and Archives in China

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Abstract

Chinese ancient books and local history documents are collected in archives, libraries, museums (ALM), and other academic institutions all over the country. This paper introduces the cooperation in document conservation and cataloging that has occurred between ALM in China. It briefly describes The Digital Local History Project constructed by the National Library of China. Finally, it proposes the concept of cooperation between archives, libraries, and museums in digitizing local history.

Keywords: Local history; Cooperation; Libraries; Museums; Archives; China

Introduction

In China, many ancient books and local documents are collected in libraries, museums and archives, including ancient books of the minorities. For many years, these institutions have not only made great efforts to preserve these valuable documents, but have also made great achievements by cooperating with each other in their collection, processing, and utilization. Libraries have played the decisive role in this cooperation.

In an increasingly digital and network environment, the processing and utilization of ancient books and local history documents should develop in the direction of digitization and online access via the Web. This paper introduces the cooperation that has been done between ALM and *The Digital Local History Project*. Furthermore, some ideas are proposed about the partnership between libraries, museums and archives in digitizing local history.

Contents and Methods of Cooperation

In China it is difficult to unite libraries, museums, and archives into one institution to collect and process documents because they belong to different departments. However, these institutions have been cooperating in processing documents since the 1980s. Until now there have been several methods of cooperation with respect to local documentation.

Investigation and Cataloging of Local History Documents

The first method is the investigation and cataloging of local history documents.

Cooperation in Compiling Chinese Genealogy Catalogs

The Chinese people have preserved many genealogies which comprise one of the important parts of Chinese traditional culture. Pedigrees, biographies, and other materials about a family are recorded in Chinese genealogies, including much material about local history, local literature, migration, demography, sociology, etc. Chinese genealogies are collected in different libraries, museums, archives and other academic institutions. In recent years these valuable documents have been jointly processed and cataloged by these collecting institutions.

Here are three union catalogs of Chinese genealogies which have been cooperatively compiled by libraries, museums, and archives. Among them, one is about the genealogies of Zhejiang province and the other two include genealogies from all over the country.

The first one is the *Chinese Genealogies General Catalog*. This is the earliest genealogies catalog published in Mainland China. In this catalog, 14,719 Chinese genealogies published before 1949 are recorded, including those collected overseas. Based on previous investigations, the Chinese genealogies catalog project was carried out in 1984 under the sponsorship of the National Archives Bureau, the Department of History of Nankai University of China, and the Institute of History of the Chinese Academy of Social Sciences.¹ With the support of the Chinese Ministry of Culture, the National Archives Bureau, and the Chinese Ministry of Education,² staff from 438 collecting institutions participated in the project, including 113 libraries, 230 archives, 29 museums and 66 other collecting institutions.³ This catalog also records the Chinese genealogies from the *Chinese Rare Old Books Catalog* and from other genealogy catalogs published in the United States and in Japan. From the *Chinese Genealogies General Catalog*, the collections of Chinese genealogies all over the world can be learned.

The second one is the *Zhejiang Genealogies Abstract Catalog*. The Jiang-Zhe area had a very prosperous genealogical culture in ancient times. Many Zhejiang genealogies with rich materials and characteristics have been preserved until now. This catalog includes 12,778 Zhejiang genealogies collected in different institutions in China and overseas, as well as 512 titles of genealogies of other provinces collected in Zhejiang province.

The 6,097 titles with abstracts were collected in this province, and 6,681 titles without abstracts were collected in other areas. Zhejiang Library proposed the catalog project first in 2001, and other collecting institutions in Zhejiang province responded to it immediately. Over 200 staff from 102 institutions, including libraries, museums, and archives from province, cities, and counties, cooperatively edited the catalog.⁴ Zhejiang People's Press published the catalog in October 2005. Now, a digital version of the catalog has been published on the website of Zhejiang library, and can be searched on the Internet.

The last one is the *General Catalog of Chinese Genealogies*. This is the first special world catalog of Chinese genealogies. This catalog will record 60,000 Chinese genealogies for 608 surnames published in Chinese before 2003. Besides some private collections, most of the genealogies are deposited in different institutions of China, including Taiwan, Hong Kong, Macao, and other countries all over the world.

The *General Catalog of Chinese Genealogies* project was proposed by the Shanghai Library and adopted at the First Conference of Chinese Resources Cooperation and Development, which was sponsored and organized by the National Library of China and held in June 2000. The conference aimed to provide an opportunity for library and information professionals to discuss and exchange ideas on cooperation in sharing Chinese resources. Chinese document collecting institutions from Mainland China, Taiwan, Hong Kong, Macao and overseas participated in the conference.

Every aspect of a genealogy is involved in the catalog, such as book title, creator, places of domicile, edition, physical description, published time, name of the ancestral temple, key ancestors and celebrities, locations where lineage members settled, etc, that are important materials for research and looking for ancestors. Nine hundred institutions from China and overseas participated in the project, including the National Library of China, the National Museum of China, the First Historical Archives, and other libraries, museums, and archives from different provinces, cities, and counties, as well as from the United States, Singapore, Japan, Australia, and Europe. The catalog will be published soon, and the Shanghai Library plans to digitize it for the public to search on the Internet.⁵

Cooperation in Compiling a Catalog of the Ancient Books of Ethnic Minorities

China has 55 ethnic minorities living in different places; many of them have historical documents preserved today that are also an important part of Chinese culture. These valuable documents record the history, economy, culture, arts and customs of minority areas; some documents have been successfully processed and cataloged by libraries, museums, and archives.

Here are two catalog books of the ancient minorities' documents; one has been finished, and the other is being compiled now.

The first one is the *Catalog of China's Ancient Books in Old Mongolian*. This is the first catalog which gives an overview of ancient books in Mongolian script collected in China. In 1994, eleven institutions, including the National Library of China, the Inner Mongolia University Library, and the Central Nationality University Library proposed the project. As the main sponsor and organizer, the National Library of China took the responsibility of directing and compiling the catalog and applying for support from the IFLA Action for Development through Libraries Programme (ALP).

This catalog records 13,100 titles of ancient Mongolian books and some rubbings from inscriptions, including those published in Inner Mongolia before May 1947 and others published outside Inner Mongolia around the country before October 1949. The catalog also has an appendix that gives a concise bibliography of 365 titles of ancient Mongolian documents republished after October 1949.

It includes the documents of 80 private collectors and 179 institutions, including libraries, museums, and archives. Staff from these institutions from every league or city, county or banner all over Inner Mongolia and from other related provinces participated in the project. The Beijing Library Press published this book in May 2000.⁶

The second one is the *Catalog of Abstracts of the Ancient Books of China's Minorities*. In 1997 the National Minorities Committee started a plan for compiling the catalog in order to investigate the collections of ancient books of China's ethnic minorities all over the country. The abstract catalog is planned to record all the titles of the

ancient books extant today which were written in the scripts of the minority nationalities.

This catalog is classified according to administrative jurisdictions and will be edited jointly by the libraries, archives, museums and other related institutions in different areas. The National Library of China is responsible for ancient Mongolian documents collected in the Beijing area, the First Historical Archives for ancient Manchu documents, and the Chinese Center for Tibetan Studies for ancient Tibetan documents.

The *Catalog of Abstracts of the Ancient Books of China's Minorities* will include 60 volumes, 100 items, and 300,000 titles. So far the Chinese Grand Encyclopedia Press has published the *Naxi* volume and *Bai* volume; the others will be finished by 2008.

After processing and cataloguing, China's ancient local documents will be well utilized in academic research and local economic construction, and they will promote the dissemination of Chinese culture.

Conservation of Chinese Ancient Books

The second method is to jointly carry out the national *Chinese Ancient Books Conservation Plan*.

According to the originally estimate, about 30,000,000 volumes of Chinese ancient books, including the ancient books of ethnic minorities and many kinds of local history documents, are held in libraries, museums, archives and other collecting institutions in China. But many of them are in poor condition and need repair. At the beginning of 2005 the Chinese Ministry of Culture started the *Chinese Ancient Books Conservation Plan* to investigate the quantity and preservation condition of ancient books in China and overseas and to finish restoring valuable documents belonging to the first and second grade relics within 15 years. Ancient local history, genealogies, and minorities' documents should be investigated as part of this plan.

This project needs the participation of all the institutions that collect ancient books. Now, the National Library of China is in charge of the program. The experts in ancient books conservation and restoration from the National Library of China, the Palace Museum, the National Museum of China, the First Historical

Archives, the Central Archives, Peking University Library, etc, are participating and discussing how to preserve China's ancient books.

Uniting Libraries and Archives in One Institution

The third method is to unite library and archives into one institution to collect and utilize local historical documents.

In 2003, in Taida District of Tianjin a new library was constructed. The old library and the archives were merged into one institution with the name of Taida Library but the name of Taida Archives has also been retained. The library has two centers; one is the documents information center for books, the other is the archives information center for archive materials. The two centers have a division of labor but also cooperate with each other in some areas. The library is planning to collect and utilize documentary resources by constructing the *Taida Local Documents Database*, *Taida Talents Database*, *Taida Doctor and Master's Papers Database*, *Taida City Construction Database*, etc. Furthermore, based on the materials collected, Taida Library will compile the *Cultural, Educational, and Health History of Taida*.⁷ As far as Taida Library is concerned, there are still some things to be promoted including standards for collecting and cataloging, building a network, and digitizing documents.

Building and Sharing Ancient Local History Resources

In China, many ancient books and local history documents in the languages of different nationalities are collected in libraries, museums and archives. The three types of institution have been cooperating with each other in organizing, preserving and bringing to light documents and have made great achievements. In the automation and network environment they will have many chances to cooperate, particularly in building and sharing digital resources for local history documents.

Digital Local History at the National Library of China

Many kinds of local history documents are collected in the National Library of China (NLC),

such as local histories, genealogies, Spring Festival pictures, old photos, and literature and historical materials. Some of them have been digitized. As of now, 200 Spring Festival pictures have been imaged and published in the *Spring Festival Pictures Masterpieces* column on the website of the National Library. Every picture has an abstract with a brief story, background, characteristics, and reference information. Besides these pictures 3,000 old photos have also been scanned and provided with a description of the title, time, place and content; these are being prepared for publication.

Digital Local History is a project of the NLC to digitize ancient local histories. The library holds over 6,000 titles in 120,000 thread-bound volumes published before 1949, or 70 percent of the ancient Chinese local histories that are extant today. The *Digital Local History* project is to digitize the collection and create an images database and a full-text database. Based on the latter, several knowledge databases will also be completed. Full-text searching and single and complex searching will be realized between these databases.

Searching on ancient characters and modern characters, variant characters, and taboo characters will also be achieved. The character sets of Unicode 4.0, which consists of 71,000 characters, have been used in the full-text database. The computer can create the variant characters and taboo characters that are not in these character sets; this will avoid having many image characters and make searching more accurate.

In order to facilitate the reading of the original books in the image database, three levels of catalogs are provided, namely the book name catalog, the volume title catalog, and the article title catalog. By searching a catalog users can obtain the exact volume or article directly.

So far about 1,680,000 pages have been scanned and 1,200,000 pages have been transformed into full-text. A portion of the images have been published in the *Digital Local History* column on the website of the NLC.⁸ Now the project is in the process of scanning the rest of the ancient local histories. A complete publishing system for all resource databases is envisioned in which the public can search and browse freely.

Digital Local History is an experimental project for digitization of Chinese ancient documents

that has not only drawn on the accomplishments of past projects but has also enriched experience for the digitization of ancient books in the future. For example, some Chinese characters outside of Unicode 4.0 in the ancient local histories will be reported to the Ideograph Rapporteur Group (IRG) after being discerned by professionals and identified by specialists in ancient characters.

A Chinese local history is the encyclopedia of a region, in which, history, geographical position and conditions, and culture are recorded, including territory, historical events and figures, economic situation, climate, products, mountains and rivers, education, custom, historical relics, etc. Local history documents are the most valuable reference materials for knowing about the history and current situation of some regions, and also for academic research about history, sociology, folk custom and folk literature. *Digital Local History* will facilitate the reader's use of these valuable materials as well as being good for academic research and ancient books conservation.

Cooperation between Libraries, Museums, and Archives In Digitizing Ancient Local History

Many ancient local history documents are collected in libraries, museums, and archives in China, and these institutions have jointly compiled the *Chinese Local History Union Catalog* and the *Chinese Local History Abstract Catalog*. However, cooperation between these institutions is not dynamic enough. Libraries, museums, and archives should increase cooperation in processing and digitization in order to realize the construction and sharing of digital resources. The processing and digitization of ancient local histories can be done step by step.

First, a comprehensive catalog should be compiled based on the catalogs mentioned above and an investigation of the distribution of Chinese ancient history in all institutions, particularly in archives. The quantity and preservation condition of ancient books in China and overseas have not been surveyed yet; it will be done under the *Chinese Ancient Books Conservation Plan*. As one of the kinds of ancient books, ancient local history can be investigated at the same time.

Secondly, an ancient Chinese local histories database should be constructed for the convenience of research by the public on the Web. In many institutions most of the local histories have not

been cataloged yet; this affects the utilization of these documents to a large extent. In order to save funds and time, these institutions can use the catalog data of the NLC, after modifying it according to their different conditions, because over 70 percent of all extant Chinese local histories are deposited in NLC and have been completely cataloged. Now, many libraries and information institutions are jointly mapping out various standards for the digital library. NLC is responsible for the standards for local history and has finished *Local History Metadata Description Standards* and *Local History Metadata Description Regulations* which can be utilized in cataloging local histories in China.

Thirdly, the *Digital Local History* project of the NLC and the construction of the images and full-text resources databases of ancient local history in China should be finished. Now there are over 8,200 titles of ancient histories deposited in different institutions; unique copies are less than 10 percent of the total,⁹ while the others are duplicated in different institutions. It will require a large amount of funds to digitize ancient books, so this should be done cooperatively, and duplicated work must be avoided. The institutions with overlapping collections that have already been digitized by the NLC can share its resources through a contract and focus on digitizing the other 30 percent in their own special collections. The digital resources databases, including all those of the ancient local histories, will be completed at last in this way.

China's ancient local histories are thread-bound books published before 1949, so copyright is not a problem for digitization. But several prerequisites should be established for cooperation between multiple institutions. First, practical programs and agreements for cooperation between them must be mapped out and should involve project management, funds, resources utilization, and rights and obligations. Secondly, various standards for digitizing ancient local history should be spelled out, as well as the principles and methods for solving common problems. With the standards and agreements, digital resources will be cooperatively constructed and shared. Finally, one premise for digitizing local history is financial support. This is a project with significant meaning which must be recognized by the government and the society – it will protect and disseminate our valuable ancient document resources and promote the development of traditional Chinese culture.

Conclusion

The preservation and processing of the ancient books of China's minorities and ancient local histories must be completed cooperatively by different institutions. In the digital and network environments, libraries, museums, and archives should jointly construct and share digital resources for ancient documents. This is the best way to effectively and economically integrate and utilize documentary resources that are distributed among different institutions.

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Note

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Measuring the Impact of Knowledge Management

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Abstract

With the growing popularity of knowledge management, the need for frameworks for evaluating the impacts of knowledge management on organizational performance has been recognized by practitioners. Despite the wide implementations of knowledge management, there is yet no standardized framework for measuring the performance within organizations. This paper provides an overview of the approaches to evaluate the contributions of knowledge management implementations to organizational performance. It presents methods such as return on investment, balanced scorecard approach, qualitative case studies, and success case method to aid practitioners to identify and develop the evaluation frameworks. Thus, it seeks to serve as a foundation for further research and development.

Keywords: Knowledge management; Organizational performance; Evaluation frameworks; Balanced scorecard

Introduction

Confronting today's knowledge-based business environment, companies have implemented knowledge management as a new management technique that can increase competitive advantage. Knowledge management (KM) refers to "a broad collection of organizational practices and approaches related to generating, capturing, disseminating know-how and other content relevant to the organization's business" (American Productivity and Quality Center, 2002). Sveiby (1997) defines knowledge management as "leveraging the intellectual assets of the company to meet defined business objectives." With increasing investments in KM implementations in many organizations, measuring organizational benefits of KM initiatives has become an important agenda among KM practitioners. To maintain continued support of decision makers, practitioners need to ensure that KM strategies have contributed to the organization's performance improvement. Given that gaining continuous support from decision makers is a critical factor for a successful KM initiative, the measurement of KM performance is considered important.

Despite that the methods of evaluating KM performance have been widely studied, no consensus has been reached yet. Although it is difficult to demonstrate direct linkages between KM and an organization's performance, the efforts to examine the interrelationships between the two have been made using both quantitative and qualitative approaches. This paper provides an overview of the approaches to evaluate the impacts of KM implementations on organizational performance as an effort to aid practitioners to identify frameworks for KM performance evaluation.

Frameworks for Evaluating Knowledge Management Performance

KM practitioners are often requested to provide empirical evidence that KM initiatives contribute to corporate objectives. Measuring how much a KM implementation contributes to business benefits can be a challenge because it deals with something intangible. It is not simple to evaluate the impacts of KM strategies on an organization's performance because KM may not be the only factor influencing the organization's performance. It may be affected by other factors such as competitive environment and industry conditions. However, KM initiatives should be able to demonstrate their value and benefits in order to gain continuous support from a variety of stakeholders. Thus, to demonstrate that KM initiatives have created value and benefits, the contributions of the initiatives must be measurable.

Teruya (2004) categorizes KM performance measurements into three general types: internal measurement, external measurement, and inferred value measurement. *Internal measurement* evaluates how well KM strategies are implemented. Performance evaluation of KM strategies can be done using various methods such as surveys, interviews, and satisfaction ratings. The internal measurements often employ subjective measures that quantify one's perceptions by assigning values and weights. *External measurement* involves numerical or financial analyses such as return on investment and benefits to the organization incurred by implementing KM. *Inferred value measurement* is based on speculation and often captures anecdotal benefits.

Academics and practitioners have made efforts to develop the frameworks for evaluating the performance of KM practices. Bose (2004) emphasized the importance of standardized KM metrics to quantify knowledge and convince stakeholders of the value of KM initiatives. With the need for standardized KM metrics, he also asserts that unique standards for measuring intellectual capital and KM initiatives need to be created by each company. Del-Rey-Chamorro et al. (2003) present a framework to evaluate the contributions of KM implementations to corporate objectives using a set of key performance indicators. Gooijer (2000) proposes an approach to measure the performance of KM practices

in public sector agencies. He developed the knowledge management performance scorecard, which is a KM performance framework based on the balanced scorecard (BSC) approach (see below). The framework aims to measure the impacts of KM on an organization's operations. In recognition that KM performance should be considered in a comprehensive business performance context, the KM performance scorecard adopts the BSC as an overall business performance framework and embeds the KM performance elements across the framework. Given that public sector agencies have different objectives and strategies from commercial enterprises, Gooijer recommends modifying the elements of the four perspectives on the BSC to reflect unique characteristics of public agencies. For example, the concept of the customer on the BSC needs to be redefined in the context of public sector agencies. Darroch (2003) developed the knowledge management scales to examine the associations between KM practices and firm performance. The knowledge management scales enable managers to identify gaps and implement effective strategies to improve KM practices in organizations. The scales also help evaluate which areas in KM practices in an organization are well developed and which areas are less developed.

Return on Investment in Knowledge Management

In the projects of developing knowledge management systems, it is often required to calculate return on investment (ROI) of the projects based on objective data and measurable results. Calculating the return on investment helps justify the resources invested in KM initiatives and assess financial performance of the initiatives. In terms of cost and benefit, the ROI calculation may be done simply by dividing the value of benefits by the cost spent on the project (Haugh, 2002). Both the costs involved in the development of a knowledge management system and additional costs such as employee time spent in the operations of the system should be considered. The method proposed by McDermott (2002) to calculate ROI of the communities of practice (CoP) can be adopted to estimate ROI in general KM activities. According to McDermott, a KM practitioner can ask people in the organization to estimate savings in time and cost and financial benefits incurred by KM activities to come up with the value and benefits that the KM activities

have created. Additionally, they can be asked to estimate what percentage of the benefits or savings can be directly attributed to the KM activities and how certain they are about that number. By multiplying the numbers, the return on investment in the KM activities can be estimated.

$$\text{Reported savings} = \text{Estimated savings and benefits} * \text{Percent attributed to KM activities} * \text{the degree of certainty}$$

(Adapted from McDermott, 2002)

Although the estimation relies on individual judgment, not on objective data, it can provide decision makers with the information they need to determine whether the investment in KM practices has created value.

There have been debates among academics and IT specialists as to whether measuring the ROI in IT projects is desirable. Numerical values derived from the assessment of the costs and benefits may be preferred by decision makers. That may be the reason that evaluating the ROI from the fiscal standpoint has been often demanded by top managers. Some IT projects are well suited for the assessment of ROI. Examples may include call center systems and billing applications. However, certain aspects of the return may not be measured by purely fiscal methods. KM projects are not as straightforward as call center systems or billing

applications in terms of calculating the ROI. It is difficult to discern the return on investment in a KM initiative from business financial data because the impacts of a KM initiative cross many business processes, and financial data are affected by various other factors. Due to the limitations of calculating ROI in IT projects based solely on financial performance, new ways of evaluating the value of IT investments have been called for. Recent trends in research in IT investments tend to emphasize nonfinancial returns such as improving customer satisfaction and enhancing the quality.

Balanced Scorecard Approach

The balanced scorecard (BSC) was developed by Kaplan and Norton (1992) to complement traditional financial performance measures and provide a balanced view of both financial and operational measures. The BSC presents four perspectives of performance measures: financial perspective, customer perspective, internal business perspective, and innovation and learning perspective (Figure 1).

Customer perspective on the BSC concerns how well a company meets customers' expectations. Customer-based measures may include customer satisfaction, on-time delivery defined by the

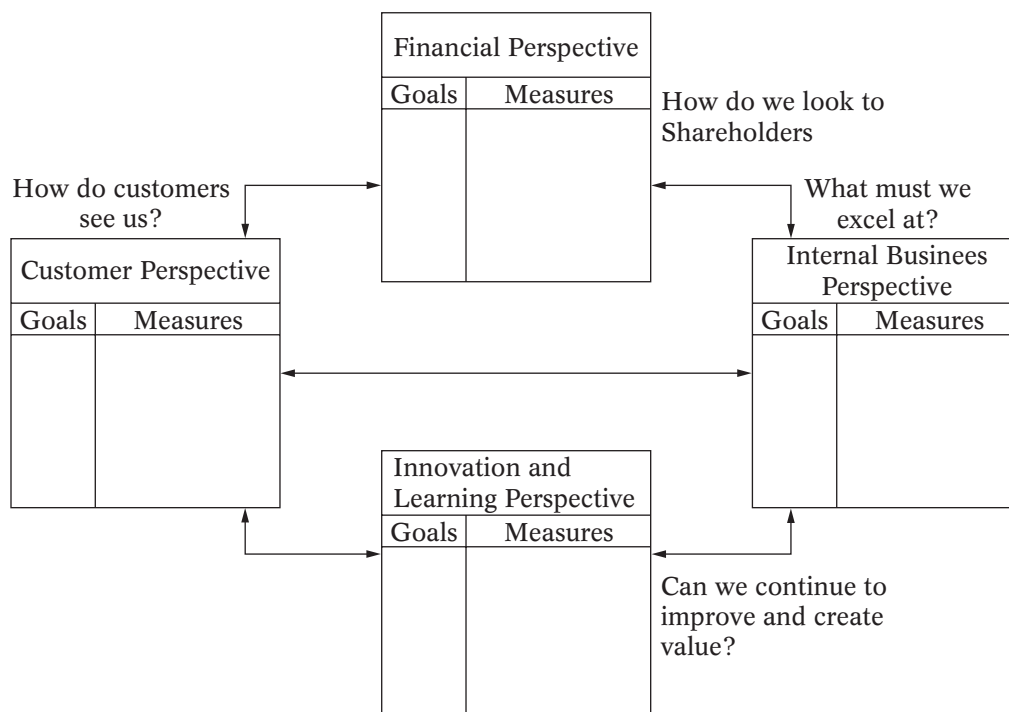


Figure 1. Balanced scorecard.

customer, and price performance. Internal business perspective focuses on business processes that a company should do to meet its customers' expectations. The internal process measures may include cycle time, quality, cost, and productivity. Innovation and learning perspective focuses on a company's ability to innovate and learn, which enables the company to continue to make improvements and create value. The innovation and learning measures may include new product introduction, sales from new products, and process time to maturity. Financial perspective concerns whether a company performs well in terms of profitability, growth, and shareholder value. Financial performance measures include cash flow, sales growth, and return on equity. Financial indicators tend to show the consequences of actions already taken and do not represent the company's current performance in creating value. On the other hand, operational measures such as customer satisfaction, internal processes, and innovation and improvement activities are the indicators that can drive the organization's future financial performance. Some suggest that if a company takes care of its operating performance, financial success will follow (Kaplan and Norton, 1993). However, improvement of operational performance does not necessarily lead to financial success. So, the BSC seeks to provide a comprehensive view of the business by incorporating both financial and operational measures in one report, thereby compensating for the limitations of presenting just one perspective. This way, the BSC enables senior managers to ensure that improvement in one aspect of organizational performance is not the result of sacrificing another (Kaplan and Norton, 1992).

When a company develops a BSC, it should establish general goals and specific goals for each perspective on the BSC and identify appropriate measures based on the goals. Limiting the number of measures within each of the four perspectives on the BSC helps the company focus on the most critical strategic objectives and competitive agendas. An important task of companies implementing the BSC is to make appropriate linkage between operations and finance based on the companies' business objectives and strategies. The chains of cause and effect link the measures of the four perspectives on the BSC. Causal relationships among the measures are based on hypothetical assumptions of causes and effects. It should be noted that measures of customer

satisfaction, internal process, and innovation and learning reflect the company's particular view of the business environment, but it is not guaranteed that the view is correct.

Epstein and Rejc (2005) developed an IT balanced scorecard that includes a list of measures for evaluating IT performance based on the BSC approach proposed by Kaplan and Norton (1992). The IT balanced scorecard is a framework that aids an organization to identify and assess the costs and benefits of IT projects. It can be used to justify an IT initiative at a planning stage and to evaluate it after the initiative has been implemented. Epstein and Rejc recommend that an IT balanced scorecard should not include too many drivers and complex causal relationships between the drivers to help managers focus on key issues. They suggest that a complete IT performance measurement system include no more than 20 measures. Also, it is important to modify the IT balanced scorecard as circumstances change to reflect changed priorities.

Arora (2002) suggests that organizations can effectively implement KM by developing and applying a KM index based on the BSC. The KM index reflects the progress of KM across the four perspectives on the BSC. Although measures of a KM index should be developed by each organization to reflect the organization's unique objectives and KM strategies, Arora identifies some generic measures of KM performance. The generic measures include the amount of codification of tacit knowledge, popularity and importance of the codified repository, usage of the repository items, currency and relevancy of the repository, level of collaborations, new products/practices introduced or problems solved by communities, and intellectual capital. The number of measures in a KM index should be limited to minimize a manager's information overload. To achieve this, the measures identified should be reviewed and prioritized by considering the importance and relevance of each measure. When prioritizing the measures, weight may be assigned to the identified measures. It is desirable for senior managers who have a comprehensive picture of the organization's vision and strategies to be involved in developing a KM index. Kaplan and Norton (1993) point out that a BSC cannot be applied to any business in general or even organizations in the same industry. The same can be said with KM. It is not recommended

to apply the same KM index to two different organizations in the same industry (Arora, 2002). Also, it is important to modify the KM index as the company's strategies change and the maturity of the KM implementation progresses.

Qualitative Case Studies

Given that some types of benefits are not quantifiable, the qualitative case study approach can be valuable in evaluating the performance of KM. The qualitative case study approach seeks to uncover meaning by analyzing rich, non-numerical information in a context of a particular case or multiple cases. Teruya (2004) points out that well-researched and supported qualitative findings are better than quantitative examples whose basis and methods are suspect. The qualitative case study approach can be implemented using a variety of methods including interviews, focus groups, observations, and analyses of existing paper or electronic documents. The interview method refers to a flexible technique that investigates interviewees' expectations and perceptions on a specific issue with a question framework that will yield reliable responses. The focus group method refers to a group depth interview that seeks to gain detailed comments and feedback on a specific issue from a group of people. The focus group method can be conducted both in person and through web-based chat sessions. The observation method is an unobtrusive method that does not intrude upon people participating in a case study by observing them in a field setting. In qualitative case studies, the use of a data collection matrix is recommended as a tool to guide the entire data collection process (Creswell, 1998). The data collection matrix includes information such as where the needed data is and what tools and procedures can be used to collect the data, thus helping ensure that all the data is collected from the right source(s) (O'Connor, 2002).

The analysis of existing paper or electronic documents is also a useful qualitative approach in evaluating KM performance. In KM practices, this method can be applied to analyze communications among CoP members, messages posted on a bulletin board, and questions and answers posted on a Q&A page to identify how KM activities influence the members' job performance. In addition, the qualitative case study approach can be used to explore the impacts of CoP activities on organizational performance.

Success Case Method

Success case method (SCM) also provides an effective framework to measure the impacts of KM implementations on organizational performance. The SCM was originally developed in the human resource development field to evaluate the return on training investments. It was developed by Brinkerhoff (2003) to address the lesser effectiveness of the traditional evaluation approach in reporting success cases in the program evaluation field. Motivated by the need to evaluate training's effect in a broader context of performance management than traditional evaluation models did, the success case method seeks to identify the success in the training-to-performance process as well as the weakness in the process. It is also intended to help understand "what worked, what did not, what worthwhile results have been achieved, and most important, what can be done to get better results from future efforts" (Brinkerhoff, 2005, p.90). The SCM is based on the notion that we can learn how to improve the performance of a program best from those who have been the most and least successful. By applying qualitative methods, the SCM can pinpoint the extremes that quantitative methods cannot.

The SCM aims to illustrate intentionally the best practices that training has produced, but it is important to prove that the implementation of the program has caused the positive performance. By analyzing the cases in which the program did not lead to the positive performance, one can elicit the factors that impede the positive performance of the program. Also, by comparing these factors with the factors that lead to success, adequate strategies to produce better performance can be developed.

The SCM consists of two parts: locating likely success cases and identifying and documenting the success cases. The survey method is often used to locate potential success cases by investigating people's perceptions and behaviors. However, various other methods such as analysis of usage records or performance data can be used to locate success cases. Once the success cases are located, the interview method is employed to learn and document the actual nature of success. Through interviews, a researcher can screen the cases to

find whether they are verifiable and documentable and gather the evidence of the success cases.

One of the strengths of the SCM is that it is capable of identifying lack of success as well. The SCM helps locate the instances of non-success, examine the reasons for non-success, compare the perceptions and behaviors of both the success and non-success groups, and identify the factors leading to the success of the program and the factors impeding the positive results. In this way, the SCM helps improve the performance of the program.

Conclusion

With the wide implementations of KM in organizations, the need for frameworks for evaluating the contributions of KM to an organization's performance has been recognized by executives and KM practitioners. However, there is yet no standardized framework for evaluating KM performance within organizations. Thus, identifying and implementing the evaluation frameworks for KM strategies has become a challenge for practitioners who seek to justify their efforts. In order to aid practitioners to accurately understand and evaluate the contributions of KM implementations, this paper has provided an overview of various evaluation approaches.

Until a standard evaluation framework for KM performance across various organizational contexts and techniques to aid the development of a unique evaluation framework in a particular organizational context are established, academics and practitioners should continue their efforts to develop meaningful evaluation frameworks. It is hoped that this overview will serve as a foundation for further research and development.

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Note

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Libraries on the Agenda! The President-Elect's Planning Session in Seoul

Wolfgang Ratzek

Some General Remarks

From 20–24 August 2006, some 5,000 library and information professionals attended the World Library and Information Congress (WLIC), 72nd IFLA General Conference And Council, in Seoul, South Korea. The Congress offers an excellent opportunity for orientation and networking. Another reason to attend is to meet the members of IFLA Headquarters, such as IFLA President Alex Byrne or President-Elect Claudia Lux, in person. In preparation for her presidency in 2007, Professor Dr. Claudia Lux invited the participants to join her President-Elect's Planning Session on August 22. On 24 August the results of this session were presented before the IFLA Council, and are summarized in this report.

Scoring a Bull's Eye

Claudia Lux will be in office from 2007–2009. She invited participants in WLIC Seoul to share their ideas about the theme and programme for her period of office, *Libraries on the Agenda!* – a title which, at the same time, is suitable for an effective slogan for the programme.

Approximately 80 participants met in a workshop to discuss the theoretical and practical challenges provoked by *Libraries on the Agenda!* The goal for the session was to initialize the programme and to get direct feedback from international experts.

The workshop was divided into two sessions. The first session comprised the presentation of a kick-off paper by Claudia Lux and brainstorming by the participants in work groups. The second comprised presentations of examples of best practice in connection with IFLA activities at

the World Summit on the Information Society (WSIS).

Session One: Some Facts about Claudia Lux's Programme

The aim of the programme, *Libraries on the Agenda!* is “to involve your government and your local decision makers in the concerns of libraries”. This will be achieved by a proactive strategy which will hopefully lead into a campaign for the promotion of libraries on the local, regional, national and international levels. In an interview with the German periodical *Buch und Bibliothek* (11–12/2005, pp. 772ff.) Claudia Lux interpreted her programme as follows: “We and decision makers must be sitting at the same table”.

After a short introduction to the program, Claudia Lux raised the following seven questions:

1. What is our situation of advocacy?
2. What does *Libraries on the Agenda!* mean?
3. Who is the focus of our advocacy?
4. Which are the most suitable topics to deal with?
5. Which methods are successful?
6. Who should be involved?
7. What should our performance be like?

Claudia Lux herself discussed questions 1–4, while questions 5–7 were assigned to the different working groups. The results of both parts of the session are summarized below.

1. What is our Situation of Advocacy?

In all our discussions, librarians have frequently mentioned that libraries are not a focus of political decision making, although they are able to contribute in so many ways to the development of our society.



Claudia Lux

First of all: Is it good or bad to be the focus of political attention?

There cannot be just one answer to this question only, as we have seen many cases where political attention has led to restrictions to libraries' daily work, hindered their endeavours to provide free access to information to their clients and threatened their ways of acquiring all kinds of books with all kind views of the world. As the UNESCO Manifesto for Public Libraries states clearly: "Collections and services should not be subject to any form of ideological, political or religious censorship, nor commercial pressures."

What is to be included in library collections should be down to professional decision making on the part of librarians without the influence of politicians and political pressure groups. This responsibility of librarians is based on their professional training.

To deal with cases in which this is not respected, IFLA has created its own core activity with FAIFE, the office for Free Access to Information and Freedom of Expression, which aims to further the key issue of intellectual freedom by monitoring the state of that freedom in different countries, cooperating with other agencies and responding on IFLA's behalf to violations of the principle.

Against this background Claudia Lux presented an answer to her first question: She thinks "it is good to be a focus of political attention and to be involved in administrative planning processes". And her presidential theme 'Libraries on the Agenda!' aims to emphasize precisely that. She went on: "The present situation of advocacy for libraries is not entirely bad, yet our political role can be strengthened". Referring to the German

sociologist Max Weber, she pointed out that politics consists of three main elements: power, organization and values.

It is assumed that all will agree, when she maintains that librarians might not be overly powerful when it comes to getting their ideas accepted against the influence of others, but we can learn to do something about it.

We all know that we have better possibilities of exerting our influence on politicians and administrations by taking an active part in planning and organizing, considering that we have many creative ideas and a strong group of libraries behind us, which are able to contribute to numerous aspects of society.

Our values are stronger and more convincing than those of many other lobbyists. Librarians stand for a wide range of values such as free access to information, bridging the digital divide, life long learning, stimulating the imagination and creativity of children and young people, fostering inter-cultural dialogue and favouring cultural diversity, supporting the oral tradition and promoting awareness of cultural heritage, etc.

Using the wide range of values and our ability to organize information we should be able to advocate for libraries and to influence political decision makers.

2. What does 'Libraries on the Agenda!' mean?

According to Claudia Lux 'Libraries on the Agenda!' means that we will activate our members and enable them to speak up on every occasion to advocate for libraries. And here IFLA comes into play. IFLA is an international association with librarians from many different countries and different experiences of advocacy. The President-Elect's theme 'Libraries on the Agenda!' aims to collect information on different aspects, adequate methods and successful practices of advocacy from all over the world in order to develop an advocacy handbook for libraries. Your own experience and your ideas shared with librarians from all over the world will be a rich base for the daily advocacy work for 'Libraries on the Agenda!'

Most libraries and their managements have more or less strong connections with the departments of culture, education or science within the political administration of their country, region, or

community. They have more or less good relations with the representatives of the university, school or institute they work for.

This means, for the cultural department and its political representatives, that librarians are standing up in order to lobby for the sake of culture. The best effect will be obtained by working together with other partners like museums, archives, etc. In the educational sector we have to look for partnerships within or with schools, universities and other educational institutions, which are much bigger and will therefore receive more attention from the respective government departments.

Libraries have to put forward arguments to prove why they are as important as other cultural and educational sectors and why they deserve to be supported and receive better financial assistance.

While we know of our influence in the areas of culture and education, where we have already found many possibilities to get on the agenda, we should aim for more. Many politicians tend to stick libraries into a cultural or educational drawer. But compared to other cultural institutions, libraries are involved in far more areas where they can assist in problem solving.

For this reason libraries should be on the agenda of e.g. city planning, because libraries are important for the life in a city and can make a big difference to the urban environment.

For this reason libraries should be on the agenda of migration politics, because libraries can help immigrants with countless issues of information, language training courses, assistance in matters of social support and contact.

For this reason libraries should be on the agenda of economic development, as they can provide extensive information to small and medium business people.

For this reason libraries should be on the agenda of health politics because they can supply all kinds of information on health issues, from addresses of specialized health practitioners to matters of prevention.

There are many more areas at all political levels where libraries can make a difference or just assist further development.

In other words, we should not get stuck in the one or two drawers in which politicians would tend to see us, but we should claim our place in many more drawers and take part in many different activities involving different political departments, even though they might think that they have no responsibility for libraries. The more we facilitate their job with our dedicated library information work, the better our chances to receive their support and their financial help. This is what is meant by 'Libraries on the Agenda!'

3. Who is the Focus of our Advocacy?

The focus of our advocacy includes political decision makers at international, national, regional, and community levels.

On the national level, libraries will address their political representatives in parliament, in the cultural or the educational ministry. However, libraries can also be of interest to other ministerial departments, even though their possible role may not yet be recognized or their value might be thought to be relevant only to issues of culture and education.

Librarians do carry out advocacy work on a regional and community level where, besides their activities in the cultural and education fields, they try to get on to the agendas of regional development, city planning, the information society, etc.

At the university level or in other academic institutions it is important to have libraries on the agenda, too. There they will sometimes be forgotten, as their role in planning is not being considered.

Special libraries within an institution frequently face the same situation; they are not involved in the planning of research projects which they are expected to support.

Claudia Lux emphasized that 'Libraries on the Agenda!' is not only an activity of library directors and library associations. At the same time, librarians are taking part in community life, be it with children in kindergarten and in school or with a home for the aged or a new business centre. They may stand up and talk about the possibilities that libraries have to add to these aspects of community life and why libraries have to be on their agendas.

The level at which our advocacy takes place is important.

There is no international government, but there are international forums and activities where IFLA as an organization has to advocate, like WSIS, UNESCO, WIPO and others.

This is a major task for our IFLA bodies, for the Secretary General, and, in particular, for the President of IFLA. But our success in WSIS is due to the great activities of our Swiss colleagues and Tuula Haavisto whom we engaged to direct our attention to these aspects and keep us continuously up to date. IFLA were hardly able to manage this essential advocacy work without those two pillars of support.

We have learnt a lot from this process; for instance, how and at what stage to best exercise influence on the contents of forthcoming papers, how to be able to speak at the summit's plenum, and how to cooperate with many other NGOs. None of this would have been possible without the support and the active involvement of many national library associations and their delegates.

We know now that we have a dedicated team of convincing personalities, much knowledge of the processes of the summit's organization, solid arguments written in clear language, outstanding examples of libraries' contributions to an information society collected in an impressive international database and partners on different levels supporting all or part of our goals. (More results were shown in the second part of the President Elect's session in Seoul).

4. Which are the Most Suitable Topics to Deal With?

Many libraries have already made their contribution to the task of advocating libraries. These have been collected in a 'success database', which illustrates wonderfully that libraries are an invaluable part of the information society; each report is one more argument for libraries.

Others have written something in favour of academic and public libraries, of libraries in the life long learning process and as partners in the information literacy program. Let us gather all the good arguments to make it easier for librarians to advocate for libraries in all fields. Let us now find out how librarians should behave when they are advocating for their goals.

'Libraries on the Agenda!' means that library associations and librarians are enabled to engage in various activities to make libraries a focus of political decision making.

There are outstanding examples from all over the world and Claudia Lux said that it was her hope that those active librarians would participate in the discussion here and at the next opportunity and pass their knowledge on to others so as to broaden the advocacy skills of our members.



The working groups in session.

Session One: Results from the Working Groups

Ten working groups were formed to share experiences and find answers relating to the following questions:

- Which methods are successful?
- Who should be involved?
- Which arguments are best?

The results are summarized below.

Which Methods are Successful?

Library focus

- Install a public relations department in every library
- Copy the strategies of successful campaigners, e.g. successful fundraising methods or merchandising concepts
- Have a marketing plan
- Transparency – 'What is a library?'
- Library must be seen from the outside and not the inside out

- Enable staff (through training) how to analyze a context and best practices
- Involve the community

Lobbying focus

- Lobbying, i.e. being active before problems arise
- Instead of asking – put something on the table
- Provide opinion leaders/politicians with useful information to support their work
 - on a personal and face-to-face level
 - you have to know the decision maker in person
- Networking in governmental structures
 - being involved in (critical) political issues
 - involvement policy (agenda setting)
 - being part of the political program
 - involve your library when election campaigns are going on
- Develop evidence-based data (to communicate library's impact)

LIS-association focus

- Advocacy handbook for librarians
- Development of performance indicators
- Networking on local, national and international level (joint power structure)
- Identify stakeholders (those with tested interest in libraries)
- Cooperation with archives and museums

Who Should be Involved?

Multiplicator/opinion leader

- Integrate people/celebrities from the outside e.g. pop stars, sportsmen
- Bringing decision-makers in, e.g. politicians in library associations (maybe a problem in opposition parties)
- Hired lobbyists
- User advocacy groups to spread messages
- Staff with full knowledge of mission, goals and objectives

Institutions

- All types of libraries, but there will be a need for leadership
- Library associations
- Community

- Business world, consumer organizations, trade unions, journalists, media, schools, rotary
- Cooperation with archives and museums
- Grassroots (NGOs)
- Library schools



Intense discussion in one of the working groups.

Which Arguments are Best?

Philosophy

- Understanding political problems and the decision making process
- Libraries provides value for your city/community
- The UNESCO Manifesto and IFLA Guidelines
- Libraries are for all, to promote universal access to knowledge
- Stand up for values
- Get other people or institutions to speak for us

Results driven arguments

- Provide politicians with ideas for policy making (agenda setting)
- Show results and not only values i.e. presenting statistical data
- Having strong and united library associations which are actively supported by its members
- Having strategic alliances with the business world, consumer organizations, unions and other institutions

Action

- Show stakeholders what libraries can offer for individual information needs
- Invite all stakeholders and show them what libraries offer
- Address user needs

- Make libraries visible
- Being prepared for discussion/confrontations
 - using statistics
 - storytelling
 - case studies
 - speaking with one voice
- Finding politicians who are librarians
- Networking of library associations
- Getting librarians into governmental positions (librarians become politicians)

Session Two: Examples of Best Practice

After a short break four papers were presented focusing on international best practice in connection with the World Summit on the Information Society:

- Tuula Haavisto (Finland): IFLA-Advocacy at WSIS
- Danielle Mincio (Switzerland): Use Success Database for Advocacy
- Dr. Dusan Katuscak (Slovakia): Library Policy in Slovakia
- Elizabet de Carvalho (Brazil): Successful LIS-policy in Brazil.

The Council Meeting

At the end of the Council meeting on Thursday 24 August in Seoul President-Elect Claudia Lux gave a short report about the brainstorming meeting. She thanked all participants for their active and fruitful participation in this session and reported a few aspects of the results, picking some of the best arguments such as:

- having strong and united library associations which are actively supported by their members and speak with one voice – at least when they are talking to a politician
- provide politicians with ideas for policy making (agenda setting)
- show results and not only values i.e. presenting statistical data and
 - being prepared for discussion/confrontations
 - using statistics
 - storytelling
 - case studies
- to get other people or institutions to speak for us and last but not least

- getting librarians into governmental positions (librarians become politicians).

She thanked all colleagues who are supporting so generously and active IFLA's advocacy work at the World Summit on the Information Society and talked about the good examples of some library associations, how they used the WSIS for their "libraries development".

At the next World Library and Information Congress in Durban, the President-Elect will have a second brainstorming session about 'Libraries on the Agenda!', which will have a focus on the performance of librarians in their advocacy work.

Claudia Lux invites colleagues to write to her about their experiences in advocacy or on any activity or subject they want to add in a connection with her presidential theme 'Libraries on the Agenda!' Write to IFLA Headquarters or lux@zlb.de.

Final Remarks

The brainstorming session in general and the lively discussion made clear that there is a need for advocacy policy focusing on library concerns on a local, regional, national and international level. The results lay the ground for further action at the WLIC in Durban in 2007 where we will discuss "how do we perform – how do politicians think you perform".

The participants in the sessions in Seoul valued the opportunity to share the experience of colleagues from different countries. The comment by Jens Boyer, Head Librarian at the Goethe-Institute in Tokyo, may serve to reflect the feelings of many of those present:

At least important for me as the lectures were the opportunity to meet with colleagues from all over the world. It was very useful for my project work in Japan. The same goes for Claudia Lux' planning and discussion session on August 22. Maybe something comparable could be adopted for the contributions made in the different conference sections.

Note

Report prepared by Prof. Dr. Wolfgang Ratzek, Stuttgart Media University, Wolframstr. 32, DE 70191 Stuttgart, Germany. E-mail : Ratzek@hdm-stuttgart.de

IFLA Policies

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International Librarians Concerned about Manuscripts of Baden-Württemberg

Dr Alex Byrne, President of the International Federation of Library Associations and Institutions (IFLA), expressed dismay when he heard of the planned sale of the manuscripts of the House of Baden by the provincial government of Baden-Württemberg. He said: "The international library and archival community is shocked to hear of the proposal of the Government of Baden-Württemberg to sell all the works acquired before 1872 – some 3,500 out of a total of 4,200 volumes – from the manuscript collection of the Badische Landesbibliothek in Karlsruhe. This incomparable collection includes major treasures taken from monasteries in 1803 and documents a thousand years of commerce and cultural development in Europe. It is not only a treasure for Baden-Württemberg and Germany but part of the world heritage. It must be protected."

The collection includes pracht-manuscripts, an illuminated Book of Hours belonging to Archduke

Christoph I of Baden (1490), the prayer book of Susanna von Brandenburg-Ansbach-Kulmbach, medieval lectionaries from the scriptorium of the monastery at Reichenau, and the Gospel of St. Peter (ca. 1200). The majority of manuscripts come from the libraries of monasteries in the Black Forest, the Upper-Rhine, and Lake Constance and most were acquired when the monastic libraries were expropriated following secularization in 1803. They record the development of religion and society in the region.

It is understood that the sale is intended to finance the preservation of the Salem castle, the last castle of the house of Baden, and its ongoing maintenance. While this is desirable, it must not be done at the expense of this important collection of manuscripts.

The International Federation of Library Associations and Institutions calls on the Government of Baden-Württemberg to abandon this proposal and renew its commitment to the preservation of the history of Baden-Württemberg as documented in the manuscript collection of the Badische Landesbibliothek.

Contacts:

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General. Tel +31 70 31 40 884.
E-mail ifla@ifla.org

World Summit on the Information Society

WSIS Mailing List

The WSIS mailing list has been activated at: <http://infoserv.inist.fr/wwwsympa.fcgi/info/wsisl>. This mailing list is meant for the communication of the IFLA activists interested in WSIS matters. Through the list, we will disseminate and exchange information and share experiences. Welcome to join the list!

President-elect's WSIS Working Group

The Governing Board meeting in Seoul approved the formation of a President-elect's WSIS Working Group, to follow the WSIS Contact Group of IFLA. More information on the WG will be available on the WSIS-list and on IFLA-L.

WSIS Action Lines

The post-WSIS work is organized around eleven Action Lines, which are the WSIS implementation mechanism at the international level. Each Action Line is moderated or facilitated by some UN agency (UNESCO, ITU, UNDP). The whole text of the Geneva Action Plan: <http://www.itu.int/wsiv/docs/geneva/official/poa.html>. The eleven WSIS Action Lines and the IFLA ranking for them are:

- C1. The role of governments and all stakeholders in the promotion of ICTs for development *High priority*

- C2. The information and communication infrastructure *Low priority*
- C3. Access to information and knowledge *Highest priority*
- C4. Capacity building *High priority*
- C5. Building confidence and security in the use of ICTs *Low priority*
- C6. Enabling environment *Low priority*
- C7. ICT Applications (E-government, E-business, E-learning, E-health, E-employment, Environment, E-agriculture, E-science) *Medium priority*, except E-government *High priority*
- C8. Cultural diversity and identity, linguistic diversity and local content *High priority*
- C9. Media *Low priority*
- C10. Ethical dimensions of the Information Society *High priority*
- C11. International and regional cooperation *Low priority*

More information: Tuula Haavisto, WSIS Coordinator of IFLA. E-mail: tuulah@kaapeli.fi

From the Regional Offices

Regional Office for Africa

IFLA's Regional Office for Africa, which has for decades been based at the Library of the University of Dakar, Senegal, will close as of 31 December 2006. Mr Henri Sène – who has been Manager of the Regional Office for 20 years – will

end his term in that office at the same date.

In cooperation with the Africa Section IFLA has started the process to find candidate institutions to host our office for Africa and candidates for the position of Regional Manager. This issue will be all the more important with

our annual World Library and Information Congress in Durban coming up in August 2007.

More information: Sjoerd Koopman, Coordinator of Professional Activities, IFLA Headquarters. E-mail: sjoerd.koopman@ifla.org

Elections

Calls for Nominations

IFLA Headquarters dispatched in October 2006 the following calls for nominations:

- **Nominations for Section Standing Committees:** sent to all IFLA Association and Institutional Members registered for Sections and entitled to nominate candidates to the

Section Standing Committees for the term 2007–2011.

- **Nominations for President-elect and Governing Board members:** sent to all IFLA Association and Institutional Members, Personal Affiliates and Honorary Fellows who are entitled to nominate candidates for the post of President-elect and Governing Board member for the term of office 2007–2009.
- **Nominations for candidates to the IFLA/CLM and IFLA/**

FAIFE Committees: sent to all IFLA Association Members entitled to nominate a candidate to these committees for the term of office 2007–2011.

The deadline for all nominations is 7 February 2007.

More information: Dr Peter Lor, IFLA Secretary General. Tel +31 70 31 40 884. E-mail ifla@ifla.org

Membership

New Members

We bid a warm welcome to the following 26 members who have joined the Federation between 03 August and 03 October 2006. We are happy to announce that the Afghan Parliament Library has joined as an

institutional member, being our first member in Afghanistan.

National Associations

Sociedad Cubana de Ciencias de la Información (SOCICT), Cuba
Ghana Library Association, Ghana

Library and Information Association of Jamaica, Jamaica

Institutions

Afghan Parliament Library, Afghanistan
Centro Memorial Dr. Martin Luther King Jr., Cuba

Centro Nacional de Información de Ciencias Médicas, Cuba
Bibliothèque Municipale de la Ville de Rennes, France
College de France, Service des Bibliothèques, France
Oil and Natural Gas Corporation Limited (ONGC), India
University of Uyo Library, Nigeria
National Library of Nigeria, Nigeria
Qatar University Library, Qatar
University of Missouri – Kansas City, University Libraries – Serials, United States

Family History Library, United States

School Libraries

Scotch College, Australia

Personal Affiliates

Andrew J. Stark, Australia
Ms Dalia M. Naujokaitis, Canada
Mohamed Isahan, Malaysia
Alexander E.H.L. Burgers van der Bogaert, Netherlands

Philip van Zijl, New Zealand
Ms Kanwal Ameen, Pakistan
Ms Dalia M. Gohary, Qatar
Ms Reigneth Nyongwana, South Africa
Ms Karen Kuhn, United States

Student Affiliates

Bello D. Bage, Nigeria
Ms Christine Lanphere, United States

Future IFLA Conferences and Meetings

First International IFLA Presidential Meeting 2007

The first International IFLA Presidential Meeting will be held at the German Foreign Office, Berlin, Werderscher Markt 1, 10117 Berlin, Germany on 18 –19 January 2007.

During the German IFLA presidential term, the German IFLA national committee, supported by the German Foreign Office, BID, BII and the Goethe-Institut, is planning an international conference series entitled 'Free Access to Information'. The three conferences of the series are scheduled for the German IFLA presidential term (2007, 2008, 2009). Librarians and cultural affairs officials from different countries (especially from Eastern-Europe), from Germany as well as IFLA representatives will be discussing possibilities and practices to provide free access to information. German innovative projects as well as examples of cooperative and financial support programs will be presented. Those projects and programs are aimed at promoting the cooperation between libraries, and the coordination between libraries, cultural affairs officials and the political decision makers. The themes of the series of conferences 'Free Access to Information' are guided by the motto

'Libraries on the Agenda!' chosen by the German IFLA president for her term. Simultaneous interpretation (German-English-Russian) will be provided.

Registration and further information

To register please send an email to klauser@bibliotheksverband.de indicating your first and last name, your institution, mailing address, phone number and email address. You will then receive a confirmation email containing payment information including account and routing numbers for bank transfer. Please note that we can only accept registrations if the conference registration fees have been paid on time.

For more information please contact: Hella Klauser, Secretariat/ German IFLA National Committee, Competence Network for Libraries (KNB) at the German Library Association Straße des 17. Juni 114, 10623 Berlin, Germany. Tel. +49-30-39001482. E-mail: klauser@bibliotheksverband.de

WLIC Durban, South Africa, 2007

World Library and Information Congress 2007, 73rd IFLA General

Conference and Council, Durban, South Africa, 19–23 August, 2007. *Theme:* Libraries for the future: progress, development and partnerships.

Exhibition

An international library trade exhibition will be held at the conference venue in conjunction with the conference. For further information and to reserve exhibition space contact: CONGREX HOLLAND BV, PO Box 302, 1000 AH Amsterdam, The Netherlands. Tel: +31 20 50 40 201. Fax: +31 20 50 40 225. E-mail: wlic2007@congreg.nl

Updates of the programme will be published on the website www.ifla.org on a regular basis.

Sessions and Satellite Meetings

Sessions and Satellite Meetings known so far:

Academic and Research Libraries Section. Theme to be announced.

Africa Section. African libraries for the future.

Asia & Oceania Open Session. Information providers coping with disaster in Asia-Oceania.

Continuing Professional Development and Workplace Learning Section. 7th World Conference on Continuing Professional Development & Workplace Learning for the Library and Information Professions. *Theme:* Continuing professional development: pathways to leadership in the library & information world. 14–16 August 2007, Johannesburg – South Africa.

Health and Biosciences Libraries Section. Library frontiers: disasters, emergency preparedness and emerging diseases.

IFLA/FAIFE. Libraries in the struggle against corruption.

Information Literacy Section. Developing the Library into a learning centre, in cooperation with the former IFLA President Kay Raseroka. 14–15 August 2007, Gaborone, Botswana.

Knowledge Management Section. Best practices or lessons learned.

Library and Research Services for Parliaments Section. Parliamentary libraries and research services of the future: partnerships for change.

Library Buildings and Equipment Section. The changing role of libraries as meeting and learning spaces: the third place.

Library Services to Multicultural Populations Section. Innovative multicultural library services for all: literacy, learning and linguistic diversity.

Library Theory and Research Section. The cultural heritage and LIS-research.

Management and Marketing Section. Managing technologies and library automated systems in developing countries.

National Library of Angola. 5th International Meeting of Portuguese Speaking Librarians.

Preservation and Conservation Section. Mold, pests, terrorism and dust: preservation policies and management.

Newspapers Section. African newspapers: access and technology.

Public Libraries, Reading and School Libraries' Sections. Libraries in good health: resources and practices designed to support community development and outreach in health-related issues.

Reading Section with the Libraries for Children and Young Adults Section. Publishing, distributing and promoting children's books in local languages: African experience.

Serials and other Continuing Resources Section. Handling serials and other continuing resources.

Statistics and Evaluation Section. 7th Northumbria International Conference on Performance Measurements in Libraries and Information Services. Quality assurance and outcomes assessment in libraries and information services.

Important Addresses

IFLA/WLIC Conference Secretariat, Congrex Holland BV, PO Box 302, 1000 AH Amsterdam, The Netherlands. Phone: +31 20 50 40 201. Fax: +31 20 50 40 225. E-mail: wlic2007@congrex.nl

IFLA Headquarters, PO Box 95312, 2509 CH The Hague, The Netherlands. Phone: +31 70 314 0884. Fax: +31 70 383 4827. Website: www.ifla.org

National Committee WLIC 2007 Durban, LIASA – Library and Information Association of South Africa, PO Box 3668, Durban 4000, South Africa.

IFLA WLIC 2007 Website

For updated information on the conference please visit the IFLA WLIC 2007 website at <http://www.ifla.org/IV/ifla73/index.htm> IFLA World Library and Information Congress 2007.

WLIC Quebec, 2008

World Library and Information Congress: 74th IFLA General Conference and Council, Québec, Canada, 10–15 August 2008. *Theme:* Libraries without borders: navigating towards global understanding.

Contact Details

IFLA Headquarters and WLIC Conference Secretariat – as above.

Québec City National Committee, WLIC 2008 Québec, Canada, Association pour l'avancement des sciences et des techniques de la documentation (ASTED), 3414, avenue du Parc, bureau 202, Montréal, Québec, Canada, H2X 2H5. Tel: (514) 281–5012. Fax: (514) 281–8219 get. E-mail: info@asted.org. Website: www.asted.org

Further information: <http://www.ifla.org/IV/ifla74/ann2008en.pdf>

74e Congrès mondial des Bibliothèques et de l'Information, Ville de Québec, Québec, Canada, 10–14 août 2008. *Thème:* Bibliothèques sans frontières: naviguer vers une compréhension globale.

Secrétariat de l'IFLA: Casier postal 95312, 2509 CH La Haye, Pays-Bas. Tél.: +31 70 314 0884. Fax: +31 70 383 4827. Courriel: ifla@ifla.org. Site Web: www.ifla.org

Secrétariat du Congrès WLIC, Congrex Holland BV. Tél. : +31 20 5040 201. Fax: +31 20 5040 225. Site Web: www.congrex.com

Comité d'organisation – Québec, WLIC 2008 Québec, Canada, Association pour l'avancement des sciences et des techniques de la documentation (ASTED), 3414, avenue du Parc, bureau 202, Montréal, Québec, Canada, H2X 2H5. Tél. +1 (514) 281 –5012. Fax: (514) 281–8219. Courriel: info@asted.org. Site Web: www.asted.org

Grants and Awards

Guust van Wesemael Literacy Prize – call for applications 2007

Objective

The objective of the Prize is to recognize an achievement in the field of literacy promotion in a developing country. The Prize should preferably be used for follow-up activities such as purchasing targeted collections of appropriate books, but may also be used for other activities such as literacy promotion, training, policy development. The Prize is issued biennially. The focus of the Prize is public library or school library work. Both individuals and library institutions are eligible to apply.

The Prize was established by the IFLA Executive Board in November 1991, to commemorate the late Guust van Wesemael, who was Coordinator of IFLA's Professional Activities from 1979 to 1990 and Deputy Secretary General of IFLA from 1979 to 1991, and his contribution to IFLA's efforts to promote literacy in the developing countries. In 1996 the Prize was re-established under revised conditions.

Applications

The applications must be accompanied by:

- the reasons for application
- a detailed description of the completed project or activity (including a short description of the library, or of the organization and its activities)
- an explanation of how the Prize money would be used
- a realistic budget.

Candidates are also advised to attach a letter of support from their library association.

The Prize of EUR 2,725 will be paid out in 2 instalments: two thirds immediately and one third on submission of a report of how the Prize has been used.

Reporting

Within 6 months after receipt of the Prize, the winner must submit to IFLA HQ an interim report of the use made of the funds, and the second instalment will be paid out. When the project period is finished a final report and a financial statement should be submitted. (The report should be in a form suitable for publication in *IFLA Journal*).

Deadline for applications:
1 March 2007

More information and application form on IFLANET: <http://www.ifla.org/III/grants/grant02.htm>

Dr. Hans-Peter Geh Grant 2007

The Hans-Peter Geh Grant is awarded annually to enable a librarian from the geographic region previously called the Soviet Union, including the Baltic States, to attend an IFLA Seminar or Conference in Germany or elsewhere for becoming acquainted with new international developments in the field of information. The amount of the Grant is EUR 1,135.

The Grant is administered by IFLA Headquarters under the supervision of the Governing Board. The selection is made by a Jury consisting of the Sponsor, Dr. Hans-Peter Geh, and the Secretary General of IFLA.

The applicants should be either IFLA Personal Affiliates or employees of IFLA Members.

The applications must be accompanied by a Statement of

Intent in English, French or German (not more than 3 pages), which should include:

- the reasons for applications specifying the seminar or conference the applicant wishes to attend
- a proposed budget, including financial sources from elsewhere
- a curriculum vitae

Deadline for applications:
1 February 2007.

Application form on IFLANET: <http://www.ifla.org/III/grants/grant03.htm>

Dr. Shawky Salem Conference Grant 2007

The Dr. Shawky Salem Conference Grant is an annual grant established by Dr. Shawky Salem and the International Federation of Library Associations and Institutions (IFLA). The aim of the grant is to enable one expert in library and information science who is a national of an Arab country, to attend the IFLA Conference. Candidates should not have attended an IFLA conference previously.

The grant is to meet up to a maximum of USD 1,900 the cost of travel (economy class air transportation) to and from the host country of the conference, registration, hotel costs and a per diem allowance.

IFLA will act as administrator to the grant and will provide the Secretary of the jury.

Deadline for applications:
1 February 2007.

The selection of a grantee will be made before 1 April 2007 by a jury consisting of members appointed by Dr. Salem and by IFLA. The

grantee will be informed of his or her selection by the Secretary of the Jury in April every year.

Application form on IFLANET at:
<http://www.ifla.org/III/grants/grant04.htm>

World Book Capital Nomination 2009

The Selection Committee for the World Book Capital is calling for nominations for the World Book Capital 2009. The complete applications, duly substantiated, including a cover or support letter from the mayor of the candidate-city and drafted in one of UNESCO's official languages (French, English, Spanish, Russian, Arabic or Chinese), should reach UNESCO no later than Friday 30 March 2007. No application received after this date will be taken into consideration.

The candidate programmes shall be aimed at promoting books and fostering reading during the period between one World Book and Copyright Day and the next (23 April).

To involve all regions[1] of the world in turn, the Selection Committee will avoid the consecutive nomination of cities from the same region. Since the 2008 title was awarded to a European city (Amsterdam), no candidature from the Europe/North America region will be taken into consideration for the 2009 nomination.

The applicants' programme proposals will be examined in the light of the following five criteria:

1. the submission of an activity programme specifically conceived for the World Book Capital City programme and implemented during the city's term as Capital City
2. the degree of municipal, regional, national and international involvement and the impact of the programmes

3. the quantity and quality of one-time or ongoing activities organized by the applicant city in collaboration with national and international professional organizations representing writers, publishers, booksellers and librarians and in full respect of the various players in the book supply chain
4. the quantity and quality of any other noteworthy projects promoting and fostering books and reading
5. the conformity with the principles of freedom of expression, freedom to publish and to distribute information, as stated in the UNESCO Constitution as well as by Articles 19 and 27 of the Universal Declaration of Human Rights and by the Agreement on the Importation of Educational, Scientific and Cultural Materials (Florence Agreement).

By presenting its application each candidate city commits itself, in case of nomination, to:

1. Associate UNESCO, as well as the three professional associations represented in the Selection Committee, in its communication and information campaign, at all levels.
2. Provide UNESCO, which will share it with all members of the Selection Committee, with a final report on the activities implemented during the nomination year. Besides, the City authorities will facilitate possible evaluation audits implemented on UNESCO's demand.

The Selection Committee – operating under the auspices of UNESCO – is made up of one representative of the International Publishers Association (IPA), one representative of the International Booksellers' Federation (IBF), one representative of the International Federation of Library Associations and Institutions (IFLA) and one UNESCO representative, under the chairmanship of the President of IPA. The Committee's task is to choose a World Book Capital

each year, in accordance with 31 C/Resolution 29, adopted by the UNESCO General Conference on 2 November 2001. The first World Book Capital chosen prior to the adoption of 31 C/Resolution 29 was Madrid, in 2001. Subsequent World Book Capital Cities have been Alexandria (2002), New Delhi (2003), and Antwerp (2004). Montreal is the current World Book Capital City and will be succeeded by Turin (2006), Bogotá (2007) and Amsterdam (2008).

Contacts:

UNESCO. Mr Mauro Rosi, Culture, Division of Arts and Cultural Enterprise, 1, rue Miollis, F-75732 Paris Cedex 15, France. Tel.: +33 1 45 68 46 33. Fax: +33 1 45 68 55 95. E-mail: m.rosi@unesco.org

[1] According to its own criteria based on operational needs, UNESCO distinguishes five regions: Africa, Arab States, Asia and the Pacific, Europe and North America, and Latin America and the Caribbean.

Designación de la Capital Mundial del Libro 2009

El comité de selección de la Capital Mundial del Libro abre el plazo para la presentación de candidaturas para la elección de la Capital Mundial del Libro 2009. Los expedientes completos, debidamente razonados y acompañados de una carta de presentación o apoyo del alcalde de la ciudad, deberán redactarse en uno de los idiomas oficiales de la UNESCO (español, francés, inglés, ruso, árabe y chino) y recibirse en la Organización a más tardar el viernes 30 de Marzo de 2007. Ninguna candidatura presentada posteriormente a esta fecha será examinada.

Los programas candidatos tendrán por objetivo promover la difusión del libro y fomentar la lectura durante el periodo comprendido entre la celebración

de dos días mundiales del libro y del derecho de autor (23 de abril).

El comité de selección excluye la nominación consecutiva de dos ciudades de una misma región, con el fin de asegurar la implicación de todas las regiones del mundo de manera equitativa. Puesto que el título fue obtenido por una ciudad europea (Ámsterdam[1]) en 2008, ninguna candidatura de Europa y América del Norte se podrá presentar por el año 2009.

El comité de selección examinará los programas a la luz de cinco criterios:

1. Un programa de actividades especialmente concebido para el periodo de vigencia de la ciudad ganadora que únicamente se lleve a cabo en caso de nombramiento;
2. Nivel de compromiso municipal, nacional e internacional, así como impacto potencial del programa;
3. Cantidad y calidad de las actividades esporádicas o permanentes planificadas en cooperación con las organizaciones profesionales, nacionales e internacionales que representen a autores, editores, libreros y bibliotecarios, y ello con pleno respeto de todos los actores de la cadena del libro;
4. Cantidad y calidad de cualquier otro proyecto significativo que tenga por objeto promover y fomentar el libro y la lectura;
5. Conformidad con los principios de libertad de expresión, y de publicar y difundir la información, enunciados en la Constitución de la UNESCO así como en los artículos 19 y 27 de la Declaración Universal de los Derechos Humanos y en el Acuerdo sobre la Importación de Objetos de Carácter Educativo, Científico o Cultural (Acuerdo de Florencia).

Al presentar su candidatura cada ciudad se compromete, en caso de victoria, a:

1. Incorporar a todos los niveles la UNESCO y las tres asociaciones profesionales del comité de selección en sus campañas de comunicación e información;
2. proporcionar a la UNESCO un informe final de las actividades que efectivamente han tenido lugar durante el año transcurrido. Igualmente, las autoridades competentes de la Capital Mundial del Libro facilitarán el trabajo de un eventual auditor solicitado por la UNESCO.

El comité de selección, que funciona bajo los auspicios de la UNESCO, está integrado por un representante de la Unión Internacional de Editores (UIE), otro de la Federación Internacional de Libreros (FIL) y un tercero de la Federación Internacional de Asociaciones de Bibliotecarios y Bibliotecas (IFLA), así como por un delegado de la UNESCO y se halla bajo la presidencia del Presidente de la UIE. El comité tiene por misión seleccionar una capital mundial del libro cada año en aplicación de la Resolución 31 C/29 aprobada por la Conferencia General de la UNESCO el 2 de noviembre de 2001 (adjunta). La primera Capital Mundial del Libro seleccionada antes de que se aprobara la susodicha resolución fue Madrid, en 2001. Se ha concluido un acuerdo entre los distintos interlocutores para que las siguientes capitales sean Alejandría, en 2002 y Nueva Delhi, en 2003. El comité de selección ha elegido la ciudad de Amberes como Capital Mundial del Libro 2004, la ciudad de Montreal como Capital Mundial del Libro 2005, la de Turín como Capital 2006, la de Bogotá como Capital 2007 y Ámsterdam en 2008.

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[1] Las regiones son cinco (África, Estados árabes, Asia y el pacífico, Europa y América del Norte, América latina y el Caribe) y son determinadas según criterios propios de la UNESCO relacionados con la ejecución de las actividades de la Organización.

Nomination de la Capitale Mondiale du Livre 2009

Le comité de sélection de la capitale mondiale du livre appelle aux candidatures pour la capitale mondiale du livre 2009. Les dossiers de candidature complets, dûment motivés et incluant une lettre de présentation ou d'appui du maire de la ville, doivent parvenir dans l'une des langues de travail de l'UNESCO (anglais, arabe, chinois, espagnol, français et russe) à l'UNESCO au plus tard le vendredi 30 Mars 2007. Aucune candidature ne pourra être reçue au-delà de cette date.

Les programmes de candidature auront pour but de promouvoir le livre et d'encourager la lecture durant la période couverte entre la célébration de deux Journées mondiales du livre et du droit d'auteur (23 avril).

Afin d'assurer l'implication de toutes les régions du monde à tour de rôle, le Comité de sélection exclut l'élection consécutive de deux villes issues d'une même région* ; ainsi, le titre ayant été obtenu par une ville européenne (Amsterdam) en 2008, aucune candidature d'une ville issue de la région Europe et Amérique du Nord ne sera recevable au titre de l'Année 2009.

Les candidatures seront examinées en tenant compte des cinq critères suivants :

1. Soumission d'un programme d'activités spécialement conçu pour la durée de la nomination de la ville gagnante et qui ne serait mis en place qu'en cas de nomination.

2. Niveau de l'implication municipale, régionale, nationale et internationale, et de l'impact des programmes.
 3. Quantité et qualité des activités ponctuelles ou permanentes organisées par la ville candidate en coopération avec les organisations professionnelles nationales et internationales représentant les auteurs, les éditeurs, les libraires et les bibliothécaires, dans le plein respect des multiples acteurs de la chaîne du livre.
 4. Quantité et qualité de tout autre projet significatif visant à promouvoir et à encourager le livre et la lecture.
 5. Conformité avec les principes de liberté d'expression, liberté de publication et de diffusion de l'information, énoncé par l'Acte Constitutif de l'UNESCO ainsi que par les articles 19 et 27 de la Déclaration universelle des Droits de l'Homme et par Accord pour l'importation d'objets de caractère éducatif, scientifique ou culturel (Accord de Florence).
1. à associer l'UNESCO ainsi que les trois associations professionnelles membres du comité à tous les niveaux de sa campagne d'information et communication
 2. à fournir à l'UNESCO, qui le partagera avec l'ensemble du comité de sélection, un rapport final des activités qui ont effectivement eu lieu durant l'année écoulée. De plus, les autorités compétentes de la Capitale mondiale du livre faciliteront le travail d'un éventuel audit demandé par l'UNESCO.

Le comité de sélection, opérant sous l'égide de l'UNESCO, est composé d'un représentant de l'Union Internationale des Editeurs (UIE), d'un représentant de la Fédération Internationale des Libraires (IBF), d'un représentant de la Fédération Internationale des Associations de Bibliothécaires et des Bibliothèques (IFLA) et d'un représentant de l'UNESCO. Le comité a pour vocation de sélectionner une capitale mondiale du livre chaque année, en application de la résolution 31C/29 adoptée par la Conférence générale de l'UNESCO le 2 novembre 2001.

En présentant sa candidature, chaque ville s'engage, en cas de victoire:

La première capitale mondiale du livre sélectionnée avant l'adoption de la résolution 31 C/29 a été Madrid en 2001. Un accord a été conclu entre les différents partenaires pour que les capitales suivantes soient Alexandrie en 2002 et New Delhi en 2003. Le comité de sélection a nommé la ville d'Anvers Capitale mondiale du livre 2004, la ville de Montréal Capitale Mondiale du Livre 2005, la ville de Turin Capitale Mondiale du Livre 2006, la ville de Bogotá Capitale 2007 et celle d'Amsterdam Capitale 2008.

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* Les régions, au nombre de cinq (Afrique, Etats arabes, Asie et Pacifique, Europe et Amérique du Nord, Amérique latine et Caraïbes) sont déterminées selon une définition propre à l'UNESCO, qui se réfère à l'exécution des activités de l'Organisation.

IFLA Publications

IFLA Cataloguing Principles: Steps towards an International Cataloguing Code, 3. Report from the 3rd Meeting of Experts on an International Cataloguing Code, Cairo, Egypt 2004. Edited by Barbara B. Tillett, Khaled Mohamed Reyad and Ana Lupe Cristán. München: Saur, 2006, 197 p. ISBN 3-598-24278-6. (IFLA Series on Bibliographic Control; vol. 29). Price: EUR 78.00 (IFLA Members EUR 58.00)

This book contains the proceedings of the third IFLA Meeting of Experts (IME) on an International Cataloguing Code (ICC), which was held in Cairo, Egypt in December 2005. A large number of international cataloguing experts met

on that occasion to discuss the use of cataloguing rules throughout the Arabic-speaking world. Vol. 29 of the IFLA Series on Bibliographic Control is the latest report in a process towards International Cataloguing Principles that began in 2003 and will continue through 2007. Through the series of meetings represented by each volume the reader will be able to track the development and consultation taking place throughout the different parts of the world that will culminate with the creation of a truly international set of principles to guide the development of cataloguing codes worldwide.

This volume contains information in English and Arabic on the

recommendations of cataloguing experts from countries in the Arabic-speaking Middle East. The April 2006 draft Statement on International Cataloguing Principles included here reflects the votes of agreement from all participants of the IME ICC1 (Europe and Anglo-American), IME ICC2 (Latin America and the Caribbean), and IME ICC3 (Middle East).

IFLA Publications published by: K.G. Saur Verlag, PO Box 701620, 81316 Munich, Germany. Tel: +49-89-76902-300. Fax: +49-89-76902-150/250). E-mail: saur.info@thomson.com. Website: www.saur.de

Other Publications

Libraries and the Asian Tsunami

Rebuilding Knowledge: tsunami-affected libraries in Asia. Helena Loh. Free of charge via e-mail from: helena.loh@gmail.com

This report was prepared by the author during her final semester on the MSIS program at the University of Texas at Austin.

The earthquake off the coast of Sumatra, Indonesia and its subsequent tsunami in the Indian Ocean brought on an unprecedented loss of human life and widespread destruction to countries ranging from Malaysia to the African continent. Libraries and archival holdings were not excluded from this phenomenon with the complete eradication of building structures, library holdings, equipment, furniture, and sometimes, library staff and patrons as well. This report looks at the situation of these libraries and archives a year later, their current standing in damage assessment and reconstruction efforts; steps being taken by governments, local and international communities; and, challenges that

hinder and incentives that mitigate recovery efforts. It also looks at some recommendations in disaster preparedness and preventive measures as well as governmental, social, economic and cultural intervention.

The author will supply electronic copies of the report at no charge via e-mail on condition that, that if it is quoted or used in part or as a whole, the author will be credited with an acknowledgment.

Classical Library Buildings

Classical Library Buildings of the World. Edited by Wu Jianzhong. Shanghai: Shanghai Scientific and Technological Literature Publishing House, 2006. ISBN 7-5439-3005-6/z-1109 (Hardcover, 240*360 mm); USD 60.00 (including USD 20.00 for packing and postage for surface mail).

Library buildings are treasures of our human civilization. From the existing classical library buildings, we can feel and experience the unique artistic styles and architectural

functions presented by these buildings.

To display the architectural styles and features of classical library buildings constructed by various countries and nations, the IFLA Library Buildings and Equipment Section suggested that the Shanghai Library be responsible for the editing and publication of the book *Classical Library Buildings of the World*, based on the book *New Library Buildings of the World*. In August 2005, an editorial board was established, with Dr. Wu Jianzhong as General Editor. The editorial board invited experts from IFLA and China to be its members, and Mr. Stephen Parker as advisor of the board. The editorial board has made a selection of library buildings after a survey of classical library buildings all over the world and has finally decided to include 47 libraries from 22 countries.

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INTERNATIONAL CALENDAR

2007

- January 29–31 2007. [Location not stated]
BOBCATSSS 2007. *Theme:* Marketing of information services.
Further information: Website: www.bobcatsss.org
- February 1–2, 2007. Reykjavik, Iceland.
International Conference on Cataloguing. *Theme:* Back to basics – and flying into the future.
Contact: Organizing committee: E-mail: cat2007@bok.hi.is. Website: <http://www.congress.is/cataloguing2007/>
- February 7–10, 2007. Jadavpur University, Kolkata, India.
Digital Texts in Editable Format with special reference to Indic languages. Conference, 7–8 February 2007. Workshop, 9–10 February 2007.
For more information please contact: Sukanta Chaudhuri at culture@school.jdvu.ac.in or Subha Chakraborty Dasgupta at subha.cd@gmail.com
- February 21–23, 2007. Bangalore, India.
International Conference on Semantic Web and Digital Libraries.
Further information: Conference website: <http://drtc.isibang.ac.in/icsd/>
- March 19–22, 2007. Irbid, Jordan.
1st International Conference on Digital Communications and Computer Applications (DCCA2007).
Further information: Dr. Sameer Batanieh, Conference Chair, DCCA2007, Dean of the Faculty of Computer Science and Information Technology, Jordan University of Science and Technology, PO Box 3030, Irbid 22110, Jordan. E-mail: samir@just.edu.jo or dcca2007@just.edu.jo. Conference website: www.cis.just.edu.jo/dcca2007
- April 3–5, 2007. Santiago, Chile.
International Conference on Newspapers Collection Management. *Theme:* Printed and digital challenges.
Further information: Ximena Cruzat, Director, National Library of Chile. E-mail: ximena.cruzat@bndechile.cl
- abril 14–17, 2007. Buenos Aires, Argentina.
Segundo Congreso Iberoamericano de Bibliotecología.
Contacto: Asociación de Bibliotecarios Graduados de la República Argentina (ABGRA), Paraná 918, 2do. Piso, C1017AAT–Ciudad de Buenos Aires, República Argentina. Tel./Fax: (54–11) 4811–0043/4816–3422. E-mail: iberoamericano@abgra.org.ar. Website: <http://www.abgra.org.ar/>
- May 8–12, 2007. Banff, Canada.
WWW2007: 16th International World Wide Web Conference.
For more information: www2007.info at iw3c2.org
- May 28–30, 2007. São Paulo, Brazil.
9th International Conference on Social Implications of Computers in Developing Countries. *Theme:* Taking stock of e-development.
Further information: ifip94@planetevents.com.br
- July 27–31, 2009. Florianópolis, SC, Brazil.
WCCE 2009: 9th IFIP World Conference on Computers in Education.
- Further information:* E-mail: coordenacao@wcce2009.org
- July 11–13, 2007. Vancouver, British Columbia, Canada.
First International Public Knowledge Project Scholarly Publishing Conference.
Contact: Lynn Copeland. E-mail: copeland@sfu.ca. Tel. +1 (604)291–3265. Fax: +1 (604)291–3023. blog: <http://blogs.lib.sfu.ca/index.php/copeland>.
- August 19–23, 2007. Durban, South Africa.
World Library and Information Congress: 73rd IFLA Council and General Conference. *Theme:* Libraries for the future: progress, development and partnerships.
Further information from the IFLA WLIC 2007 website: <http://www.ifla.org/IV/ifla73/index.htm>
- November 11–17, 2007. Quebec, Canada, 2007.
XLth International Conference of the Round Table on Archives. *Theme:* Cooperation to preserve diversity.
Further information: Conseil international des Archives, 60 rue des Francs-Bourgeois, 75003 PARIS, France. Tel : +33 1 40 27 63 06. Fax: +33 1 42 72 20 65. E-mail: ica@ica.org

2008

- August 10–15, 2008. Québec, Canada.
World Library and Information Congress: 74th IFLA General Conference and Council. *Theme:* Libraries without borders: navigating towards global understanding.
Further information from: <http://www.ifla.org/IV/ifla74/ann2008en.pdf>

SOMMAIRES

Dae-Jung Kim. **Libraries: Prime Movers for the Age of Knowledge and Information. [Les bibliothèques: des moteurs essentiels pour l'ère des connaissances et de l'information.]**

IFLA Journal 32 (2006) No. 4, pp. 278–280

Discours-programme prononcé lors de la cérémonie d'ouverture du Congrès mondial des bibliothèques et de l'information, 72^e Congrès et assemblée générale de l'IFLA, qui s'est tenu du 20 au 24 août 2006 à Séoul en Corée. Évoque le rôle pivot que doivent jouer les bibliothèques pour que l'ère des connaissances et de l'information puisse atteindre ses objectifs. Examine la place des bibliothèques dans les traditions intellectuelles et culturelles coréennes et les efforts faits pour développer ces traditions au 21^e siècle.

Daniel G. Dorner et G.E. Gorman. **Information Literacy Education in Asian Developing Countries: cultural factors affecting curriculum development and programme delivery. [Formation à la culture de l'information dans les pays asiatiques en voie de développement: les facteurs culturels influençant l'élaboration et l'exécution des programmes d'enseignement.]**

IFLA Journal 32 (2006) No. 4, pp. 281–293

Les modèles courants de formation à la culture de l'information (FCI) sont fondés de par leur contexte dans des structures sociales et intellectuelles occidentales. Pour la plupart, ces modèles sont conformes à la taxinomie conçue dans les années 50 par Bloom, qui a été considérée comme pouvant convenir aux sociétés en voie de développement sans tenir compte des contextes dont ces modèles étaient dérivés et dans lesquels ils étaient appliqués. Pour que la FCI soit utilement ancrée dans la trame éducative d'un pays en voie de

développement, il est important de tenir compte d'une série de variables contextuelles ayant une influence sur la façon dont les individus apprennent et pourquoi ils le font. En examinant la FCI à la lumière de la contextualité culturelle, cet article aborde trois questions en rapport avec la FCI dans les pays en voie de développement: comment définissons-nous la culture de l'information dans le contexte d'un pays en voie de développement? Comment déterminer les objectifs éducatifs de la formation à la culture de l'information dans le contexte d'un pays en voie de développement? Comment la sensibilisation culturelle peut-elle améliorer la formation à la culture de l'information?

Leslie Murtha, Eileen Stec et Marilyn Wilt. **Using Assessment as a Tool to Improve Learning: an IFLA Workshop. [L'évaluation utilisée comme un outil pour mieux apprendre: un atelier de l'IFLA.]**

IFLA Journal 32 (2006) No. 4, pp. 294–309

Lors du 69^e Congrès mondial des bibliothèques et de l'information de l'IFLA en 2003 à Berlin, Allemagne, trois bibliothécaires de l'Université Rutgers s'étaient penchées ensemble sur le thème 'L'évaluation utilisée comme un outil pour mieux apprendre'. L'atelier avait pour but d'aider les participants à bien comprendre l'évaluation afin de l'utiliser avec efficacité comme un outil devant permettre de mieux apprendre. Avant et après l'atelier, les animatrices avaient prévu une séance d'évaluation. Pour organiser l'atelier, il fut tenu compte des réactions recueillies lors de l'évaluation avant l'atelier, réactions ayant permis de connaître les circonstances et les expériences individuelles des participants et ayant servi de base aux activités par petits groupes pendant l'atelier. Les évaluations après l'atelier fournirent des suggestions précieuses pour

de futurs programmes. Cet article évoque ce qui fait l'essence de l'atelier dans les termes des animatrices, chacune d'entre elles s'étant consacrée à l'évaluation à un niveau différent. Les trois modes abordés sont ceux professeur/instructeur, élève/étudiant et aspect programmatique/institutionnel.

Denise Rosemary Nicholson. **Intellectual Property – benefit or burden for Africa? [La propriété intellectuelle: bienfait ou fardeau pour l'Afrique?]**

IFLA Journal 32 (2006) No. 4, pp. 310–324

Cet article aborde certaines questions en rapport avec l'accès au savoir en Afrique du Sud et dans d'autres pays africains, ainsi que les répercussions des accords internationaux sur la propriété intellectuelle, en s'intéressant en particulier au copyright. Il montre que la majorité de ces pays ont du mal à satisfaire aux exigences primaires des accords internationaux sur la propriété intellectuelle, alors que les pays développés font subir des pressions à certains d'entre eux pour qu'ils adoptent des mesures encore plus strictes en matière de propriété intellectuelle, en se réclamant de la section des accords sur le libre-échange consacrée aux accords sur la propriété intellectuelle ou 'TRIPS-Plus'. L'article souligne l'impact de certaines clauses TRIPS-Plus sur l'éducation, les bibliothèques et les personnes souffrant de handicaps sensoriels, ainsi que sur la santé publique et le développement en général.

Bukky O. Omotayo. **Women and Conflict in the New Information Age. [Les femmes et les conflits dans la nouvelle ère de l'information.]**

IFLA Journal 32 (2006) No. 4, pp. 325–332

La paix est plus que l'absence de guerres, de violences ou de conflits. Entre 1960 et 1980, l'Afrique a connu 32 guerres ayant

entraîné la perte de millions de vies humaines, cependant que plus d'un million de personnes sont devenues des réfugiés. Ces conflits incessants ainsi que la pauvreté et les maladies menacent tous la stabilité du continent. Il y a de nombreuses théories pour parvenir à la paix, l'une des principales étant de créer des filières plus transparentes pour transmettre les informations entre les individus et les décideurs ; c'est la tâche des bibliothécaires et en particulier des femmes bibliothécaires. Parmi les rôles qui leur reviennent: fournir et communiquer des informations utiles et exactes sur la paix, les mouvements en faveur de la paix et les groupes féministes ; se battre pour la liberté d'accès aux informations ; améliorer les habitudes de lecture des femmes et des enfants ; organiser des expositions et des discussions sur la paix ; assurer l'éducation permanente des femmes et des jeunes filles, etc. Les gouvernements africains doivent permettre aux femmes africaines d'accéder aux informations d'actualité en mettant à leur disposition des bibliothèques fonctionnelles et des connexions Internet afin qu'elles soient correctement informées et puissent participer au débat global et devenir autonomes.

Warwick Cathro. **The Role of a National Library in Supporting Research Information Infrastructure.** [Le rôle d'une bibliothèque nationale pour soutenir une infrastructure d'information sur la recherche.] IFLA Journal 32 (2006) No. 4, pp. 333-339

La Bibliothèque Nationale d'Australie collabore à un programme national ayant pour but d'améliorer l'infrastructure d'information sur la recherche. Ces activités ont permis à la Bibliothèque Nationale d'exprimer son engagement à l'égard de la communauté universitaire. La Bibliothèque Nationale s'est employée à numériser les ressources de recherche, à développer des services intégrés de découverte de services, à participer activement

à trois projets sur l'infrastructure d'information et de recherche, et à travailler avec des partenaires afin de mettre au point des solutions au problème du soutien à apporter aux dépôts d'archives universitaires pour en garantir l'accès sur le long terme. L'article décrit le projet ARROW (Australian Research Repositories Online to the World ou Dépôts australiens d'archives accessibles en ligne pour la recherche), mettant au point une solution pour les dépôts d'archives institutionnels en collaboration avec un fournisseur commercial et le Partenariat australien pour des dépôts d'archives durables (Australian Partnership for Sustainable Repositories ou APSR). Dans ce cadre, la Bibliothèque Nationale aide à concevoir une approche saine pour évaluer le risque d'obsolescence des formats de fichiers, en recommandant une stratégie visant à inclure les métadonnées de préservation dans les dépôts d'archives, et cherchant à stimuler le développement futur de logiciels libres de dépôts d'archives pour utiliser les métadonnées de préservation.

Maria Elena Dorta-Duque. **Governmental Libraries Development: an experience of strategic collaboration in the field of social sciences.** [Le développement des bibliothèques gouvernementales: une expérience de collaboration stratégique dans le domaine des sciences sociales.] IFLA Journal 32 (2006) No. 4, pp. 340-344

En octobre 1995, l'Institut de documentation et d'information scientifique et technologique (IDICT) du Ministère cubain de la science, de la technologie et de l'environnement (CITMA) avait réuni en assemblée diverses bibliothèques et centres d'information gouvernementaux et non gouvernementaux pour traiter de la question de l'information politique, sociale et économique. Le but de l'assemblée était de créer un groupe de travail afin de promouvoir le développement de tels centres dans le domaine des sciences sociales. Ce groupe

serait chargé de favoriser une relation plus étroite entre les centres et le développement de projets en collaboration, de stimuler le partenariat, la coopération et la coordination de tâches spécifiques. Cet article décrit le travail et les réalisations du groupe, le 'Comité de Coordinación de los Centros que manejan Información Política y Social' ou COIPS, ces centres étant maintenant au nombre de 32.

Emma Voskanyan. **Government Information and Centers of Business and Legal Information in Russia.** [Information gouvernementale et centres d'information d'entreprises et d'information légale en Russie.] IFLA Journal 32 (2006) No. 4, pp. 345-355

La Russie est parmi les états disposant des richesses les plus considérables en matière de ressources d'information, aussi bien sur le plan des technologies traditionnelles que des nouvelles technologies. L'état russe, reconnaissant les clauses des documents internationaux consacrés à ces questions, étudie toutes les possibilités devant faciliter à tous l'accès aux informations fondamentales. Parmi les institutions chargées de rassembler, d'organiser et de diffuser les informations, les bibliothèques jouent un rôle significatif. Au début des années 90, des spécialistes russes des réformes légales ont conclu que le principal problème était de choisir où installer les sources autorisées d'informations officielles et de connaissances légales afin d'assurer qu'elles puissent être utilisées par tous. Les experts russes ont estimé que les bibliothèques publiques pouvaient constituer l'une de ces sources. Le système bibliothécaire édifié au cours de la période soviétique s'est avéré tout à la fois stable et flexible, et la communauté bibliothécaire était la plus réceptive de toutes au changement. Cet article décrit comment, en se fondant sur la base solide des bibliothèques, les réformateurs gouvernementaux ont créé en 1993 des modèles spécialisés d'accès à l'information

dans tout le pays –notamment des centres d'information d'entreprises et des centres d'information légale – et évoquent leurs modifications. Ce système fonctionne de façon très efficace.

Wu Shushi. **Cooperation on Local History and the Concept of Network Building between Libraries, Museums and Archives in China.** [Coopération en matière d'histoire locale et concept de création de réseaux reliant bibliothèques, musées et archives en Chine.]

IFLA Journal 32 (2006) No. 4, pp. 356–361

Les livres chinois anciens et les documents sur l'histoire locale sont rassemblés dans des archives, bibliothèques, musées (ABM) et autres institutions académiques

à travers tout le pays. Cet article présente la coopération qui s'est développée entre les ABM en Chine pour conserver et cataloguer les documents. Il décrit brièvement le projet numérique sur l'histoire locale mis en place par la Bibliothèque Nationale de Chine. Enfin, il évoque l'idée d'une coopération entre archives, bibliothèques et musées afin de numériser l'histoire locale.

Jong-Ae Kim. **Measuring the Impacts of Knowledge Management.** [Mesurer les impacts de la gestion des connaissances.]

IFLA Journal 32 (2006) No. 4, pp. 362–367

Avec la popularité croissante de la gestion des connaissances, les spécialistes reconnaissent la nécessité de structures pour

évaluer l'impact de la gestion des connaissances sur les performances des organisations. Malgré la vaste mise en oeuvre de la gestion des connaissances, il n'y a pas encore de structure standardisée pour mesurer les résultats au sein des organisations. Cet article offre une vue d'ensemble des approches permettant d'évaluer l'incidence des mesures de gestion des connaissances mises en place sur les performances des organisations. Il présente des méthodes telles que le retour sur investissement, l'utilisation d'un tableau de bord des performances, les études de cas qualitatives et la méthode d'étude des réussites afin d'aider les spécialistes à identifier et à développer les structures d'évaluation. Il cherche ainsi à servir de base à une recherche et un développement plus poussés.

ZUSAMMENFASSUNGEN

Dae-Jung Kim. **Libraries: Prime Movers for the Age of Knowledge and Information.** [Bibliotheken: Dynamischer Motor für das Wissen und die Informationsgesellschaft.]

IFLA Journal 32 (2006) No. 4, pp. 278–280

Eröffnungsrede zum Weltkongress Bibliothek und Information: 72. IFLA – Generalkonferenz und Ratsversammlung am 20. bis 24. August 2006 in Seoul, Korea. Dieser Beitrag skizziert die Schlüsselrollen, die die Bibliotheken übernehmen müssen, um festzustellen, ob das Wissens- und Informationszeitalter die angestrebten Ziele erreicht oder nicht. Der Autor analysiert die Stellung der Bibliotheken im Rahmen der intellektuellen und kulturellen Traditionen von Korea und beschreibt die Bemühungen zur Weiterentwicklung dieser Traditionen im 21. Jahrhundert.

Daniel G. Dorner und G.E. Gorman. **Information Literacy Education in Asian Developing**

Countries: cultural factors affecting curriculum development and programme delivery. [Ausbildung der Informationskompetenz in den Entwicklungsländern Asiens: kulturelle Faktoren, die die Ausarbeitung der Bildungspläne und der vorgelegten Programme beeinflussen.]

IFLA Journal 32 (2006) No. 4, pp. 281–293

Die derzeit vorherrschenden Modelle zur Ausbildung der Informationskompetenz (Information Literacy Education, ILE) stützen sich, kontextuell gesehen, auf die westlichen Sozial- und Denkstrukturen. Diese Modelle folgen zum Großteil der Taxonomie, die Bloom in den 50er Jahren des letzten Jahrhunderts entwickelt hat. Dabei wurde angenommen, dass diese auch für Entwicklungsländer zutreffend sind, ohne dabei jedoch den Kontext zu berücksichtigen, aus dem sie entstanden sind und in dem sie zum Einsatz gelangen. Wenn die Ausbildung der Informationskompetenz jedoch in sinnvoller Weise

in das Bildungssystem eines Entwicklungslandes integriert werden soll, müssen dabei unbedingt auch die kontextuellen Variablen in Betracht gezogen werden, die bestimmen, wie und aus welchen Gründen die Menschen etwas lernen. Der vorliegende Beitrag befasst sich primär mit der Ausbildung der Informationskompetenz (ILE) und betrachtet diese aus der Perspektive des kulturellen Kontexts. Dabei stellen sich drei Fragen bezüglich der Ausbildung zur Informationskompetenz in den Entwicklungsländern: Wie definieren wir die Informationskompetenz im Kontext der Entwicklungsländer? Wie können wir die Zielsetzungen der Ausbildung der Informationskompetenz im Kontext eines Entwicklungslandes am besten feststellen? In welcher Weise lässt sich die Ausbildung der Informationskompetenz durch eine gewisse Sensibilität der Kultur gegenüber verbessern?

Leslie Murtha, Eileen Stec und Marilyn Wilt. **Using Assessment**

as a Tool to Improve Learning: an IFLA Workshop. [Die Beurteilung als Werkzeug zur Verbesserung des Lernverhaltens: ein IFLA-Workshop.]

IFLA Journal 32 (2006) No. 4, pp. 294–309

Drei Kollegen von den Bibliotheken der Rutgers University haben sich an dem Programm mit dem Titel „Using Assessment as a Tool to Improve Learning“ (Die Beurteilung als Werkzeug zur Verbesserung des Lernverhaltens) anlässlich der 69. IFLA-Generalkonferenz und Ratsversammlung in Berlin in Deutschland im Jahr 2003 beteiligt. Bei diesem Workshop sollten die Teilnehmer das Prinzip der Beurteilung besser verstehen lernen und damit experimentieren, wie man dies effektiv als Werkzeug zur Erleichterung eines besseren Lernverhaltens einsetzt. Die Autoren haben dabei vor beziehungsweise nach dem Workshop jeweils eine Beurteilung durchgeführt. Die Reaktionen aus der Beurteilung vor Beginn des Workshops haben die Konzeption des Workshops bestätigt, eine anfängliche Sensibilisierung für die Kontexte und Erfahrungen der einzelnen Teilnehmer vermittelt und dienten zudem als Grundlage für die im Rahmen des Workshops stattfindenden Kleingruppenprojekte. Die nach dem Workshop durchgeführten Beurteilungen ergaben wertvolle Hinweise für zukünftige Programme. Der Artikel gibt die Essenz des Workshops in den Worten der Vermittler wieder, die jeweils auf unterschiedlicher Ebene an dieser Beurteilung gearbeitet haben. Dabei kamen die drei Dichotomien Lehrer/Ausbilder, Schüler/Lehrling und programmatisch/institutionell zur Sprache.

Denise Rosemary Nicholson. **Intellectual Property – benefit or burden for Africa? [Geistiges Eigentum – ein Vorteil oder eine Belastung für Afrika?]**

IFLA Journal 32 (2006) No. 4, pp. 310–324

Dieser Beitrag unterstreicht einige der Faktoren, die den Zugriff

auf Kenntnisse in Südafrika sowie in weiteren afrikanischen Ländern beeinträchtigen, sowie die Implikationen internationaler Vereinbarungen zum Thema Eigentumsrechte, wobei im Wesentlichen das Urheberrecht im Vordergrund steht. Der Artikel zeigt, dass sich die Mehrzahl dieser Länder sehr darum bemühen, die grundlegenden Forderungen der internationalen Vereinbarungen zum Schutz geistiger Eigentumsrechte zu erfüllen. Einige von ihnen stehen jedoch stark unter Druck von Seiten der Industrieländer, die sie dazu zwingen möchten, noch strengere Systeme zum Schutz geistiger Eigentumsrechte über das Kapitel für geistige Eigentumsrechte oder „TRIPS-Plus“ in den entsprechenden Freihandelsabkommen einzuführen. Das Dokument unterstreicht den Einfluss einiger der TRIPS-Plus – Auflagen zum Thema Bildung, Bibliotheken und Menschen mit Sinnesstörungen, sowie öffentliche Gesundheit und Entwicklung im Allgemeinen.

Bukky O. Omotayo. **Women and Conflict in the New Information Age. [Frauen und Konflikte im neuen Informationszeitalter.]**

IFLA Journal 32 (2006) No. 4, pp. 325–332

Frieden ist mehr als nur die Abwesenheit von Krieg, Gewalt oder militärischen Auseinandersetzungen. Zwischen 1960 und 1980 hat es in Afrika allein 32 Kriege gegeben, wobei Millionen von Menschen umgekommen und mehr als eine Million Menschen zu Flüchtlingen geworden sind. Diese Kämpfe, die noch immer andauern, haben zusammen mit Armut und Krankheiten die Stabilität auf dem Kontinent in Gefahr gebracht. Es gibt viele Konzepte zur Friedensstiftung. Ein wichtiges derartiges Konzept besteht in der Schaffung deutlicherer Kanäle zum Austausch von Informationen zwischen dem einfachen Volk und den politischen Entscheidungsträgern; dies ist die Aufgabe der Bibliothekare, insbesondere der weiblichen unter ihnen. Zu den Rollen der

Bibliothekarinnen zählen die Bereitstellung und Verteilung praktischer und präziser Informationen zum Thema Frieden und Friedensbewegungen sowie Frauengruppen; zum Kampf für den freien Zugriff auf Informationen; zur Verbesserung der Lesefähigkeit bei Frauen und Kindern; zur Organisation von Ausstellungen und Gesprächen über den Frieden; zur Sicherstellung der lebenslangen Aus- und Weiterbildung für Frauen und Mädchen usw. Die Regierungen in Afrika müssen den Zugang zu aktuellen Informationen für afrikanische Frauen gewährleisten und dazu funktionelle Bibliotheken und Internetzugangsmöglichkeiten für sie einrichten, damit sie gut informiert sind, sich an der weltweiten Diskussion beteiligen können und eine gewisse Kontrolle über ihr eigenes Leben erhalten.

Warwick Cathro. **The Role of a National Library in Supporting Research Information Infrastructure. [Die Rolle einer Nationalbibliothek bei der Unterstützung der Infrastruktur für Forschungsinformationen.]**

IFLA Journal 32 (2006) No. 4, pp. 333–339

Die Nationalbibliothek von Australien (National Library of Australia) beteiligt sich an einem landesweiten Programm zur Verbesserung der Infrastruktur für die Forschungsinformationen des Landes. Diese Tätigkeiten gelten der Nationalbibliothek als Schwerpunkt bei ihrem Engagement im Hinblick auf die akademische Gesellschaft. Die Nationalbibliothek hat sich darum bemüht, die Forschungsressourcen zu digitalisieren, einen integrierten Suchservice zu entwickeln und hat sich aktiv an drei Projekten zur Infrastruktur von Forschungsinformationen beteiligt und mit entsprechenden Partnern zusammengearbeitet, um Problemlösungen für den Erhalt akademischer Archive zu entwickeln, die auch langfristig zugänglich sein sollten. Zudem beschreibt dieser Beitrag das ARROW-Projekt

(Australian Research Repositories Online to the World), das eine Lösung für Institutsarchive in Zusammenarbeit mit einem kommerziellen Anbieter und der australischen Partnerschaft für zukunftsfähige Archive (Australian Partnership for Sustainable Repositories, APSR) entwickelt, wobei die Nationalbibliothek dabei behilflich ist, eine vernünftige Strategie zur Einstufung der Obsoleszenzgefahr einzelner Dateiformate zu entwickeln. Zudem erteilt sie Empfehlungen bezüglich einer Strategie zur Ablage von Konservierungs-Metadaten in den Archiven und versucht außerdem, die zukünftige Entwicklung der Open Source – Archivierungssoftware dahingehend zu beeinflussen, dass hierbei auch Metadaten im Zusammenhang mit der Konservierung zur Anwendung gelangen.

Maria Elena Dorta-Duque. **Governmental Libraries Development: an experience of strategic collaboration in the field of social sciences. [Die Entwicklung staatlicher Bibliotheken: Ein Erfahrungsbericht zur strategischen Zusammenarbeit im Bereich der Sozialwissenschaften.]** IFLA Journal 32 (2006) No. 4, pp. 340–344

Das Institut für wissenschaftliche und technologische Dokumentation und Information (Institute of Scientific and Technological Documentation and Information, IDICT) des Ministeriums für Wissenschaft, Technologie und Umweltschutz in Kuba (Ministry of Science, Technology and Environment of Cuba, CITMA) hat im Oktober 1995 eine Tagung für eine Reihe staatlicher wie auch nichtstaatlicher Bibliotheken und Informationszentren einberufen, die politische, soziale und wirtschaftliche Informationen verwalten. Bei dieser Tagung sollte eine Arbeitsgruppe ins Leben gerufen werden, um die Entwicklung solcher Zentren auf dem Fachgebiet der Sozialwissenschaften zu fördern. Die Gruppe wurde damit

betraut, die Beziehungen zwischen den Zentren zu intensivieren, die Entwicklung kollaborativer Projekte zu unterstützen und die Partnerschaft, Kooperation und Koordination spezifischer Aufgaben zu stimulieren. Der vorliegende Beitrag beschreibt die Arbeit und die Leistungen der Gruppe mit dem Namen Comité de Coordinación de los Centros que manejan Información Política y Social, COIPS, zu dem bisher 32 Zentren gehören.

Emma Voskanyan. **Government Information and Centers of Business and Legal Information in Russia. [Staatliche Informationszentren und Zentren für wirtschaftliche und juristische Informationen in Russland.]** IFLA Journal 32 (2006) No. 4, pp. 345–355

Russland zählt zu den Staaten mit der größten Informationsdichte; es besitzt äußerst umfangreiche Informationsressourcen in traditionellen wie auch neuen Technologien. Der russische Staat hat die Vorgaben internationaler Texte über diese Probleme anerkannt und untersucht alle sich bietenden Möglichkeiten, um allen Menschen den Zugang zu den wichtigsten Informationen zu erleichtern. Bei den Institutionen, die für die Sammlung, Organisation und Verbreitung der fraglichen Informationen zuständig sind, spielen die Bibliotheken eine einflussreiche Rolle. Anfang der 90er Jahre des vorigen Jahrhunderts sind russische Justizreformspezialisten zu der Schlussfolgerung gelangt, dass das wesentliche Problem in der Frage liegt, wo sich verbindliche Quellen für offizielle Informationen und juristische Kenntnisse lokalisieren lassen, um sicherzustellen, dass diese der öffentlichen Nutzung zugänglich gemacht werden. Russische Fachleute meinen, dass die öffentlichen Bibliotheken eine solche Quelle darstellen könnten. Das in den Jahren der Sowjetherrschaft erstellte Bibliothekssystem hat sich als stabil und flexibel bewährt, und die Bibliothekare haben sich

allen Neuerungen gegenüber durchaus offen gezeigt. Das Paper beschreibt, in welcher Weise die Staatsreformer im Jahr 1993 entsprechende Spezialmodelle für den Informationszugriff im ganzen Land entwickelt haben, wobei sie sich auf die solide Grundlage der Bibliotheken stützten. Dies beinhaltet beispielsweise Zentren für geschäftliche Informationen, juristische Informationszentren sowie ähnliche Einrichtungen. Dieses System funktioniert sehr effektiv.

Wu Shushi. **Cooperation on Local History and the Concept of Network Building between Libraries, Museums and Archives in China. [Kooperation im Zusammenhang mit der Lokalgeschichte und das Konzept des Network Building zwischen Bibliotheken, Museen und Archiven in China.]** IFLA Journal 32 (2006) No. 4, pp. 356–361

Alte chinesische Bücher und Dokumente zum Thema Lokalgeschichte werden in Archiven, Bibliotheken, Museen (ALM) und anderen akademischen Einrichtungen im ganzen Land aufbewahrt. Der vorliegende Artikel bietet einen Einblick in die Kooperation der chinesischen ALM bei der Konservierung und Katalogisierung der Dokumente. Hinzu kommt eine kurze Beschreibung des Digitalprojekts zur Lokalgeschichte (Digital Local History Project) von der chinesischen Nationalbibliothek (National Library of China). Abschließend stellt dieser Beitrag das Konzept der Kooperation zwischen Archiven, Bibliotheken und Museen bei der Digitalisierung der Lokalgeschichte vor.

Jong-Ae Kim. **Measuring the Impacts of Knowledge Management. [Quantifizierung der Bedeutung der Wissensverwaltung.]** IFLA Journal 32 (2006) No. 4, pp. 362–367

Mit der zunehmenden Popularität der Wissensverwaltung haben die Fachleute die Notwendigkeit

entsprechender Bezugssysteme zur Auswertung der Auswirkungen der Wissensverwaltung auf die Leistung von Organisationen erkannt. Trotz der breiten Implementierung der Wissensverwaltung gibt es noch immer kein standardisiertes Bezugssystem zur Messung der innerhalb von Organisationen

erbrachten Leistungen. Der vorliegende Beitrag bietet einen Überblick über die Verfahren zur Auswertung des Beitrags der Wissensverwaltung auf die Leistung einer Organisation. Dabei werden Methoden wie beispielsweise die Investitionsrentabilität, abgegliche Wertungslisten,

qualitative Fallstudien und die Erfolgsfallmethode vorgestellt. Anhand dieser Parameter können die Fachleute dann die einzelnen Auswertungssysteme identifizieren und entwickeln. Somit soll hiermit eine Grundlage für die weitere Forschung und Entwicklung geschaffen werden.

RESÚMENES

Dae-Jung Kim. **Libraries: Prime Movers for the Age of Knowledge and Information. [Bibliotecas: Las principales promotoras en la era del conocimiento y de la información.]**

IFLA Journal 32 (2006) No. 4, pp. 278–280

Discurso principal del Congreso Mundial de Bibliotecas e Información: 72ª Conferencia y Consejo General de IFLA, 20-24 de agosto, Seúl, Corea, en la Ceremonia de Apertura. Este documento define las funciones principales que deben desempeñar las bibliotecas a la hora de determinar si la era del conocimiento y la información logrará alcanzar los objetivos marcados. También se analiza el lugar que ocupan las bibliotecas en las tradiciones intelectuales y culturales de Corea, así como las iniciativas para lograr que avancen en el siglo XXI.

Daniel G. Dorner y G.E. Gorman. **Information Literacy Education in Asian Developing Countries: cultural factors affecting curriculum development and programme delivery. [Formación en el uso de la información en países en vías de desarrollo del continente asiático: factores culturales que afectan a la elaboración del currículum y al cumplimiento de los programas.]**

IFLA Journal 32 (2006) No. 4, pp. 281–293

Los modelos actuales de formación en el uso de la información (*Information Literacy Education* o ILE, por sus siglas en inglés) se basan contextualmente en

estructuras sociales e intelectuales de Occidente. La mayor parte de dichos modelos siguen la taxonomía que Bloom elaboró en la década de los 50, y que sido adoptada como una metodología adecuada para las sociedades en desarrollo, sin tener en cuenta los contextos de los que emana y en los que se aplica. Para que la formación en el uso de la información se integre de manera provechosa en el tejido educativo de un país en vías de desarrollo, es importante considerar una serie de variables contextuales que afectan a la manera de aprender que tienen las personas. Este documento, que se centra en la formación para el uso de la información desde un contexto cultural, aborda tres cuestiones relativas a esta materia en los países en desarrollo: ¿Cómo definimos la educación para el uso de la información en el contexto de un país en desarrollo? ¿Cómo podemos determinar, de la mejor manera posible, los objetivos educativos de la formación para el uso de la información en el contexto de un país en desarrollo? ¿De qué forma el conocimiento de la cultura puede mejorar la formación para el uso de la información?

Leslie Murtha, Eileen Stec y Marilyn Wilt. **Using Assessment as a Tool to Improve Learning: an IFLA Workshop. [Cómo utilizar la evaluación como una herramienta para mejorar el aprendizaje: un taller de IFLA.]**

IFLA Journal 32 (2006) No. 4, pp. 394–309

Tres profesionales de las Bibliotecas de la Universidad de Rutgers

colaboraron en el programa “Cómo utilizar la evaluación como una herramienta para mejorar el aprendizaje” en la 69ª Conferencia y Consejo General de IFLA que se celebró en Berlín, Alemania, en 2003. El taller se diseñó para ofrecer a los participantes mayor información sobre el proceso de evaluación y sobre la forma de utilizarlo de manera efectiva como herramienta para mejorar el aprendizaje. Las presentadoras estructuraron el taller mediante una evaluación anterior y otra posterior al evento. Las respuestas de la evaluación anterior al taller respaldaron el diseño del mismo, ofrecieron información preliminar de los contextos y experiencias individuales de los participantes, y constituyeron las bases para las actividades con grupos pequeños durante el taller. Las evaluaciones posteriores al taller ofrecieron valiosas recomendaciones para futuros programas. El artículo trasmite la esencia del taller según las palabras de las instructoras, cada una de las cuales se centró en la evaluación a diferentes niveles. Los tres modos debatidos son profesor/instructor, estudiante/alumno y programático/institucional.

Denise Rosemary Nicholson. **Intellectual Property – benefit or burden for Africa?. [Propiedad intelectual: ¿ventaja o carga para África?]**

IFLA Journal 32 (2006) No. 4, pp. 310–324

Este documento resalta algunos de los problemas que dificultan el acceso al conocimiento en

Sudáfrica y otros países africanos, así como las consecuencias de los acuerdos de propiedad intelectual internacionales que se centran, principalmente, en los derechos de autor. En él se demuestra que la mayoría de dichos países tienen problemas para cumplir los requisitos básicos de los acuerdos internacionales en materia de propiedad intelectual, aunque algunos se ven presionados por los países desarrollados para adoptar regímenes aún más estrictos mediante el Capítulo de Propiedad Intelectual (*Intellectual Property Chapter*) o "TRIPS-Plus" en los acuerdos de libre comercio. El documento resalta el impacto de algunas de las disposiciones de TRIPS-Plus sobre educación, bibliotecas y personas con discapacidad sensorial, así como sobre salud pública y avances en general.

Bukky O. Omotayo. **Women and Conflict in the New Information Age. [Las mujeres y los conflictos en la nueva era de la información.]** IFLA Journal 32 (2006) No. 4, pp. 325-332

La paz significa más que la ausencia de guerra, violencia o conflictos. Entre 1960 y 1980, África libró 32 guerras que provocaron la pérdida de millones de vidas y más de un millón de refugiados. Estos conflictos, que aún continúan, junto con la pobreza y las enfermedades, amenazan la estabilidad del continente. Son muchos los conceptos que entran en juego a la hora de crear la paz, y uno de los más importantes es establecer canales mejor definidos para difundir la información entre los ciudadanos de a pie y los políticos. Ésta es la función de los bibliotecarios, y, especialmente, de las mujeres que se dedican a ello. Por tanto, la labor de las bibliotecarias consiste en facilitar y difundir información útil y precisa sobre la paz y los movimientos en esta materia, así como sobre los grupos formados por mujeres; luchar por la libertad de acceso a la información; aumentar el hábito de lectura de las mujeres y los niños;

organizar exposiciones y charlas sobre la paz; asegurar una formación continua para las mujeres y las niñas, etc. Los gobiernos africanos deben asegurar el acceso a la información actualizada por parte de las mujeres africanas mediante la dotación de bibliotecas funcionales y servicios de Internet para que estén debidamente informadas y participen en un debate global, así como para facilitar su desarrollo.

Warwick Cathro. **The Role of a National Library in Supporting Research Information Infrastructure. [La función de una biblioteca nacional para respaldar la infraestructura de información de investigación.]** IFLA Journal 32 (2006) No. 4, pp. 333-339

La Biblioteca Nacional de Australia colabora con un programa del país para mejorar la infraestructura de información de investigación de la nación. Estas actividades han facilitado una mayor orientación a la Biblioteca Nacional para cumplir su compromiso con la comunidad universitaria. La Biblioteca Nacional ha digitalizado los recursos de investigación, ha desarrollado servicios integrados de búsqueda, ha participado activamente en tres proyectos de infraestructura de información de investigación, y ha trabajado con socios para crear soluciones que resuelvan el problema de mantener los archivos de las universidades para que soporten el acceso a largo plazo. El documento también describe el proyecto ARROW (*Australian Research Repositories Online to the World*), que está desarrollando una solución para los archivos institucionales en colaboración con una empresa y *la Australian Partnership for Sustainable Repositories* (Alianza australiana para archivos sostenibles, APRS). En este proyecto, la Biblioteca Nacional ayuda a desarrollar un método consistente para evaluar el riesgo de obsolescencia de los formatos de archivos, y presta asesoramiento para una estrategia que incluya metadatos de respaldo

en los archivos. Asimismo, pretende influir en el futuro desarrollo de software de código abierto para archivos con el fin de utilizar los metadatos de respaldo.

Maria Elena Dorta-Duque. **Governmental Libraries Development: an experience of strategic collaboration in the field of social sciences. [Creación de bibliotecas oficiales: una experiencia de colaboración estratégica en el ámbito de las ciencias sociales.]** IFLA Journal 32 (2006) No. 4, pp. 340-344

El Instituto de Documentación e Información Científica y Tecnológica (IDICT) del Ministerio de Ciencia, Tecnología y Medio Ambiente de Cuba (CITMA) convocó una reunión en octubre de 1995 para bibliotecas y centros de información oficiales y no oficiales que gestionan información política, social y económica. El propósito de la reunión era crear un grupo de trabajo para promover el desarrollo de este tipo de centros en el ámbito de las ciencias sociales. El grupo se encargó de promover una relación más estrecha entre los centros, así como de desarrollar proyectos de colaboración, promover las alianzas, la cooperación y coordinar tareas específicas. Este documento describe el trabajo y los logros del grupo, el Comité de Coordinación de los centros que manejan Información Política y Social, COIPS, que ahora se compone de 32 centros.

Emma Voskanyan. **Government Information and Centers of Business and Legal Information in Russia. [Información oficial y Centros de negocios e información jurídica en Rusia.]** IFLA Journal 32 (2006) No. 4, pp. 345-355

Rusia es uno de los estados con más recursos de información, tanto mediante tecnologías tradicionales como nuevas. El Estado ruso, consciente de las disposiciones de los documentos internacionales

сobre estas cuestiones, estudia todas las posibilidades para que el acceso a la información más importante resulte más fácil para todos. Entre las instituciones encargadas de recopilar, organizar y difundir la información, las bibliotecas desempeñan una función muy importante. A comienzos de la década de los 90, los especialistas rusos en reformas legales llegaron a la conclusión de que el problema principal radica en dónde encontrar las fuentes acreditadas de información oficial, así como los conocimientos jurídicos necesarios para garantizar que pueden ofrecerse para uso público. Los expertos rusos consideran que dichas fuentes podrían ser las bibliotecas públicas rusas. El sistema de bibliotecas, que se creó durante los años del poder soviético, demostró ser uniforme y flexible, y dicha comunidad ha sido la que más receptiva se ha mostrado a los cambios. El documento describe de qué forma los encargados de las reformas gubernamentales se basaron en la sólida estructuras de bibliotecas para crear modelos especializados de acceso a la información por todo el país, como los centros de información empresarial y

los centros de información legal, junto con sus variantes. El sistema funciona con gran eficacia.

Wu Shushi. **Cooperation on Local History and the Concept of Network Building between Libraries, Museums and Archives in China. [Cooperación en historia local y el concepto de creación de redes entre bibliotecas, museos y archivos en China.]** IFLA Journal 32 (2006) No. 4, pp. 356–361

Los libros chinos antiguos y los documentos sobre la historia local se coleccionan en archivos, bibliotecas, museos (ALM), así como en otras instituciones académicas del país. Este documento presenta la cooperación en el ámbito de la conservación de documentos y catalogación que se produce entre ALM en China. Asimismo, describe de manera sucinta el proyecto digital sobre historia local que ha llevado a cabo la Biblioteca Nacional de China. Por último, propone el concepto de cooperación entre archivos, bibliotecas y museos en el ámbito de la digitalización de la historia local.

Jong-Ae Kim. **Measuring the Impacts of Knowledge Management. [Evaluación del impacto de la gestión del conocimiento.]** IFLA Journal 32 (2006) No. 4, pp. 362–367

Con la creciente popularidad de la gestión del conocimiento, los profesionales reconocen la necesidad de disponer de estructuras para evaluar los efectos de esta actividad en el funcionamiento de las organizaciones. A pesar de los grandes avances en la gestión del conocimiento, aún no existe una estructura estandarizada para evaluar los resultados en las organizaciones. Este documento ofrece una visión general de los distintos métodos para evaluar de qué forma los avances en esta materia contribuyen al funcionamiento de las organizaciones. También presenta métodos, como la rentabilidad de la inversión, cuadro de mando integral, casos prácticos cualitativos y casos de éxito para ayudar a los profesionales a identificar y crear las estructuras de evaluación. Por tanto, su objetivo es servir como base para una labor posterior de investigación y desarrollo.

Рефераты статей

Дэе-Юнг Ким. **Libraries: Prime Movers for the Age of Knowledge and Information. [Библиотеки: Движущая сила к эпохе знаний и информации.]** IFLA Journal 32 (2006) No. 4, pp. 278–280

Основной доклад на церемонии открытия Всемирного конгресса по вопросам библиотек и информатизации: 72-ая Генеральная конференция и Совет ИФЛА, 20–24 августа 2006 г., Сеул, Корея. Описывается кардинальная роль, которую должны сыграть библиотеки в определении того, будет ли успешным достижение желаемых результатов в век знаний и информатизации. Рассматривается место библиотек в поддержании интеллектуальных и

культурных традиций Кореи, а также усилия по развитию этих традиций в 21 веке.

Даниэл Г.Дорнер и Г.Е.Горман. **Information Literacy Education in Asian Developing Countries: cultural factors affecting curriculum development and programme delivery. [Обучение информационной грамотности в развивающихся азиатских странах: культурные факторы, влияющие на разработку учебного плана и подачу программы.]** IFLA Journal 32 (2006) No. 4, pp. 281–293

Превалирующие модели обучения информационной грамотности (ОИГ) находят свою контекстуальную основу

в социальных и интеллектуальных структурах Запада. В целом, эти модели соответствуют таксономии, разработанной в 1950-ых Блумом и принятой как подходящей для развивающихся обществ. При этом, однако, не был учтен контекст, из которого они произошли и в котором применяются. Для того чтобы модели ОИГ могли быть разумно интегрированы в образовательную ткань развивающейся страны, важно учитывать ряд контекстных переменных, влияющих на то, как и почему учатся индивидуумы. Рассматривая ОИГ сквозь призму культурного контекста, данная работа делает акцент на трех вопросах, касающихся ОИГ в развивающихся странах: Как определить информационную грамотность в

контексте развивающейся страны? Как лучше определить образовательные цели повышения информационной грамотности в контексте развивающейся страны? Каким образом культурная осведомленность может способствовать повышению информационной грамотности?

Лесли Марта, Эйлин Стек и Мэрилин Уилт. **Using Assessment as a Tool to Improve Learning: an IFLA Workshop.** [Использование оценки в качестве инструмента совершенствования обучения: семинар ИФЛА.] IFLA Journal 32 (2006) No. 4, pp. 294–309

В ходе 69-й Генеральной конференции и Совета ИФЛА в Берлине, Германия в 2003 г. три библиотекаря, представляющих библиотеки Университета Рутгерс, провели совместный семинар по программе «Использование оценки в качестве инструмента совершенствования обучения». Семинар был нацелен на то, чтобы способствовать более глубокому пониманию участниками методики оценки, а также передать опыт по эффективному ее использованию в качестве инструмента, способствующего совершенствованию обучения. Семинару предшествовал этап предварительной оценки, а в завершение была сделана заключительная оценка. Результаты предварительной оценки свидетельствовали о правильности выбранной темы семинара, понимании (в первом приближении) контекста деятельности и опыта отдельных участников. Была также сформирована основа для работы небольших групп в рамках семинара. На этапе заключительной оценки были предложены ценные соображения для организации дальнейших программ. В статье описывается сущность семинара со слов модераторов, каждый из которых специализировался на модели оценки определенного уровня. Обсуждались модели трех уровней: учитель/инструктор, учащийся/студент и программный/институциональный.

Дениз Роузмари Николсон. **Intellectual Property –**

benefit or burden for Africa? [Интеллектуальная собственность – преимущество или бремя для Африки?] IFLA Journal 32 (2006) No. 4, pp. 310–324

В этой работе выделены некоторые аспекты, влияющие на доступ к знаниям в Южной Африке и других африканских странах, а также последствия внедрения международных соглашений в области интеллектуальной собственности, в основном касающихся авторских прав. Констатируется, что большинство этих стран стремится к тому, чтобы отвечать самым основным требованиям соглашений в области интеллектуальной собственности. В то же время некоторые из этих стран подвергаются нажиму со стороны развитых стран, требующих принятия еще более строгих режимов защиты интеллектуальной собственности путем присоединения к разделам по интеллектуальной собственности или ‘TRIPS-Plus’ в Соглашениях о свободной торговле. В работе рассматривается воздействие некоторых положений ‘TRIPS-Plus’ на образование, библиотеки и людей с сенсорной нетрудоспособностью, а также на здравоохранение и развитие в целом.

Баки О. Омотайо. **Women and Conflict in the New Information Age.** [Женщины и конфликт в новую информационную эру.] IFLA Journal 32 (2006) No. 4, pp. 325–332

Мир – это не просто отсутствие войны, насилия или конфликтов. Между 1960 и 1980 годами в Африке разгорелось 32 войны, которые унесли миллионы жизней и сделали более миллиона людей беженцами. Эти конфликты, которые все еще продолжаются, сопровождаются нищетой и болезнями, угрожают стабильности всего континента. Существует много концепций восстановления мира, среди которых одной из основных является создание более свободных каналов распространения информации среди обычных людей и политиков, то есть та роль, которую играют библиотекари, особенно

женщины-библиотекари. Роль женщин-библиотекарей заключается в следующем: предоставление и распространение полезной и достоверной информации на тему мира, движения за мир, деятельности женских групп; борьба за свободу доступа к информации; улучшение читательских навыков женщин и детей; организация выставок и диспутов на тему мира; обеспечение непрерывного образования для женщин и девочек и т.д. Правительства африканских стран должны обеспечить своим женщинам доступ к насущной информации посредством организации действующих библиотек и условий выхода в Интернет для того, чтобы женщины были должным образом информированы и участвовали в глобальных дискуссиях, а также для повышения их социального статуса.

Варвик Катро. **The Role of a National Library in Supporting Research Information Infrastructure.** [Роль национальной библиотеки в поддержке информационной инфраструктуры исследований.] IFLA Journal 32 (2006) No. 4, pp. 333–339

Национальная библиотека Австралии принимает участие в национальной программе по улучшению информационной инфраструктуры исследований в стране. Данная сфера деятельности обеспечила Национальной библиотеке необходимую базу для взаимодействия с университетским сообществом. Национальная библиотека работала над оцифровкой исследовательских ресурсов, разработала интегрированные поисковые сервисы, активно участвовала в трех исследовательских проектах по информационной инфраструктуре, а в сотрудничестве с партнерами работала над решением проблемы создания устойчивых университетских хранилищ, обеспечивающих долговременный доступ. Описывается проект ARROW (Доступ к австралийским исследовательским репозиториям в режиме он-лайн), в рамках которого НБ совместно с коммерческой структурой и Австралийским партнерством по созданию устойчивых репозитариев

(APSR) разрабатывает разумные подходы по оценке рисков устаревания старых форматов; консультирует по вопросам стратегии включения данных о сохранности в метаданные и их использования репозиториями, а также стремится оказывать влияние на будущие разработки открытых программных средств для создания репозитариев, предусматривающих использование данных о сохранности в метаданных.

Мария Елена Дорта-Дьюк. **Governmental Libraries Development: an experience of strategic collaboration in the field of social sciences.** [Развитие правительственных библиотек: опыт стратегического взаимодействия в области общественных наук.] IFLA Journal 32 (2006) No. 4, pp. 340–344

Институт научной и технологической документации и информации (IDICT) Министерства науки, технологий и окружающей среды (СИТМА) Кубы в октябре 1995 года провел совещание представителей правительственных и неправительственных библиотек и центров информации в области политической, социальной и экономической информации. Цель совещания заключалась в создании рабочей группы, содействующей развитию центров такого типа в сфере общественных наук. Группе было поручено наладить более тесные связи между подобными центрами, разработать совместные проекты, стимулирующие партнерство, сотрудничество и координацию специфических задач. В данной работе описывается деятельность и достижения этой группы - the Comité de Coordinación de los Centros que manejan Información Política y Social (COIPS), объединяющей в настоящее время 32 центра.

Эмма Восканян. **Government Information and Centers of Business and Legal Information in Russia.** [Правительственная информация

и центры предоставления деловой и юридической информации в России.] IFLA Journal 32 (2006) No. 4, pp. 345–355

Россия относится к числу наиболее богатых в информационном отношении стран, а ее информационные ресурсы предоставляются как с помощью традиционных, так и новых технологий. Российское правительство, признавая положения международных документов по этим проблемам, делает все возможное для облегчения доступа каждого индивидуума к наиболее важной для него информации. Среди учреждений, отвечающих за сбор, организацию и распространение информации, значительную роль играют библиотеки. В начале 1990-ых российские специалисты по правовой реформе пришли к заключению, что главной проблемой является определение места размещения авторитетных источников официальной информации и правовых знаний, так чтобы сделать их открытыми для общего пользования. Российские эксперты решили, что таким источником могли бы быть российские публичные библиотеки. Библиотечная система, выстроенная во времена советской власти, доказала свою устойчивость и одновременно свою гибкость, а библиотечное сообщество было наиболее восприимчивым к переменам. В работе описывается, каким образом, опираясь на солидную базу библиотек, правительственные реформаторы создали в 1993 году специализированные модели доступа к информации по всей стране, такие, как центры деловой информации, центры юридической информации и их производные. Эта система функционирует очень эффективно.

Бу Шуши. **Cooperation on Local History and the Concept of Network Building between Libraries, Museums and Archives in China.** [Сотрудничество по вопросам местной истории и концепция построения сети между

библиотеками, музеями и архивами в Китае.] IFLA Journal 32 (2006) No. 4, pp. 356–361

Древние китайские книги и местные исторические документы собираются в архивах, библиотеках и музеях (АБМ), а также других академических институтах по всей стране. В данной работе представлено сотрудничество по вопросам консервации и каталогизации, которое осуществляется между китайскими АБМ. В ней кратко описывается Цифровой проект по местной истории, разработанный Национальной библиотекой Китая. В заключение предлагается концепция сотрудничества архивов, библиотек и музеев по оцифровке документов, относящихся к местной истории.

Йонг-Ае Ким. **Measuring the Impacts of Knowledge Management.** [Оценка влияния управления знаниями.] IFLA Journal 32 (2006) No. 4, pp. 362–367

По мере роста популярности темы управления знаниями практики приходят к выводу о необходимости механизма по оценке влияния управления знаниями на деятельность организации. Несмотря на широкое использование управления знаниями, все еще отсутствует стандартный механизм оценки деятельности внутри организаций. В данной работе рассматриваются подходы к оценке позитивных сторон использования управления знаниями для деятельности организации исполнения. В ней рассматриваются такие методики как расчет прибыли на инвестированный капитал, сбалансированный учет результатов, качественный разбор конкретных случаев, а также методика рассмотрения успешного случая, способствующая идентификации и развитию оценочных механизмов практиками. Таким образом, работа может служить основой для дальнейших исследований и разработок.

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IFLA JOURNAL – NOTES FOR CONTRIBUTORS

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The IFLA Journal aims to promote and support the aims and core values of IFLA as the global voice of the library and information profession by providing authoritative coverage and analysis of (a) the activities of IFLA and its various constituent bodies and members, and those of other bodies with similar aims and interests and (b) completed, ongoing and proposed policies, plans and programmes related to the development of library and information services around the world.

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