



# **IFLA Metadata Newsletter**

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The Bibliography Section  
The Cataloguing Section  
The Subject Analysis and Access Section

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### LETTER FROM THE CHAIRS

MIRIAM NAURI (CHAIR OF BIBS SC), MIRIAM SÄFSTRÖM (CHAIR OF CATS SC), MAJA ŽUMER (CHAIR OF SAA SC)

Dear colleagues and friends in metadata,

As you are reading this, winter is coming to its peak as we can look back at an exciting summer and fall. This year's WLIC in Columbus was a success from a metadata perspective, as well as from the perspective of cooperation around the concept of Universal Bibliographic Control. All of our open sessions and meetings drew a large crowd and covered a large range of topics, as well as reports from many different parts of the world. The Bibliography Section's Open Session featured a recorded presentation from our Iranian colleague that had been denied VISA to the US. Once again, we were reminded of the importance of international cooperation, an area in which bibliographers always have been prominent.

In this issue of the Newsletter you will be able to read more about the IFLA WLIC2016, as well as all the call for papers for next year's UBC-related sessions. You will also get an insight into what is going on in the metadata community at large, including the latest developments of the *IFLA Library Reference Model* and news on RDA's progress as a global standard.

We also want to remind you that it is election year next year. Don't miss this opportunity to engage in the work of our sections and make sure that an IFLA-member nominates you before the deadline of February 8<sup>th</sup> for one of our Standing Committees! Or recruit a colleague who you think should be engaged.

With this we want to thank our members and especially our newsletter editors for their hard work, and wish you all a Happy New Metadata Year!



Maja Žumer, Miriam Säfström and Miriam Nauri, Photo: Harriet Aagaard



The Subject Analysis and Access Section



The Bibliography Section



The Cataloguing Section

## IFLA Bibliographic Sections

### GUIDELINES FOR AUTHORITY RECORDS AND REFERENCES (GARR) PREPARING FOR A REVISION

*Barbora Drobíková, in cooperation with Henriette Fog, Vincent Boulet and Elena Escolano*

The aim of this article is to introduce the basic questions that have been raised during the planned revision of *Guidelines for Authority Records and References (GARR)*. Our working group has not yet been officially established, the launch is planned for the next year, but unofficially it already has eight members from around the world and has commenced preparatory steps.

### Previous revision of GARR

IFLA CATS manages many important cataloguing standards, one of them is GARR. GARR replaced GARE (*Guidelines for Authority Records and Entries*) in 2001 and has not been updated since. Due to the age of the document and its position and importance in the cataloguing standards, the IFLA Cataloguing Section agreed on the need for revision this year.

To get a better understanding of GARR let me cite its scope:

“The Guidelines for Authority Records and References specify requirements for the display of information pertaining to authorised headings and references in print, microprint, and machine-readable form in listings of authorities, in

catalogues, in bibliographies, etc. The Guidelines cover authorised headings and references for persons, corporate bodies, and works/expressions, and make provision for the display of reference entries and general explanatory entries, as well as authority entries containing a complete record of information pertaining to the establishment of an authorised heading and the formulation of its associated references.” (GARR, 2001, p. 1).

As is obvious from the definition, the document focuses on authority records and their representation, works with rather traditional concept of authority headings and references. In this second edition (2001) GARR has been updated according to the FRBR model.

### **New revision of GARR**

Over the past 15 years there have been some very significant changes in cataloguing. The standardization of metadata schemas has developed rapidly. We can see changes in standardization for digital libraries and repositories, a progressive transformation of worldwide coverage of cataloguing instructions and standards not only with the advent of the RDA: Resource Description and Access and the development of new exchange formats in the form of linked data. We can see the shift of the paradigm of authority control – from authority records to authority data.

The question is therefore the scope of the new document as such and the definition of its objectives. Another question that immediately arises is the role of the revised document in the newly formed cataloguing environment. An interesting proposal is to have the GARR document serve as a bridge for a wider collaboration with other communities involved in producing and using authority data, within the cultural heritage community (archives, museums) and beyond (public sector, publishers, end-users). GARR would then

serve as a bridge which shows other communities how we understand authority data, in terms of credibility, interoperability, unambiguous identification and the like.

Our preparatory discussions have already revealed some points we would like to follow (inter alia):

- To break away from instructions for authority records display;
- to focus more on the content of authority data, its sharing, interoperability and other roles in the new digital environment;
- to focus on identifiers;
- to take into account evolutions included in FRBR-LRM (to be published), FRBRoo and CIDOD-CRM;
- to respect the significance of the authority database VIAF, the standard ISNI and other important bodies in the field of authority data;
- to include a framework for legacy data and its transformation;
- To introduce the role of trustworthiness and data protection.

### **Conclusion**

Authority control is not only one of the key pillars of the traditional bibliographic control, but it plays a crucial role in the new digital data environment too. GARR belongs deservedly among the major cataloguing standards and guidelines. For a wider understanding of authority control principles, it is necessary to revise its entire conception. We are aware that we face a challenging task, but we believe that the final document will be widely applicable not only in various library communities. We are open to any comments and ideas to our upcoming revision.

### **Resources**

*Guidelines for Authority Records and References* [online]. Second edition. Revised by the IFLA

Working Group on GARE Revision. München: K. G. Saur, 2001. Available from: <http://www.ifla.org/files/assets/hq/publications/series/23.pdf>.

DROBÍKOVÁ, Barbora, FOG, Henriette and Vincent BOULET. *Points to be discussed and revised for the next version of GARR* [an inner text document for IFLA SCAT]. Not publicly available.

### THE STATEMENT OF INTERNATIONAL CATALOGUING PRINCIPLES

The Statement of International Cataloguing Principles 2016, which replaces the 2009 edition, has recently been approved and published.

The new edition takes into consideration new categories of users, the open access environment, the interoperability and the accessibility of data, features of discovery tools and the significant change of user behaviour in general.

The text can be found at <http://www.ifla.org/publications/node/11015>.

At this point in time it is in English only, so translations are most welcome! More information on official IFLA translation policy here: <http://www.ifla.org/node/8723>

### NAMES OF PERSONS :

#### A SERVICE FROM IFLA TO SUPPORT AUTHORITY DATA AROUND THE WORLD

*María Violeta Bertolini, Ricardo Santos and Milena Milanova*

In order to improve access to information through bibliographic data, when choosing the form of a Name of Person (NoP) as an authorized access point, it is important to follow standards that consider the particularities of names according to their origin and local conventions.

According to the International Cataloguing Principles (ICP), established in Paris in 1961 and confirmed in the 2016 edition: "When the name of a person consists of several words, the choice of first word for the authorized access point should follow conventions of the country and language most associated with that person, as found in manifestations or reference sources".

To support cataloguers all over the world in creating authority data for Names of Persons several projects were conducted by the IFLA Cataloguing Section, and in 1963 the provisional edition of Names of Persons was published. The document went through three revisions: 1967, 1977 (supplement 1980), and 1996. Given that the last version was published more than 20 years ago, a new update was much needed.

In 2009 and 2010 new efforts were made from the IFLA Cataloguing Section to update the information provided by countries, and also requesting information to countries not yet included in the previous repertoires. As a result, more than 30 updates were gathered for an eventual new edition. However, the project was stopped in 2010.

A new proposal was launched in WLIC 2014 at Lyon, but with a new vision: making available in the Names of Persons webpage



(<http://www.ifla.org/node/4953>) within the IFLA Cataloguing Section webpage all the files already harvested in 2009 and 2010, future updates and information gathered from more countries. A working group was conformed including María Violeta Bertolini (Argentina), Milena Milanova (Bulgaria) and Ricardo Santos (Spain) to resume the work.

This new edition makes available as individual editable files the information sent by national agencies. The advantages of this approach are that allows easier update and review of the contents, and provides precise access to the information required by cataloguers. Up to now there are 56 files available, sorted alphabetically by the name of the country, followed by the date of the update.

The members of the Working Group reach out to key contacts in national libraries or cataloguing agencies responsible for establishing input conventions for Names of Persons. The team contacts them: to request validation (if there is a file in process), to ask them to provide the information (if there isn't any file) or to ask them whether an update is needed (if the file is already online with a previous date)

In order to facilitate data collection, the group created a standardized template, making further data processing easier to be published in the web. This template and instructions were then published in the NoP web page in English and Spanish, and sent to representatives from national agencies when requesting contributions with the project.

Taking advantage of the expertise available in IFLA, the Working Group started by contacting members of the Cataloguing, Bibliography and Subject Analysis and Access IFLA Sections, as well as members of the Review Groups and Study Groups within these Sections to request their collaboration to update their respective Names of Persons file. In total 21 countries were covered by this approach.

At the same time, the NoP Working Group continued gathering contact information for countries that are either missing a file or require update. The group has been able to find contact information for 44 countries and contacted many of them during the first semester of 2016. Moreover, it continues its work with a Google Drive Excel Spreadsheet including status, updates and contact information for 118 countries.

The main challenge that the Working Group has is to get current and operational contact data from the national agencies, mainly for African or Asian countries, and eventually to get an answer from the identified contacts.

So, if you are reading this, and you work for a national library or cataloguing agency, please get involved! We need your help to update your country's existent information or to contribute with a file, if such doesn't exist.

Please write as soon as possible to one of the members of the Working Group: Maria Violeta Bertolini ([violetbertolini@gmail.com](mailto:violetbertolini@gmail.com)), Ricardo Santos ([ricardo.santos@bne.es](mailto:ricardo.santos@bne.es)) or Milena Milanova ([milanovamilena@yahoo.com](mailto:milanovamilena@yahoo.com)).

Lastly, the team is pleased to report that the RDA Toolkit has replaced the reference to the out of print publication with the link to the Names of Persons web page within the IFLA Cataloguing Section web page. This shows that the NoP service is a reliable resource for cataloguers around the world!

The NoP Working Group will continue during 2017 gathering contact information, sending update requests and contacting countries for which there are no files.

### IFLA GENRE/FORM MEETING 2016

*Georg, Prager and Ricardo Santos Muñoz, co-chairs of the IFLA Genre/Form Working Group*

A discussion was held immediately after the Section on Subject Analysis and Access Standing Committee I Meeting at 5:45 PM on August 13, 2016.

Present: Ulrike Junger, Rehab Ouf, Ricardo Santos (co-chair), George Prager (co-chair)

At the meeting, we mostly discussed how we should proceed with our survey on genre/form practices in national libraries. This survey is available in Google Forms. The group is satisfied with the content of the survey. Do we need a further review period, or is it ready to be sent out now? Should we show the survey first to the Cataloguing and Subject Analysis and Access standing committees before sending it out? There has already been a lengthy period for feedback, so further review by the two standing committees is hopefully not needed at this time. We decided to have all members of the group to fill out the survey, and revise the survey accordingly. (We could then have a short period for feedback from the 2 SCs, before sending out the survey to as many national libraries as possible).

#### Translations:

Rehab suggested that we provide the survey in multiple languages, and she volunteered to translate the survey into Arabic and French. This would require creating a new version of the survey for each language in question, and the language versions would have to be synchronized in Google Forms (or whatever software we used) in order to easily interpret the results. We decided that this might complicate and delay things too much. Additionally, in most of the national libraries there is the linguistic facility in English to answer the survey. We decided just to send out the survey in English. (Perhaps other, simpler surveys, or a follow up of the initial survey could be done in a

multilingual fashion, or just the cover letter accompanying the survey).

After the survey results have been received, we will then have the challenging job of collocating the results and writing up any interesting results in a report. Our goal would be to present the results of our survey at the 2017 IFLA Conference.

After the meeting, we had additional conversations about the suitability of Google Forms for our survey. We decided that it would be worthwhile to examine the functionality of IFLA's survey tool, SurveyGizmo, which is freely available from IFLA Headquarters. We also decided to apply for funding from IFLA for a spring 2016 meeting of the working group, most likely in Madrid, to analyze the results of our survey.

Action Item #1: The co-chairs will procure access to SurveyGizmo.

Status: Done 10/10/16

Action item #2: Ricardo will examine the software, and, if it seems promising, transfer the survey from Google Forms to SurveyGizmo.

Status: Done 10/31/16

Action Item #3: Apply for funding for a spring 2017 meeting of the working group.

Status: Done 10/18/16. George forwarded the request to Maja Zumer, who has included it in the Subject Analysis and Access 2016/2017 Action Plan forwarded to IFLA Headquarters in early November 2016.

Action Item #4: The working group will further revise the survey as needed.

Status: In process as of 11/10/16.

Action item #5: The working group will get a list of contacts at national libraries.

Status: Done 10/18/16. Based on Harriet's initial research, George corresponded with the chair of the National Libraries Section, Guy Berthiaume, and its secretary, Genevieve Clavel-Merrin. The latter

referred us to the list at:

[http://cdnl.info/images/address/2016\\_cdnl\\_addresses\\_list.pdf](http://cdnl.info/images/address/2016_cdnl_addresses_list.pdf)

She also volunteered to send out our survey via the nat-lib list. The working group may want to try both approaches.

Action item #6: The working group will review cover letter to survey and update as needed.

Status: In process as of 11/10/2016. George has done an initial revision of the cover letter, but it has not yet been reviewed by the rest of the working group.

Timeline: November 2016

Action item #7: Members of the group should all fill out the survey. The working group will then reevaluate the survey, and make any desired changes. The group should also take into account a report on earlier surveys done by the Classification and Indexing Section, and previously submitted to working group members.

Status: Not yet done. Timeline: mid-November to end of December 2016

Action item #8: The working group will send out survey with cover letter to as many national libraries and bibliographic agencies as possible.

Timeline: January-February 2017

Action item #9: Evaluation of survey results

Timeline: March-April 2017

Action item #10: Presentation of report on the survey results at IFLA 2017 meeting

Timeline: August 19-25, 2017

### FRBR CONSOLIDATION

*Pat Riva, Concordia University*

Following the world-wide review of the FRBR Library Reference Model draft dated February 2016, the Consolidation Editorial Group (CEG) reviewed all

the submissions received. (For more on the responses, see the article: "World-Wide Review of the FRBR Library Reference Model." *IFLA Metadata Newsletter*, v.2, no.1 (June 2016), p.27-29.) Proposed revisions were incorporated into the draft model definition document and an updated draft was circulated to the FRBR Review Group in July for their consideration in preparation for three meetings at the IFLA WLIC in Columbus, Ohio, USA.

During the RG business meeting on August 14 the CEG reported on the world-wide review and the process. On August 18, Pat Riva presented an overview of the model, with emphasis on the changes proposed since the world-wide review. Finally, the Consolidation Editorial Group, FRBR Review Group members and liaisons, and several observers, met on August 19, 2016 after the 2016 WLIC at the Columbus Metropolitan Library. Review Group members raised their remaining questions and concerns, and considered a number of outstanding issues identified by the CEG. This was a very full but productive day. Decisions were taken on all outstanding points, the follow-through being referred back to the CEG. And last, but not least, a consensus was reached on how to name the new model. It will be known as the *IFLA Library Reference Model*, or IFLA LRM.

Since the IFLA conference, the CEG circulated another draft to the FRBR RG members, incorporating all changes agreed on August 19 and additional feedback from the RG members that was sent by email in September. This draft was again thoroughly reviewed by the RG members, with a final round of feedback being incorporated by the CEG. At this point, the CEG is preparing a clean version of this latest draft, and will circulate it as soon as possible to the Standing Committees of the three metadata sections for their endorsement. Once approved by the sections, the IFLA LRM model definition will be forwarded to the Committee on Standards with a request for official approval as an IFLA standard.

When the model definition document is judged stable, particularly the wording of the definitions of attributes and relationships, the Transition Tables document, which was originally issued in February 2016 to accompany the world-wide review, will be updated as needed.

Much progress has been made towards finalizing the IFLA LRM. The in-depth consultation process, although lengthy, will produce a stronger, carefully considered, final result.

### FRBR / LRM LECTURES IN CHINA

*Ben Gu, National Library of China*

Pat Riva, Associate University Librarian, Collection Services at Concordia University, Montreal, Canada, gave a lecture with the title "IFLA Library Reference Model: Overview" in the National Library of China (NLC), Beijing, China, October 21, 2016. As the chair of the FRBR Consolidation Editorial Group since 2013, Pat Riva spoke about the evolution of the IFLA models, describing the user tasks, modeling decisions, entities, properties, attributes, relationships, aggregates, seriality, and the plans for the next steps. About 120 librarians from NLC and other libraries in Beijing attended the lecture, and they asked many questions about the conception, the details and the future of the IFLA LRM.

Before the lecture in Beijing, Pat Riva gave the plenary session "Resource Discovery in the Internet Age" at the Zhejiang Forum on Public Digital Culture, Hangzhou, Zhejiang Province, October 17-19, 2016, and also talked about the library models in the Semantic Web and the relationships among library, museum and archives models.

Prior to that, the Shanghai Library had invited Pat Riva to present a Workshop on the FRBRoo Model and its Environment, Shanghai, October 14. During

the workshop, Pat Riva introduced FRBRoo and its relationships with FRBR(ER), CIDOC CRM and IFLA LRM to the colleagues from the Shanghai Library and other librarians in Shanghai.

Since the publication of FRBR in 1998, there had been little attention from the Chinese library community until September 2002, when Barbara Tillett visited Beijing and introduced it to colleagues in China. During the middle of the first decade of the 21st century, there were quite a lot of articles on FRBR published in Chinese journals of library science, and there were also some experimental projects for the application of FRBR to Chinese library catalogs. The Chinese version of FRBR (jointly by librarians from Shanghai Jiao Tong University Library, the Shanghai Library, Peking University Library and the National Library of China) was finally released on the IFLA website in 2008. However, FRBRoo and LRM had not received much attention from China. Pat Riva's lectures in Hangzhou, Shanghai and Beijing will therefore have a special importance. I hope more Chinese colleagues will pay attention to the future development of FRBR/LRM.



Ben Gu and Pat Riva



Pat Riva and Ji Luen, organizer of the FRBROO workshop

### DEVELOPING MAPPING MATRICES FRAD – UNIMARC

*Saeedeh Akbari-Daryan, National Library of Iran*

FRBR family models are too abstract and too generic to be a data model, but they can be extremely valuable in helping design OPACs. As FRBR family models are not a data model, for the implementation of these models in OPAC web service, they first have to be "translated" into a data model and a format (IFLA, 2014). FRBR family models lay the foundation for a new generation of OPAC web service that provides better navigation for end users.

It's been years now that the libraries use MARC to make library catalogue machine- readable and to facilitate exchanging data between the libraries.

MARC has caused the increase in search capabilities and retrieval in OPACs by dividing the bibliographical information to the numerous data elements in related fields, while the function of collocation has been forgotten to some extent (Arastoopoor, 2010).

Due to considerable effort and investment of organizations like IFLA, The Library of Congress, OCLC, and national libraries in developing and maintaining of MARC records; it seems quite reasonable to keep and preserve the existing records regarding production and storing of millions of records of MARC format. Also the focus of many research projects all over the world on the mapping between records of MARC with the FRBR models confirms this statement.

Use of capital and human resources, as well as producing several millions of IranMARC (based on UNIMARC) records in National Library of Iran (NLI) software, will make it necessary for NLI to providing the use of standards and other necessary models in order to maintain the existing records. Currently more than two and half millions of bibliographic records, six hundred thousand authority records and three million holding records based on the IRANMARC standard exist in the NLI's software. So the first step for the implementation of the FRBR family in NLI's OPAC is to develop the mapping matrices of the foregoing models with IranMARC. Based on the mapping tables of FRAD attributes to UNIMARC authorities' format fields<sup>1</sup>, the frequency of the compatibility of the attributes of FRAD with the fields of UNIMARC authorities is as following in table 1:

<sup>1</sup> the volume of this mapping tables is 150 pages, so it is not possible to present them here

**Table 1.** The frequency of the compatibility of the attributes of FRAD with the fields of UNIMARC authorities

NO	UNIMARC authorities format	Total attributes (no.)	Attributes with equivalent (no.)	Attributes without equivalent (no.)
1	Personal name	66	65	1
2	Corporate name	51	49	2
3	Family name	48	46	2
4	Title	78	67	11
5	Name/Title	78	63	15
6	Collective Title	78	61	17
7	Name/Collective Title	78	50	28
Total		477	401	76

The compilation of the similar matrices to the aforementioned matrices in the world is generally carried out by a group of experts, but the foregoing matrices were developed through a research. Since they are focused on the mapping of the FRAD attributes to UNIMARC, the function of these matrices are international; therefore the compilation of the mapping matrices is the most important achievement of this research and can be a good experience for the compilation of similar matrices.

After compilation of the mapping matrices of the FRAD and UNIMARC attributes, the mapping matrices had been submitted to Permanent UNIMARC Committee for final approval in order to be available for all UNIMARC users<sup>2</sup>. Having

<sup>2</sup> I have received the following note from Professor Mirna Willer: "I apologize for taking so long to respond - especially so as there is nothing I can comment on or correct in your tables. They are correct tables as I

these matrices is the first stage for the implementation of the FRAD in the OPAC's of countries that use UNIMARC format for storing the authority records.

The obvious fact is that this research showed that the UNIMARC efforts in the application of FRAD terminology in the UNIMARC and editing it in this way have been successful and the next steps should be taken with more confidence.

I hope PUC will find this research useful internationally.

### References:

Akbari-daryan. "Functionality of authority records of IranMARC on the basis of Functional Requirements of Authority Data (FRAD) & Functional Requirements of Subject Authority Data (FRSAD)." PhD diss., Science and Research Branch, Islamic Azad University, 2014

Arastoopoor S. "Evaluation of conformity of IranMARC and FRBR and computerized user viewpoints about the proposed entities in this models." PhD diss., Ferdowsi University of Mashad, 2010.

IFLA. "Frequently Asked Questions". Accessed December 3, 2016 <http://www.ifla.org/node/949>

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understand FRAD and UNIMARC/A... PUC is preparing a new update to be published later this year, you would want perhaps to update your table too. Another issue is the FRBR-LRM which is in the revision period, however, as it is extremely abstract in the present draft version, we still do not know what impact it would have on UNIMARC formats..."(Willer, May 24,2016)

### INFORMAL MEETING OF THE PERMANENT UNIMARC COMMITTEE

2016 August 17, IFLA Congress, Columbus, Ohio, USA

*Jay Weitz, Vice Chair of the PUC*

On 2016 August 17, IFLA's Permanent UNIMARC Committee (PUC) gathered during the IFLA Congress in Columbus, Ohio, USA, an informal meeting. In attendance were Mr. Vincent Boulet (Bibliothèque Nationale de France); Mr. Gordon Dunsire (Independent Consultant, Scotland, and Chair of the RDA Steering Committee); Mr. Massimo Gentili-Tedeschi (Biblioteca Nazionale Braidense and ICCU, Italy); Ms. Irena Kavčič (National and University Library, Slovenia); Ms. Françoise Leresche (Bibliothèque Nationale de France); Mr. Clément Oury (International ISSN Centre, France); Ms. Mélanie Roche (Bibliothèque Nationale de France); and Mr. Jay Weitz (OCLC, USA), PUC Vice Chair and rapporteur. Because of the relatively sparse attendance of PUC members at the IFLA Congress in Columbus, the committee was limited in what it could accomplish, but it was able to carry on some useful discussions.

### Responsibility for Housing UNIMARC and PUC

The IFLA Committee on Standards (CoS) has expressed concerns about the prospect of the National Library of Portugal, Lisbon relinquishing its responsibility for the PUC and the UNIMARC Strategic Programme. Ms. Mirna Willer (University of Zadar, Croatia) has been investigating the willingness of the National and University Library in Zagreb, Croatia to be the next home of UNIMARC. Ms. Barbora Drobiková (Charles University in Prague, Czech Republic) has been looking into the Prague option.

### PUC and the Committee on Standards

Unlike most other IFLA standards, which undergo only periodic review, UNIMARC is under constant review by the PUC. IFLA gave the PUC €5000 in 2006, of which about €2298 remains unspent; in 2014, IFLA gave the PUC €500 for the UNIMARC in RDF Project. These sums are the only funding the PUC has received from IFLA. PUC Chair Ms. Inês Cordeiro (National Library of Portugal) has recommended that the remaining unspent funds be devoted to completing the UNIMARC in RDF Project as quickly as possible. The reorganization of the former Universal Bibliographic Control and International MARC (UBCIM) core activity has left all IFLA standards efforts at a distinct disadvantage, de-emphasizing their vital importance. Mr. Dunsire would like to see the ISBD Review Group, the FRBR Review Group, and the PUC band together with a unified response to the CoS, including concrete suggestions. One fear is that IFLA could move toward such non-IFLA standards as RDA, MARC 21, and BIBFRAME. The Chair of the RDA Board, Mr. Simon Berney-Edwards of CILIP, has expressed relief that the ISBD Review Group has been allowed to start laying the groundwork for the review process and aligning the ISBD with the FRBR Library Reference Model (LRM). Mr. Dunsire suggested that the ISBD can fill the present gap for describing manifestations, as well as help to clarify the record/transcribe ambiguities.

### Protocol Between PUC and RSC

As of April 2016, the RDA Steering Committee (RSC) has a protocol with the Library of Congress Network Development and MARC Standards Office (NDMSO). A protocol needs to be established between the PUC and RSC. The RDA Toolkit needs to include links to IFLA standards such as UNIMARC and ISBD, not merely to MARC 21. Mr. Dunsire would welcome UNIMARC examples to be included in the RDA Toolkit. He encourages the PUC to formally approach him, as the RSC Chair, about establishing such a PUC-RSC protocol based on the ones that already exist for ISBD and FRBR. Such a protocol

would smooth the way for RDA changes within UNIMARC. Furthermore, as RDA works on implementing the LRM over the next two or three years, the PUC could also be kept up-to-date about the changes at the same time as the ISBD RG and FRBR RG.

### Music Vocabularies

The International Association of Music Libraries (IAML) Cataloguing Commission supports harmonization between its own vocabularies and those of the Library of Congress for MARC 21.

The IAML Medium of Performance vocabulary [http://www.urfm.braidense.it/risorse/searchmedium\\_en.php](http://www.urfm.braidense.it/risorse/searchmedium_en.php)

In the IFLA namespace in the Open Metadata Registry (OMR) <http://metadataregistry.org/vocabulary/show/id/380.html>, corresponding to UNIMARC Bibliographic field 146 ([http://www.ifla.org/files/assets/uca/unimarc\\_updates/BIBLIOGRAPHIC/u-b\\_146.pdf](http://www.ifla.org/files/assets/uca/unimarc_updates/BIBLIOGRAPHIC/u-b_146.pdf)).

The Library of Congress Medium of Performance Thesaurus for Music (LCMPT) <http://id.loc.gov/authorities/performanceMediums.html>), corresponding to MARC 21 Bibliographic and Authority fields 382 (<http://www.loc.gov/marc/bibliographic/bd382.html>) and <http://www.loc.gov/marc/authority/ad382.html>).

The Music Library Association (MLA) Vocabularies Subcommittee has created “Best Practices for Using LCMPT” ([http://c.ymcdn.com/sites/www.musiclibraryassoc.org/resource/resmgr/BCC\\_Resources/BPsForUsingLCMPT\\_22022016v2.pdf](http://c.ymcdn.com/sites/www.musiclibraryassoc.org/resource/resmgr/BCC_Resources/BPsForUsingLCMPT_22022016v2.pdf)).

The UNIMARC Musical Forms vocabulary [http://www.urfm.braidense.it/risorse/searchforms\\_en.php](http://www.urfm.braidense.it/risorse/searchforms_en.php) and in the OMR at <http://metadataregistry.org/vocabulary/show/id/444.html>, corresponding to UNIMARC Bibliographic

and Authority fields 128

([http://www.ifla.org/files/assets/uca/unimarc\\_updates/BIBLIOGRAPHIC/u-b\\_128\\_update.pdf](http://www.ifla.org/files/assets/uca/unimarc_updates/BIBLIOGRAPHIC/u-b_128_update.pdf) and [http://www.ifla.org/files/assets/uca/unimarc\\_updates/AUTHORITIES/7\\_u-a\\_128.pdf](http://www.ifla.org/files/assets/uca/unimarc_updates/AUTHORITIES/7_u-a_128.pdf)).

The MLA “Types of Composition for Use in Authorized Access Points for Music” [http://www.musiclibraryassoc.org/mpage/cmc\\_accesspointsrda](http://www.musiclibraryassoc.org/mpage/cmc_accesspointsrda).

The IAML lists are currently under the control of the IAML UNIMARC Sub-Commission, technically managed by Mr. Gentili-Tedeschi. It is certainly preferable to have the specialist communities control their own vocabularies and codes. As of the August 2016 RDA Update, RDA makes no reference to specific vocabularies for either medium of performance or type of composition.

A protocol involving the PUC, IAML, LC, and MLA might be useful to help coordinate all of this. Either mapping between the vocabularies or actually combining the two vocabularies would be valid options. Mr. Dunsire’s preference would be for Linked Data between the LC/MLA and IAML vocabularies to take care of much of the work. Ms. Beth Iseminger (Harvard University), former Chair of MLA’s Cataloging and Metadata Committee (CMC), and Mr. Damian Iseminger (New England Conservatory of Music), Chair of the RDA Music Working Group, have expressed interest in working on this harmonization. The IAML/UNIMARC vocabularies have no definitions but do include some translations, whereas the LC/MLA vocabularies have definitions but no translations. A single, more detailed Medium of Performance vocabulary could also be useful to the museum community.

In addition to any harmonization, there is a need to better account for hybrid instruments (such as the melodica, a mouth-blown reed instrument with a



keyboard), to bring in external sources (such as the DOREMUS Project, see <http://www.iaml.info/congresses/2016-rome> under "Cataloguing Commission"), and to further refine certain instrumental areas where there are many subtypes (such as the numerous kinds of pianos. The Format of Notated Music and Key vocabularies are Western-oriented and might benefit from some of the work done in DOREMUS.

### Upcoming Proposals and Ideas

Rome's National Sound Archives (Istituto Centrale per i Beni Sonori ed Audiovisivi) is likely to be proposing code to accommodate Blu-ray Discs and other audio-visual materials.

The Comité français UNIMARC (CfU) has proposed UNIMARC Bibliographic field 214, an accommodation for the MARC 21 field 264 (Production, Publication, Distribution, Manufacture, and Copyright Notice), which was circulated to the PUC in June 2016. BnF is also working on codes for numismatic materials and guidelines for applying them consistently in UNIMARC, based on work they've done internally. There are also some Expression-related UNIMARC elements that still need to be defined. All of this will probably happen after 2016.

The possibility of establishing some sort of UNIMARC "fast-track" process for such minor things as new codes was discussed, as was the prospect for speeding up the availability of UNIMARC changes, rather than users having to wait for several years. The end of the Saur/De Gruyter "Red Series" may mean that the full texts of UNIMARC Bibliographic and UNIMARC Authority can be made available freely on the Web. That would allow maintenance of the documents on the Web to be done much more quickly. Ms. Joanne Yeomans, IFLA's Professional Support Officer, needs to be asked about this, what form do the documents take (PDF?), how will the IFLA Library handle this? Ms. Leresche will see if the BnF has current English-

language PDFs of the individual fields that were used for work on the French translations.

The PUC also needs to determine who will do the work on harmonizing U/A and U/B with the LRM and how that work will be done. The PUC should look into the possibility of getting funding for this work.

### Upcoming UNIMARC Meeting and Other Activities

Scheduling and location of the 28th meeting of the PUC, probably in March 2017, is in progress and may depend in part on any developments regarding a future home for UNIMARC.

### RDA IN THE WIDER WORLD

#### IFLA SATELLITE MEETING 11 AUGUST 2016

*Unni Knutsen, Oslo University Library/IFLA Cataloguing Section*



Unni Knutsen. Photo: Harriet Aagaard

A high number of satellite meetings took place in connection to the IFLA WLIC in Columbus, Ohio, USA this year. One of the satellite meetings I attended was a one-day meeting on RDA sponsored by the IFLA Cataloguing Section, the IFLA Serials and Other Continuing Resources Section, and co-

sponsored by the RDA Steering Committee (RSC) & RDA Board. The meeting took place on August 11 2016. The meeting was generously hosted by OCLC at their Conference Center in Dublin, Ohio.



OCLC Conference center. Photo: Unni Knutsen

According to the announcement, the following issues were on the agenda:

- What impact does this international vision have on the governance structure of RDA?
- How has RDA been received outside Anglophone communities?
- FRBR- Library Reference Model and RDA
- How does RDA reach out to other communities?
- How does RDA treat specific areas such as serials and continuing resources, music, and audio-visual materials?

The first presenter, Simon Berney-Edwards dealt with the international vision for RDA and why it has been meaningful to move away from the Anglo-American perspective. The RDA Board describes RDA as a package of data elements, guidelines, and instructions for creating library and cultural heritage resource metadata that are well formed according to international models for user-focussed linked data applications. The goal is to create rich, compatible and sharable data for discoverability.

According to the RDA strategic plan 2015-2020 the aim is to turn RDA into **the** global standard. To achieve this goal, the governance structure and the business model will have to be modified and RDA must generally develop into a more internationally recognised standard.

One important step in moving in the direction of a truly international standard is having six regional representatives on the RDA Board: from Africa, Latin America and the Caribbean, North America, Asia, Europe and Oceania. RDA colleagues from Africa, Asia and Latin America and the Caribbean are encouraged to make contact.

The forming of a Translations Working Group and the emphasis on working groups for special materials and special areas in RDA is another way of encouraging international participation. By adding more online infrastructure, the RDA Board and the RDA Steering Committee will further enhance the level of discussion, collaborative working, submissions of changes and ease feedback and voting.

Another way of supporting multilingualism is the RDA Registry, well presented by Jon Phipps and Diane Hillmann. Ahava Cohen (Israel) demonstrated how working with RDA in a multilingual cataloguing environment is quite complicated.

The two presentations from Latin America (Ageo Garcia B. and Angela Quiroz Ubiema) clearly show that there is a move to RDA in this region. The change agents are academic libraries. Through regional cataloguing meetings and NACO/RDA training workshops in Mexico, Peru and Chile, the establishment of national RDA interest groups, the translation of RDA including training materials into Spanish and the dissemination of webinars and in-house training, the interest for RDA is increasing. A survey among academic and research institutions in

the Spanish-speaking parts of Latin America shows that only 19 % of the libraries have not adopted RDA by May 2016. The level of full adoption was 11 % at the time of the survey, but is expected to reach 46 % by the end of 2017.

RDA is at this point in time aligned with the conceptual models FRBR and FRAD. Pat Riva, chair of the FRBR Consolidation Editorial Group, unveiled some of the features of the evolving FRBR Library Reference Model (FRBR-LRM). RDA will have to change somewhat when the underlying model changes. Both Pat Riva and later on Gordon Dunsire were pretty clear that this will not be a major issue for RDA, but new entities will have to be added and attributes transformed into relationships in order to improve retrieval.

Two presentations gave examples of collaborating with other cultural heritage institutions. Marja-Liisa Seppälä explained how Finnish memory organizations have developed a RDA-based data model, showed some of the differences between the sectors in the creation of metadata and the strive to create a common ground. Christian Aliverti and Renate Behrens touched on some common problems in their presentation of cooperation within the cultural heritage sector in German-speaking countries. Can RDA be truly helpful in describing hair-locks, letters, dossiers, objects, paintings, buildings or natural monuments? One of their findings was that authority data have high value and can be a common starting point when cooperating with other cultural heritage institutions. We are encouraged to see RDA not as a Swiss army knife, but rather as a nexus for cultural heritage and a linking point for cultural institutions.



By Jonas Bergsten [Public domain], via Wikimedia Commons

At one point, the audience split up into groups for a discussion of RDA in relation with serials and continuing resources, music and audio-visual materials. Judging from the summing up, important issues were brought up, e.g. the need to focus on articles, not only the description of serials, how well FRBR is consistent with serials, the boundaries of work in music materials, how to deal with versions, creators, adjustment to fit aspects of ethnic music etc.

All in all, RDA development is driven by, as Gordon Dunsire (chair of the RDA Steering Committee) put it, a strategy to develop RDA communities internationally, also within the cultural heritage community and a focus on linked data and semantic web. The consolidation of the FRBR models in the FRBR-LRM model will create a need to adjust RDA and there is also a need to re-organize the toolkit structure and functionality. Expect changes to take place in the coming years as well!

The presentations can be found at: <http://www.oclc.org/events/2016/ifla-2016.en.html>

### 2016 RDA STEERING COMMITTEE MEETING: HIGHLIGHTS

*Judy Kuhagen (RSC Secretary) and Linda Barnhart (RSC Secretary Elect)*

The first meeting of the RDA Steering Committee (RSC) was held from November 7-11, 2016, at the Deutsche Nationalbibliothek in Frankfurt am Main, Germany. The RSC thanks the DNB for its excellent hospitality and facilities in hosting this meeting.

More detail about the meeting may be found in the [News and Announcements](#) section of the [RSC website](#), including the Outcomes document, the agenda, and (later) the minutes.

The RSC is comprised of nine members: Gordon Dunsire (Chair), Renate Behrens (Europe), Kathy Glennan (American Library Association), Kate James (RDA Examples Editor), Ebe Kartus (Australian Committee on Cataloging), William Leonard (Canadian Committee on Cataloging), David Reser (Library of Congress), Judy Kuhagen (RSC Secretary), and Linda Barnhart (RSC Secretary-Elect). James Hennelly, Managing Editor of RDA Toolkit, and Simon Berney-Edwards, Chair of the RDA Board, also attended the meeting ex-officio, as did Working Group chairs Deborah Fritz and Damian Iseminger. Working Group chair Francis Lapka participated “virtually” via the Internet. This meeting was the first for Secretary-Elect Linda Barnhart and the last for Judy Kuhagen in the role of RSC Secretary; this position will transition in April 2017. The RSC is delighted to announce that Judy Kuhagen will stay on as a consultant to the group.

Twenty-three observers from eleven countries (Canada, Croatia, Czech Republic, Finland, France, Germany, Iceland, Italy, Portugal, Slovenia, and United States) attended public sessions of the meeting.

Four certificates of appreciation were awarded, to Renate Behrens, Cinzia Bufalino, and Edith Röschlau, in gratitude for their excellent work in

arranging the meeting, and to Judy Kuhagen for her outstanding service to the committee.

### IFLA Library Reference Model

The RSC agreed to adopt the draft IFLA Library Reference Model (LRM) with the goal of developing the RDA text by the April 2018 release of a restructured RDA Toolkit. Although the LRM will not be finally approved and published by IFLA until 2017, the RSC decided to proceed because it is aware through its protocol with the IFLA FRBR Review Group that the issues still under discussion are minor.

RDA will add at least five new entities from the LRM: Agent, Collective Agent, Nomen, Place, and Time-span. RDA will retain its current entities, elements, and relationship designators as refinements of the high-level LRM entities and relationships. The only major change for current RDA entities is to remove fictitious characters and non-human entities from the scope of Person; however, RDA will develop accommodation for these data as names within the context of the LRM Nomen entity.

The consolidation of the FRBR family of models allows the RSC to develop RDA to fill gaps and resolve inconsistencies in its treatment of information resources. For example, the RSC Aggregates Working Group will proceed to develop the draft guidance and instructions on aggregations.

### RDA Toolkit Restructure and Redesign (3R) Project

James Hennelly (ALA Publishing), on behalf of the RDA Board and Co-Publishers, began working on the 3R Project earlier in 2016; an overview is available on the [Toolkit website](#). In addition to providing greater flexibility in the display of instructions,

improved functionality for editors and translators, and better tracking of revision history, the 3R Project will also bring the site into compliance with current accessibility standards.

The RSC discussed the restructuring of the RDA content itself. The RSC established general principles for this work: to generalize existing instructions where possible, to clarify the transcription and recording of data in the context of the 4-fold path (unstructured description, structured description which includes authorized access points, identifiers, and linked data URIs), and to expand RDA's scope to cultural heritage communities. Although current instructions may be relocated within the RDA content, any development of those instructions will have minimal impact on current practice. A mapping will be provided from the current RDA instructions to the relocated RDA instructions.

### **Schedule for 2017 and 2018**

The work and time needed to adopt the LRM and to carry out the 3R Project require some changes in the schedule for updates to the RDA Toolkit. The plan calls for three releases in 2017 (February, April, and August), and three releases in 2018 (April, August, and October).

This work schedule for both ALA Publishing and the RSC means that no proposals or discussion papers should be submitted in 2017 by RSC communities or working groups. RDA Toolkit must remain stable between April 2017 and the release of the new design to carry out data conversion, implement the new Toolkit infrastructure, and allow translations to synchronize. Communities and working groups will continue to identify areas for future revision, including proposals deferred in the past.

The RSC recognized that the usual consultation process with RSC communities and other groups is not suitable for the initial development of the LRM in RDA during the 3R Project. It cannot easily fit

within the project schedule, and requires communities to have expert knowledge of the LRM. At the same time the communities in the new RDA regions are developing communication policies and procedures as part of transition to the new governance structure. Instead, RSC will send frequent announcements about the status of generalized content, revised content, and new content. RSC members will also develop channels of communication for keeping their communities informed and for getting general feedback about the changes.

### **Liaison and collaboration with other standards groups**

An important part of the RSC meeting was a focus on discussions with liaisons from other standards groups and possible collaboration among the groups that are considering the impact of the LRM.

Representatives from the following standards groups reported on the activities of their groups: IFLA UNIMARC Strategic Programme (Maria Inês Cordeiro, Chair), IFLA FRBR Review Group (Barbora Drobíková, member), IFLA PRESSoo Review Group (Gordon Dunsire, member), IFLA ISBD Review Group (Massimo Gentili-Tedeschi, Chair), FRBR Consolidation Editorial Group (Pat Riva, Chair, attending virtually), and the ISSN International Centre (Christian Schütz).

Also attending as an observer was Axel Ermert (Institut für Museumsforschung, Staatliche Museen zu Berlin) who reported to the meeting on the updated edition of the international standard *ISO 5127-2016 Foundation and vocabulary of information and documentation*. He invited RSC and others to consider submitting RDA terms/definitions to the ongoing development of the ISO standard.

The RSC will collaborate with the other standards groups in the following areas:

- notification of changes due to adoption of LRM
- development and publication of new elements resulting from refinement of the higher-level LRM elements
- review of current alignments and notification of changes
- use of current multi-standard communication channels (e.g., *IFLA Metadata Newsletter*) and development of new opportunities to share information between groups and with the users of the standards.

### Governance review and RDA strategy

The RSC continued its discussions with the Chair of the RDA Board about the next steps in the transition to the new governance model by 2019. The RDA strategy continues to focus on expansion to international, cultural heritage, and linked data communities. This meeting in Frankfurt was the first for the recently-organized Europe community, represented by Renate Behrens of the Deutsche Nationalbibliothek. Planning for the development of the North America and Oceania RDA regions is underway.

### Discussion of proposals and discussion papers

The RSC discussed 23 proposals and discussion papers plus responses from communities and other groups. The documents represented a wide diversity of topics and included 14 proposals or discussion papers from five of the ten RSC working groups.

A table listing the RSC decisions/actions for all proposals and discussion papers is included in the Outcomes document posted in the [News and Announcements](#) section of the [RSC website](#). The text of approved proposals will be issued as “Sec final” documents posted on the RSC website during February and March 2017. Changes to RDA

approved by the RSC will appear in the April 2017 update of RDA Toolkit.

### RSC working group

The RSC received annual reports from its [ten working groups](#). During the meeting, the RSC reviewed unfinished tasks and assigned new tasks to these working groups. The RSC will establish a working group on archives early in 2017. The RSC encourages interested colleagues from Europe and elsewhere to volunteer for membership on any of the working groups; persons should contact Gordon Dunsire or the Chair of the relevant working group.

### Liaisons to other groups

Continuing RSC liaisons are:

- Alan Danskin to ONIX
- Gordon Dunsire to the IFLA FRBR Review Group, the ISSN International Centre, the IFLA Permanent UNIMARC Committee, the Library of Congress Network Development and MARC Standards Office, and the IFLA PRESSoo Review Group
- Renate Behrens to the IFLA ISBD Review Group.

The protocols between the RSC and the FRBR Review Group, the ISBD Review Group, the ISSN International Centre, and the Library of Congress Network Development and MARC Standards Office continue in operation. The RSC will continue to seek collaboration with similar groups responsible for the development and maintenance of bibliographic and other standards related to RDA.

The RSC is confident that it can meet the challenges of this transition period for RDA Toolkit, the RDA guidance and instructions, RDA Reference, and RSC governance structures with the support of the RDA communities, RSC working groups, and related standards communities. The RSC looks forward as

well to working with IFLA groups and colleagues on areas of mutual interest.

### RSC meetings in 2017

The RSC agreed to meet twice in 2017 due to the amount and nature of activity anticipated during the next year. RSC will meet in Chicago in May 2017 to focus on LRM integration, the addition of new text based on LRM content, and Toolkit restructuring. The RSC proposes to meet in Europe in October or November 2017, creating an opportunity to meet with translators to discuss the impact on RDA translations as well as discussing progress on the project. The RSC hopes to associate each meeting with an outreach event such as a seminar, workshop, or Jane-athon.

### RDA'S PROGRESS AS A GLOBAL STANDARD

*James Hennelly, Managing Editor of RDA Toolkit*

The RDA Board, in 2015, reaffirmed its goal that RDA should become an international standard. Progress toward internationalization can be assessed by examining three key areas of RDA and RDA Toolkit: usage, translations, and governance. The recently announced RDA Toolkit Restructure and Redesign Project will also advance the goal of internationalization by resulting in a Toolkit that is more responsive to translators and non-English speakers.

### Usage of RDA Toolkit

In 2015, the toolkit had over 2,800 subscribers who purchased access for nearly 9000 users in 64 countries across six continents. When the subscribers from the countries responsible for RDA's successor (AACR) are subtracted, the

numbers for the other 60 nations include nearly 750 subscribers and just over 2,500 users. That international group represents about 26% of subscribers and 28% of RDA Toolkit users.

### Translations

Interest in translating RDA has been steady since its online publication in 2010. Four different categories of translation exist:

- RDA Toolkit translations: full translations that appear in the Toolkit. Available now are the English version and translations in Finnish, French, German, Italian, and Spanish. Catalan and Norwegian translations will be added in 2017.
- Print translations: translations that are not included in RDA Toolkit but are available for purchase in a print format. Available now are the English version and translations in French, Mandarin, and Spanish.
- Translations "for study": translations by institutions for the study and evaluation of RDA for potential use. These translations are not available for public distribution.
- RDA Reference translations: translations of RDA elements and vocabularies, their definitions, and scope notes. These translations are added to the [RDA Registry](#), where they can be used by developers to build online public access catalogs, integrated library systems, and other systems with language-specific interfaces. Available now are the English version and translations in Arabic, Chinese, Dutch, Finnish, German, Hebrew, Italian, and Spanish, in varying states of completion. RDA Reference translations into Catalan, Danish, Greek, Norwegian, Slovak, Swedish, Ukrainian, and Vietnamese will be added in coming months.

For some language groups there are several benefits of providing RDA Reference translations:

- It is a cost-effective option for any country that is part of a smaller language community and has library staff members proficient in other languages that are represented in RDA Toolkit. This option allows vocabulary terms and relationship designators displayed in public catalogs to be in the language of the users of those catalogs.
- The translations are easy to maintain, using simple spreadsheets to export the data in English and the translation language, and re-import the data after the translation is updated offline.
- The data are freely available under an open license and can be used in training and operational services. This allows element labels and definitions to be displayed in the language of the cataloger in data input and display forms. The RDA data editor RIMMF now allows users to choose the interface and display language, using data from RDA Reference.
- RDA Toolkit can host only a single translation of any language. The RDA Registry can include dialect-specific translations, such as Mexican Spanish or Québécois French.

Any community interested in implementing RDA will want to explore translation options. Details on [RDA translation guidelines and practices](#) are available on the Toolkit website.

### Governance

During the development of RDA and until 2012, the RDA Board and the RDA Steering Committee (RSC) had members from national libraries and professional associations in Australia, Canada, the United Kingdom, and the United States. In 2012, a representative from Die Deutsche

Nationalbibliothek joined the RDA Board and the RSC.

In 2014, the RDA Board began a [governance review](#) that determined that a more global approach to RDA management and development was needed and that board and RSC representation must be more diverse. The new structure calls for representation from each of the six global regions recognized by the United Nations: Africa, Asia, Europe, North America, Oceania, and South America.

The Europe community was organized in 2016. Planning for the development of the North America and Oceania RDA regions is underway.

At the RSC level, each region will establish collaborative groups similar to the European RDA Interest Group. These groups will meet online and in person to discuss RDA issues and put forward proposals to the RSC. At the RDA Board level, regional representation will contribute to the strategic planning and regional outreach. A full description of the [new governance model](#) is available on the Board's website.

### RDA Toolkit Restructure and Redesign Project (3-R Project)

In 2017 and 2018, RDA and RDA Toolkit will undergo a data restructure and a website redesign to improve work processes and enhance user experience. One of the focal points of [the 3R project](#) is to improve translation tools and processes that expedite the publication of revisions to translated versions of RDA. By improving the value and currency of RDA Toolkit for non-English speakers, providing new tools to allow for easier exchange of RDA information, and expanding the involvement and input of groups from around the globe, the RDA Board, RDA's co-publishers, and RSC know that RDA



will be a standard that is both accessible to users worldwide and responsive to the needs of a wide range of language and cultural communities.

### RDA IN SWEDEN

*Harriet Aagaard, National Library of Sweden*



Katarina Synnermark and Olle Johansson: 1<sup>st</sup> lecture on RDA. Photo: Harriet Aagaard

The Swedish RDA-project started working in 2014 and is now almost finished. From 2017 RDA activities will be part of everyday work. In November cataloguers at the National Library of Sweden received training in RDA and have now started cataloguing according to RDA. Other libraries in Sweden will get training in the beginning of 2017.

Sweden decided not to translate RDA into Swedish – only the glossary is translated. Swedish statements about how to use RDA will be published in the RDA-toolkit in 2017, but is published locally to start with.

The training courses consisted of six lectures starting with knowledge of FRBR.

### RDA IN SPAIN

*National Library of Spain, press release*

The National Library of Spain has decided to adopt the standard RDA: Resource Description and Access for cataloging their collections. According to our initial estimates and the implementation schedule prepared, from 1 January 2017 to mid-2018 we will be working on the development of training materials and the training of our staff. Eventually, the National Library of Spain will begin to create bibliographic and authority records according to RDA from January 1, 2019.

For its part, the Fine Arts, Cultural Assets, Archives and Libraries Executive Management of the Spanish Ministry of Education, Culture and Sport, through the General Office of Library Coordination, has among its functions the coordination and promotion of library cooperation, as well as the supply of technical services and advice on library matters. Under these functions it believes that the adoption of RDA by the BNE is fundamental to facilitate the transition to this standard by the rest of Spanish libraries. In this respect, it will support this project, promoting collaboration with other public administrations under the Spanish Library Cooperation Council. The aim of this collaboration will facilitate training for all professionals and access to the necessary convergence with the international community that has already adopted RDA.

### METADATA NEWS FROM CANADA

*Pat Riva, Concordia University*

#### **Canadian Linked Data Summit in Montreal**

On 24-26 October 2016, the first Canadian Linked Data Summit was held in Montreal, Quebec. The Summit was organized by the Canadian Linked Data Initiative (CLDI), a cooperative project initiated in June 2015 by the five largest university libraries in

Canada: University of Toronto, McGill University, Université de Montréal, University of Alberta, and the University of British Columbia, together with partners at Libraries and Archives Canada (LAC) and Bibliothèque et Archives nationales du Québec (BANQ). The first day of the Summit was a seminar, with presentations on linked data projects and initiatives from Canada, France and the United States. The following days were devoted to the CDLI working groups. The Seminar presentation slides: <https://www.mcgill.ca/clds/program>

### RDA Seminar in Ottawa

On 28 April 2016, Library and Archives Canada hosted a Thematic Seminar on *Resource Description and Access / Séminaire thématique sur Ressources : description et accès*, in Gatineau, Québec. The meeting was organized to take advantage of the presence of the RDA Board members in Ottawa. Five speakers spoke to an audience of librarians from LAC, governmental, academic and public libraries from Ottawa, Gatineau, Toronto, and Montréal. Three of the speakers were present for the RDA Board meeting. The programme explored aspects of RDA's evolution including the revision of the RDA Toolkit technology, the changes in the RDA governance structure, and the role RDA data will play in the semantic web. The audience also benefited from an explanation of the FRBR Library Reference Model. The presentation slides can be found at:

<https://rdaincanada.wikispaces.com/presentations>

### RDA Governance

The Canadian Library Association was one of the three Co-Publishers of RDA. The Canadian Library Association was dissolved in June 2016, and a new federation of library associations was incorporated on May 16, 2016: Canadian Federation of Library Associations = Fédération canadienne des associations de bibliothèques. [CFLA](#) is "the national, bilingual voice of Canada's library associations." It is

intentionally different in scope and purpose from its predecessor, the Canadian Library Association, but it will also continue certain roles and responsibilities. The Canadian metadata community was very pleased when CFLA announced that it would assume responsibility as one of the RDA Co-Publishers and appoint its representative to the RDA Board. Chris Oliver was appointed as CFLA representative. The RDA Board was also very supportive in facilitating the transition.

### Resource Description and Access in French

The French translation of RDA, first published in 2013, had a major update as of the October 2016 release of the RDA Toolkit. The French translation is now current to the April 2016 English-language release. This completes the process of translating the RDA rewording, as well as including RDA annual updates from 2013 to 2016, and fast-track changes. The French translation also includes the RDA-MARC 21 mappings and the RDA Toolkit help files. RDA Reference, which is a subset of RDA that includes all RDA elements and all value vocabulary terms and definitions, has also been made available in French in the RDA Registry. The French translation of RDA is maintained in partnership by BANQ and LAC. Details of the changes in the French translation for each RDA Toolkit release are posted at: <http://www.rdatoolkit.org/translation/french>

### Bibliothèque et Archives nationales du Québec Authority File in VIAF

The 362,000 record name authority file from BANQ has been loaded in VIAF since September 2015. This is a French language file encoded in MARC 21 and, since 2013, established following RDA. Prior to that the French translation of AACR2 was the standard applied in the formulation of established forms of names. The file includes personal names, corporate names, meeting names, place names, and title or name/title access points for works and expressions. Based on the legal deposit and heritage collections of BANQ, the file's strength is in Quebec names. The

LAC bilingual Canadiana name authority file has been present in VIAF since 2011.

### Dewey Decimal Classification

The French translation of the 23<sup>rd</sup> edition of the Dewey Decimal Classification was completed in September 2015. The project is the fruit of a multi-year and ongoing collaboration between ASTED (Association pour l'avancement des sciences et techniques de la documentation), the Bibliothèque nationale de France, BAnQ and LAC. In consideration that this will likely be the final printed edition in French, special attention was paid to bringing the schedules up-to-date taking into consideration evolving perspectives arising from the growing body of knowledge and the acceleration of societal change.

The translation is published both in a 4-volume print edition, and in WebDewey. Both are available from ASTED, the national association of francophone libraries in Canada ([www.asted.org](http://www.asted.org)). The Canadian WebDewey is bilingual, including both the complete English text and the French translation of the full Dewey schedules. Translations of ongoing updates are published to the Canadian WebDewey as soon as they are completed and editorially reviewed.

Two Canadians are members of the international Dewey Editorial Policy Committee: Sylvie Leblanc from BAnQ and Paula van Strien from LAC.

### Canadian LCC-Compatible Schedules Updated

The Canadian History (FC) and Canadian Literature (PS8000) classification schedules have both been updated and issued online in new editions. These editions have incorporated the additions and changes issued over the years including the addition of a new range of numbers for Nunavut, Canada's newest territory. Time periods have been brought up to date, the lists of examples of groups of

people, special subjects and forms of literature have been revised. New classification numbers were added to the literature schedule for collected works by Canadian statesmen.

LAC announcement in English:

<https://thediscoverblog.com/2015/12/14/library-and-archives-canada-releases-two-revised-classification-schedules/>

L'annonce de BAC en français :

<https://ledecoublogue.com/2015/12/14/bibliotheque-et-archives-canada-publie-deux-tables-de-classification-revisees/>

Class FC: a classification for Canadian history, 3<sup>rd</sup> edition

[http://epe.lac-bac.gc.ca/100/200/301/lac-bac/class\\_fc\\_index-ef/e/n03/index.html](http://epe.lac-bac.gc.ca/100/200/301/lac-bac/class_fc_index-ef/e/n03/index.html)

Classe FC : une classification pour l'histoire du Canada, 3<sup>e</sup> édition

[http://epe.lac-bac.gc.ca/100/200/301/lac-bac/class\\_fc\\_index-ef/f/n03/index.html](http://epe.lac-bac.gc.ca/100/200/301/lac-bac/class_fc_index-ef/f/n03/index.html)

PS8000: a classification for Canadian literature, 4<sup>th</sup> edition

[http://epe.lac-bac.gc.ca/100/200/301/lac-bac/class\\_ps8000-e/4th\\_ed/index.html](http://epe.lac-bac.gc.ca/100/200/301/lac-bac/class_ps8000-e/4th_ed/index.html)

PS8000 : cadre de classification de la littérature canadienne, 4<sup>e</sup> édition

[http://epe.lac-bac.gc.ca/100/200/301/lac-bac/class\\_ps8000-f/4e\\_ed/index.html](http://epe.lac-bac.gc.ca/100/200/301/lac-bac/class_ps8000-f/4e_ed/index.html)

### **Canadian National Heritage Digitization Strategy**

A national plan of action for the co-ordination of digitization efforts is underway and will assure the long-term viability of digitized documentary heritage by encouraging the application of quality, standards-based efforts. The strategy will identify standards and methods that can be used by memory institutions, large and small, and that are based on best practices of international colleagues. It will cover published and unpublished analogue materials of national, regional and local significance: books, periodicals, newspapers, government records (mandatory for federal records, voluntary for other levels of government), posters, rare books, theses, artefacts, photographs, documentary art, film and video, audio recordings, maps, etc., held at public and private archives, libraries, museums/galleries, associations, non-profit organizations, corporations, and other memory institutions. A central metadata repository to support the strategy is being considered.

### **NEWS FROM THE GERMAN NATIONAL LIBRARY**

*Elke Jost-Zell*

#### **Section AfS, Office for Library Standards**

After having successfully introduced RDA to the libraries in Austria, Germany and Switzerland last year the German speaking library community returned to the challenges of everyday's work.

#### **European Region Representative**

The main focus for Europe in recent months was the implementation of the new governance strategy. EURIG (European RDA Interest Group) is responsible for the transition. The first Europe Proposals were contributed to the RSC in August 2016 and responses to all proposals and discussion papers were submitted on time.

The UK and DNB constituencies have now been replaced on RSC by a Europe Region representative, in accordance with the interim arrangements agreed in the EURIG meeting in Riga in May 2016. The Executive Committee is revising the terms of the EURIG Cooperation Agreement in advance of next year's meeting. Among the changes agreed in Riga was the creation of an Editorial Committee, Chaired by the Europe Representative. The Committee began work in July, using the DNB's infrastructure. Members of the Editorial Committee are from Austria, Denmark, Finland, Germany, Iceland and Switzerland, United Kingdom.

EURIG has 41 member organizations in 24 countries.

Three new members have joined during 2016:

- The eLABa Consortium (Lithuania)
- The National Library of Estonia
- The National Library of Israel



Renate Behrens, Europe Region Representative to the RSC (Photo courtesy of Stephan Jockel)

#### **RSC Meeting in the German National Library**

The members of the RDA Steering Committee (RSC) met at the German National Library in Frankfurt am Main from November 7 to 11, 2016. Guests included the Chair of the RDA Board Simon Berney-

Edwards, the Chair of the RSC Music Working Group, Damian Iseminger and the Chair of the RSC Aggregates Working Group, Deborah Fritz. Numerous observers from Europe also took part in the public parts of the meetings.

The general purpose of the annual meeting of the RSC is to discuss and adopt the proposals and the discussion papers which have been submitted to the annual RDA review process during the course of the year. This year, however, the main focuses were on the forthcoming 3R toolkit redesign project, on adaptation of the content of the RDA standard to bring it in line with the IFLA Library Reference Model (IFLA-LRM) and on the closer alignment of the code with the current technical possibilities offered by the so-called 4-Fold Path in the future.

The RDA Toolkit is set to be relaunched in the spring of 2018. The interface is being completely redesigned and modern features integrated. A user survey is currently being conducted for this purpose. The glossary is already fed directly from the Open Metadata Registry and the integration of a translation tool is also planned for this year to support the extensive amount of translation work. The plan is to keep the working basis for users as stable as possible, and there will be no interim solutions.

The RDA standard is based on the Functional Requirements for Bibliographic Records (FRBR) model. The FRBR Review Group, a working group of the IFLA Cataloguing Section, has been working on an update for some time now. A first draft was presented in the spring of 2016 and comments invited. In August, an updated draft was developed during this year's IFLA World Congress in Columbus, Ohio, which is to be presented to the Cataloguing Section and the Committee of Standards of IFLA for adoption. Publication of the new IFLA LRM model is scheduled for spring 2017. The resulting changes in the RDA standard are part of the 3R Toolkit Redesign project.

A further component of the 3R project is the so-called 4-Fold Path. It describes four ways of describing an entity and all other entities related to it. It distinguishes between unstructured/structured description and description based on identifiers or URIs. The purpose of this approach is to meet a variety of users' needs, from cataloguing cards through to linked data applications.

Extensive preparation is necessary for implementing such approaches. For this reason, the annual review procedure is being suspended in 2017. At this year's RSC Meeting all proposals and discussion papers were deferred which are affected by the planned redesign. The issues will be incorporated in the new concept.

The following timetable was agreed by the RSC members:

- *February 2017*  
No translations of, or corrections to, the RDA Toolkit can be made. Simple fast tracks will be included.
- *April 2017*  
Actioning of the proposals adopted at the RSC Meeting in November 2016 and update of the English version,
- *August 2017*  
Update of all translations. The content of all translations and the English original is based on the version from April 2017.
- *October 2017*  
No release
- *February 2018*  
Rollout of the new toolkit interface
- *April 2018*  
LRM-release of the RDA Toolkit

The RSC will meet twice in 2017 due to the large amount of work. The first meeting will be held from 17 to 19, May in Chicago, and the second at the end of October or beginning of November in Europe.

The RSC will report regularly on the work progress on its website at <http://www.RDA-RSC.org/news>.



Front row, from left: Judy Kuhagen, Renate Behrens, Linda Barnhart, Damian Iseminger

Second row, from left: William Leonard, Gordon Dunsire, Kathy Glennan, Simon Berney-Edwards, Ebe Kartus, Deborah Fritz, Kate James, David Reser

(Photo courtesy of Stephan Jockel)

### **New RDA partners: cultural institutions**

As RDA is considered to be a standard for any memory institution the Committee for Library Standards invited museums, archives and other cultural institutions and networks to join the RDA community. Although they do have individual and different requirements on the creation and indexing of metadata, cultivate standards of their own (e.g. RNA), and catalogue unique items mainly for their own accession purposes, metadata interchange among each other is increasingly considered a worthy task.

Standards should of course correspond with RDA rules. Taking the example of RNA, rules already laid down in RDA could be eliminated from RNA, and rules only embedded in RNA could be referenced in RDA. The expert panel for subject indexing will follow this lead by presenting a RDA compatible revision of the Rules for the Subject Catalogue (RSWK) in 2017.

The Committee for Library Standards assigned the expert panel for subject indexing to adapt the Rules for the Subject Catalogue (RSWK) for the new situation after the implementation of RDA: the RDA rules for FRBR-entities of group 1 and 3 apply as well for subject indexing. The revised version of RSWK will be published with the consent of the Committee for Library Standards, hopefully in 2017.

For information on the Office of Library Standards in the German National Library, please contact Renate Behrens-Neumann, Section AfS, Office for Library Standards, Europe Region Representative to the RSC: [r.behrens@dnb.de](mailto:r.behrens@dnb.de)

### **Subject Cataloguing – Quo Vadis?**

The Satellite Conference “Subject Cataloguing – Quo vadis?” brought speakers from Austria, England, Germany, Italy, Serbia and Switzerland as well as many subject cataloguing experts together at the German National Library on 4 November 2016.

They took a close look on subject access from different perspectives. Discussions included the needs of library users, cooperation between libraries and other cultural institutions. It was discussed what impact the requirements of the digital world have on cataloguing rules and practice and how RDA might be an answer to this paradigm

shift. In lively debates the participants dared to time travel into the possibilities of future work with standards and automated indexing in cultural heritage institutions.

<http://www.dnb.de/DE/Standardisierung/International/rscSatelliteMeetingProgramm.html>



Front row, from left: Tiziana Possemato, Christoph Steiner, Christian Aliverti, Markus Zerbst

Second row, from left: Dr Madeleine Boxler Klopfenstein, Heidrun Wiesenmüller, Ulrike Junger, Angela Kailus, Renate Behrens, Vesna Zupan, Esther Scheven, Janet Ashton

(Photo courtesy of Stephan Jockel)

### **Department EF Acquisition and Descriptive Cataloguing**

*Integrating ISSN assignment into cataloguing workflow*

The National ISSN Centre for Germany is located at the German National Library. Ever since the establishment of the centre in 1974 there had been deliberations about the possible merging of the workflow for creating bibliographic records for ISSN into the general workflow for describing continuing

resources for the German National Bibliography. So far this has proved to be difficult due to different cataloguing practices (ISSN Manual and the German cataloguing rules RAK). With the implementation of RDA in Germany the German National Library has been running a project for analyzing the possibilities of integrating the ISSN workflows by using RDA for cataloguing.

The project's aim was to merge the so far separated ISSN workflows for data and object into the general cataloguing workflow of the DNB and to reuse the metadata of the German Union Catalogue for Serials (Zeitschriftendatenbank) for ISSN records.

During the project the ISSN Centre's work process was analyzed and optimized in order to assign an ISSN for almost every newly published continuing resource as part of the normal cataloguing procedure. The new workflow has started at the beginning of December 2016.

For publishers requesting an ISSN in advance for projected continuing resources an ISSN is conducted by ISSN specialists. The need for a retrospective ISSN for current continuing resources is expected to diminish after implementing the new workflow as in most cases the ISSN will already be assigned during the everyday cataloguing process.

Project partners: International ISSN Centre (<http://www.issn.org/>)

Zeitschriftendatenbank (<http://www.zeitschriftendatenbank.de>)

For general information on the ISSN Centre for Germany, please contact Christian Schütz

Section EF.6 Periodicals, [c.schuetz@dnb.de](mailto:c.schuetz@dnb.de)



Christian Schütz, ISSN Centre for Germany  
(Photo courtesy of Stephan Jockel)

### Section AEN, Automatic indexing, online publications

#### *Digital collection*

The revised "Gesetz über die Deutsche Nationalbibliothek, DNBG" (Law on the German National Library) celebrated its 10<sup>th</sup> anniversary on June 29, 2016. In 2006 the former Die Deutsche Bibliothek (The German Library) was renamed as Deutsche Nationalbibliothek (German National Library) along with the expansion of its collective mandate for online resources.

The collection spectrum now covers text, image and sound-based works available on public networks except those excluded by the library's revised legal deposit regulation and collection guidelines. The library collects e-books, electronic magazines, dissertations, digitized content, audio books and websites. There are various submission procedures for online publications: web forms, primarily suited for the submission of smaller quantities or individual titles, and interfaces for an automatic submission, preferential for larger quantities.

Furthermore, the German National Library cooperates with a service provider to collect selected websites by using automatic web

harvesting. An extensive crawl of the top level .de domain was conducted in 2014.

For general information on online publications in the German National Library please contact Elisabeth Mödden, Section AEN, Automatic indexing, online publications, [e.moedden@dnb.de](mailto:e.moedden@dnb.de).

### Metadata available free of charge under CC0 - tremendous feedback

*Jochen Rupp*

All bibliographic data of the German National Library and the authority data of the Integrated Authority File (GND, <http://www.dnb.de/EN/gnd>) are provided free of charge and can be freely re-used under "Creative Commons Zero" (CC0 1.0, <https://creativecommons.org/publicdomain/zero/1.0/>) terms since 1 July 2015.

The metadata can be obtained via online interfaces (Data Shop, SRU, <http://www.dnb.de/EN/sru> or OAI, (<http://www.dnb.de/EN/oai> etc.) in the standard formats (<http://www.dnb.de/formats>) following initial registration and authorisation (registration free of charge). In addition the German National Library offers for those who prefer a deployment via FTP or WWW servers. For this active provision of data a fee will still be charged. The corresponding list of charges is published annually on 1 April and then applies from 1 July.

By offering the metadata free of charge for unlimited re-use, the German National Library is supporting the free flow of data, especially amongst providers of bibliographic data, and is helping to realise the vision of a universally accessible "web of data".

The German National Library is the central archiving library and national bibliography centre of the Federal Republic of Germany. Besides offering use of its collections at the Leipzig and Frankfurt sites,



the German National Library also provides services for libraries, the book trade and scientific institutions, plus a large number of other individual services via the internet.

For further information:

Data Service <http://www.dnb.de/dataservice>,  
Business model  
<http://www.dnb.de/businessmodel>

Contact details: Jochen Rupp,  
email: .rupp@dnb.de

### BIBLIOGRAPHERS' MEETING IN SERBIA

*Ana Stevanovic, National Library of Serbia*



Photo: Harriet Aagaard

The 20th "Bibliographers' Meeting in memory of Dr Georgije Mihajlović" was held on November 18th 2016 in Indjija, small town near Belgrade, Serbia. Public library „Dr Đorđe Natošević<sup>3</sup> from Indjija has been organizing this event since 1983.

The Bibliographers' Meeting was established in the memory of dr Georgije Mihajlović. He was a medical doctor by profession, but by vocation he was book lover, collector and expert for old and

rare books. He was also the author of "The Serbian Bibliography of the 18th Century".

At first, this very important event for bibliographers was held annually, but since 1987 it has been held every other year. In 1996, an award called "Mitrovdanska povelja" was established within "The Bibliographers' Meetings". Professionals were awarded for their exceptional achievement and contribution in the field of bibliography. In the year 2012 the award changed its name into "Dušan Panković's award", in the memory of one of the Serbian most prominent bibliographers and one of the founders of "The Bibliographers' Meeting".

This professional and scientific gathering is focused on the theoretical and practical aspects of the discipline of bibliography. The aim is to point out the importance of the discipline, not just to librarians, but to all researchers. The most prominent bibliographers, librarians and scholars from Serbia and other countries of ex-Yugoslavia, participate in this unique professional gathering. Participants discuss and debate about the theory of the discipline and they present practical solutions and examples from their own bibliographic experience and practice. All presented scientific papers are published in the Anthology of the Bibliographers' Meeting in memory of dr Georgije Mihajlović.



The Cultural Centre of Indjija. Photo: Ana Stevanovic.

<sup>3</sup> <http://www.bibliotekaindjija.rs/obibliotecie.htm>

Thirty nine papers were presented, divided into four sessions. Presented papers dealt with various topics. Theory and methodology of bibliography and current issues of bibliographic theory and practice were topics of several papers. Most of the participants presented their own bibliographic practice: bibliographies of rare books and manuscripts, bibliographies of philosophical and historical works, bibliographies of significant people etc. The main topic for the majority of papers were bibliographies of serial publications.

“Bibliographers’ Meeting in memory of dr Georgije Mihajlović” is an important event for bibliography and a place for scientific and professional exchange. The participants agreed that the tradition should be maintained and improved.

### NORWAY - AUTHORITY FILES FOR WORKS

*Elise Conradi, National Library of Norway*



The National Library of Norway is in the process of developing an openly available authority file for Works. We are currently basing our definition of Work on a pragmatic interpretation of FRBR (and by extension RDA) and have taken a threefold approach to identifying Works and populating the file.

First, we are examining methods and algorithms to automatically extract Works from legacy records. Secondly, we intend to manually correct catalog

posts that have been wrongly identified in the first round. Finally, we are working on developing clear ways to use and populate the file in future cataloging based on RDA guidelines.

The authority file will include a global identifier for each Work, attributes such as title, alternative titles and first year of publication, and relevant relationships between Works, like “based on” and “derivative of”. We are also examining ways to identify Expressions (such as translations and audio formats) within the file. Additionally, the authority file for Works will contain links to other authority files, such as our authority file for Names to designate various creator roles. The authority file will be available for use in cataloging and for end-user discovery platforms in the form of an API and as Linked Open Data.

### WHO NEEDS THE UDC? NOTES FROM ESTONIAN LIBRARIES

*Jane Makke, Coordinator of Bibliographic Activities, National Library of Estonia*



At the end of 2015 the National Library of Estonia conducted a survey among the entire Estonian

library network to find out if, why and to what extent is UDC used in Estonian libraries. An invitation to take part in the survey was sent to 859 libraries<sup>4</sup>, among them 435 public libraries, 375 school libraries and 49 special and research libraries. Answers to the questionnaire were returned by 339 libraries which amounts to 40% of all those who received the invitation. The majority of the answers came from public libraries (170). Although research and special libraries formed just 11% of the responding libraries, the proportion of received answers against the number of invited participants was the highest among them – 76%.

The questionnaire consisted of four parts: usage of UDC, application areas, organisation of the classification work, and finally an estimation by the respondents how detailed UDC classification system is actually needed.

### Usage of UDC

Out of the entire 339 libraries who sent their answers, 312 libraries (92%) claimed that they use UDC. Only four libraries could not answer that question. Libraries currently not using UDC did not consider it probable that they would adopt the system for two main reasons: in their opinion the UDC structure is not sufficiently exhaustive in some subject fields, and the search habits of the users usually exclude the UDC. One library indicated that they use the DDC instead.

### Application areas

One of the survey's objectives was to identify for what purpose the UDC is used. The answers reveal that 84% of libraries use UDC for arranging their collections, 50% in their in-house work processes,

46% in user services and 8% for compiling bibliographic lists.

The free answers show that public, school and special libraries prefer UDC because it conveniently allows to identify the lending habits and interests of the users which in turn enables to compile the collection's statistics by item classes. The application possibilities of the UDC also include its usage in answering enquiries or compiling subject lists as a current awareness service. The responding libraries considered that UDC is helpful in carrying out information search and offers orientation assistance for users in the reading room. The respondents pointed out that if all libraries used the same classification system, it would considerably help users to take their bearings in different libraries and find the desired publications quickly and easily.

The free answers from research libraries stated that UDC is necessary for carrying out better searches, but its advantage is also the fact that a standardised scheme helps the user to get an overview of the subject field and collections. The respondents stressed that UDC enables searches which cannot be carried out with subject terms. It was also mentioned that UDC is an international classification system enabling the use of linked data in the semantic web.

### What do libraries need?

Next question tried to develop an overview how detailed UDC schemes the libraries would need. Although the aim was to identify what is needed, the answers actually reflected the existing situation or the classification tables that are in everyday use.

The free answers indicate that quite often libraries use different levels of classification for different work processes: e.g., in the bibliographic record the complete UDC tables are preferred, while collections are arranged according to the UDC Summary. Sometimes the complete UDC tables are used as a tool for finding a more appropriate index, while the classification is actually carried out under

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<sup>4</sup> According to the *Statistics Estonia*, the number of libraries operating in Estonia in 2014 was 956.

[http://pub.stat.ee/px-web.2001/I\\_Databas/Social\\_life/01Culture/10Libraries/10Libraries.asp](http://pub.stat.ee/px-web.2001/I_Databas/Social_life/01Culture/10Libraries/10Libraries.asp)

UDC Summary. This practice is followed in all types of libraries. In general, libraries want the tables to be simple, convenient to use and understandable for both library staff and users.

Libraries who prefer the complete UDC tables gave very practical reasons for their preference – records copied from the national bibliography already contain detailed numbers and thus it is possible to take advantage of them without any additional effort. The respondents also mentioned that using the complete UDC has become a habit, and also the fact that it contains the necessary auxiliaries. One research library explained that although Estonian-language tables are quite sufficient for the adequate opening of the content of items, in some cases the Russian-language UDC tables and also the English-language *UDC: international medium edition* (1993) are being used.

Libraries preferring to use the UDC Summary claim that in cases where the library lacks the printed UDC or access to the UDC online, the UDC Summary provides a so-called middle ground for deciding what to use for analysing the content of publications. The UDC Summary is also valued for being user friendly, convenient, simple and understandable in finding the appropriate classes and auxiliaries. Yet some libraries indicated that for certain subject areas Summary is too general. For that reason the respondents considered the accessibility of the complete UDC tables to be extremely important. Some respondents confessed that before the survey they had not even been aware of the existence of the UDC Summary.

One problem indicated by libraries is the fact that for some subject areas special agreements have been concluded in Estonia, thus it is not possible to

rely solely on online sources, and libraries also have to use the print publication<sup>5</sup>.

Some libraries were of the opinion that it would be necessary to find something even simpler as the UDC classification system has become outdated and no longer meets the interest of its users. Some opinions considered the proportion of UDC-based searches to be insignificant among users.

### Work organisation

The last questions of the survey inquired about work organisation. The answers show that at the same time several workflows are in use – libraries classify the publications themselves, and the UDC numbers are obtained by copy cataloguing. In public libraries the classification numbers are usually added to the records by the central public library responsible for acquisition and cataloguing in its area. The choice depends on the type of the library as well as the type of publication. The records obtained by copy cataloguing are mostly used in the case of foreign publications, as well as of national publications for which the National Library compiles bibliographic records within 24 hours after their arrival in the library.

### To sum up

The survey reveals that the UDC numbers added to the bibliographic records are among the main tools for Estonian librarians in their everyday work. The purpose of the use and extent of detail of the UDC system vary but respondents agree that libraries could not function without disclosing the content of the publications in their collection. UDC serves as the basis for arranging collections, offering user services, compiling lists, but also for statistical analysis on collections, loans and customer preferences. No doubt the list of usage possibilities could be longer.

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<sup>5</sup> Complete UDC tables were translated into Estonian and issued in print in 1999.

Yet cataloguing, classifying and subject cataloguing continue to be among the most expensive work operations for libraries, thus raising the question of how to achieve the desired result with the lowest possible costs. A way out might be an application enabling to automatise the work to a maximum extent.

### Notes:

As of February 2016, after a long and thorough consideration, the National Library of Estonia began to use *UDC Summary* for classifying, being the second major library in the country to adopt *UDC Summary* after the University of Tartu Library. Unlike the University of Tartu Library, the National Library took the *UDC Summary* into use without localising its currently valid table according to the local circumstances and needs.

### UDC AND INDIGENOUS PEOPLE

*Edgardo Civallo,*  
e-mail: [egardocivallero@gmail.com](mailto:egardocivallero@gmail.com)



Are current classification schemes well suited to represent a reality like the one in Latin America, with all its different sides, specially the indigenous ones? No, they are not. For decades, Latin American librarians have used classifications and other

indexing languages as Procrustean beds: they forced their documents' contents into the limited, and sometimes biased, classification structures. Indigenous concepts and facts were always cut out; hence, a significant amount of knowledge —and an immense heritage, a part of the Latin American identity— was set aside.

In the last years, the main bibliographic classifications' editorial boards started tackling that issue. Most noteworthy is the effort made by UDC to include a large number of American indigenous languages in its schedules. This allowed the expression of languages and literatures as well as ethnic groups, their geography and history, as facets or as main subjects. At the same time, a huge and long-neglected vocabulary was incorporated into its databases. But that was just a first step: a sort of *acknowledgment of the Other's existence*. There's still much to be done.

Six years ago I embarked in a personal project: the translation of the UDC Summary —about 2000 classes on a free, online, multilingual database— into three indigenous languages: Quechua (Runasimi), Guaraní (Ava-Ñe'é) and Mapuche (Mapudungu). My initial goal was to furnish the (still few) library services for indigenous peoples in the southern half of South America with the first classification written in native languages — an idea I've been cherishing since I started working on this kind of library services back in the 2000's. However, what started as a "simple" translation project ended showing up a set of issues, a number of challenges and a couple of surprises. The outcome was not as expected —I haven't achieved what I'd consider a "complete" translation of UDC schedules in these languages—, but a handful of questions were obtained that may guide further research and provide ideas for future guidelines. Guidelines that could be used to build improved, inclusive, diverse, culturally-respectful indexing languages: from classification schemes to thesauri and keyword lists.

The first problem I faced was a lack of vocabulary in the target native languages. Most of them, at least in Latin America, haven't developed words to designate modern elements or phenomena: they just acquire what is needed from the official/prestige languages (Spanish or Portuguese). A number of initiatives on this topic have been developed since the late nineties, in order to create new terminology; however, the results are still poor, and speakers barely know/use them. On a day-to-day basis, people build neologisms based on Spanish/Portuguese words: if written, they are usually adapted to the indigenous phonological and orthographic rules.

Using the elements at hand, a translation of the UDC Summary was attempted. Unsuccessfully: most of the words in the final result turned out to be neologisms, and most of them just echoed Spanish words. Anyway, even if that outcome could be considered a decent, fully-operative UDC translation actually usable in a library, a question arose: would be such a classification really useful for an indigenous user?

The answer was negative. Even if written in native languages, the classification kept the vocabulary, the structure, the mechanisms and the instructions of the original, biased scheme — a scheme that overlooks many aspects of the life, culture and reality of these peoples and that, until 2010, overlooked the very existence of the peoples themselves. A second stage in this project was needed, in order to make the classification more relevant for an indigenous user *from an indigenous point of view*.

Hence, I collected, organized and placed in the already translated scheme a good deal of Quechua, Guaraní and Mapuche cultural elements. The idea was to expand the structure, maintaining its

internal rules to keep it operative and solid, while at the same time enriching the classes with vocabulary and with notes: instructions, explanations, definitions, observations, etc. When the process was complete —and it took some time—, many aspects of the three indigenous societies' life could be classified. At that moment I realized that all that information, so carefully organized, would be useful not only to "indigenous libraries", but to all libraries in Argentina and neighboring countries: most of them have to deal with contents having native backgrounds, or with documents about aboriginal issues. Therefore, the Spanish UDC Summary was expanded, following the same methodology used for the indigenous translations.

However, the main problem still persisted: the structure of UDC had been kept. And that structure was built from a European point of view — which is not intrinsically bad or wrong, but leave outside other possible perspectives or world views. While it's evident that any classification should be built from a particular position —and that position will pervade the entire framework, the rules and criteria, the vocabulary itself—, it's also true that any indexing language can be thought from a more inclusive point of view.

Even if it's true that current classification schemes cannot be drastically re-structured, they should at least deal in a clear, open way with their limitations, providing as much alternatives as possible for users coming from different cultural frames. The third and final stage of this project, then, included the analysis of the main differences between the world view behind UDC and the general indigenous world views, and the creation of a set of instructions providing such necessary alternatives — specially instructions about what to do when classifying a document or a piece of knowledge that, from the user's perspective, does not fit in a Western structure. Though "Western" may not be a proper term: many European traditional groups share many socio-cultural traits and patterns with Latin

American indigenous societies (and have their same problems when working with indexing languages).

Now it's time to systematize the work, to discuss the outcomes with researchers and users from other areas of the world —Africa, south-eastern Asia, India—, and to compare results with those obtained during similar experiences in Canada, Australia and New Zealand. Some principles may be extracted, guidelines can be built, and hopefully, practical tools may be developed to improve existing indexing languages and to build culturally-inclusive new ones.

### NEWS FROM LIBRARY OF CONGRESS

*Susan R. Morris, Special Assistant to the Director, Acquisitions and Bibliographic Access, Library of Congress*



Susan Morris.

The following is a summary of news from the Library of Congress since our previous report in the June 2016 issue of the *IFLA Metadata Newsletter* (vol. 2, no. 1).

#### Staffing

The Acquisitions and Bibliographic Access Directorate (ABA) in fiscal 2016 was very fortunate to receive approval to hire nearly 45 staff members,

including supervisors for the CIP Technical Team (US Programs, Law, and Literature Division), Science, Medicine, and Agriculture Section (US Arts, Sciences, and Humanities Division), Law Section (USPRLL), and U.S. Monographs Section (US/Anglo Division). The directorate also hired 13 librarians, two office staff, and technicians, instructors, program coordinators, and digital project coordinators. Many of the positions were filled from within the Library and therefore resulted in new vacancies, leaving the ABA Directorate with only six more total staff than it had a year ago. However, ABA did gain a number of librarians from other institutions who bring fresh skills and perspectives to the directorate. The ABA Directorate currently has 422 employees and about 65 contractors and volunteers, many of whom are retired employees who wish to contribute to librarianship on a part-time basis.

#### BIBFRAME

The Library's Network Development and MARC Standards Office (NDMSO) and the Cooperative and Instructional Programs Division (COIN) completed and evaluated a successful pilot for BIBFRAME, the Bibliographic Framework Initiative to redevelop the bibliographic data exchange environment in order to reap the benefits of newer technology, particularly data linking. The Pilot was groundbreaking, being the Library's first attempt to have production catalogers use a linked data oriented system to create bibliographic descriptions. The Pilot continued officially for six months and the results were summarized in a document posted on the BIBFRAME website.<sup>6</sup>

The following tools and components contributed to the Pilot and to the encouragement of experimentation with BIBFRAME by the community,

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<sup>6</sup> *BIBFRAME Pilot (Phase One—Sept. 8, 2015 – March 31, 2016): Report and Assessment*  
<http://www.loc.gov/bibframe/docs/pdf/bibframe-pilot-phase1-analysis.pdf>.

since they are made available for download on the software sharing site, GitHub:

*BIBFRAME model and vocabulary.* The input from catalogers in the BIBFRAME production pilot, commenters on the BIBFRAME listserv, and a Program for Cooperative Cataloging review committee enabled NDMSO to make considerable improvements in the basic model and data element vocabulary, leading to publication of a BIBFRAME 2.0 model and vocabulary in April 2016. The specifications for the conversion of MARC data to the BIBFRAME 2.0 vocabulary are now being developed in preparation for a Pilot of BIBFRAME 2.0 in 2017.

*BIBFRAME infrastructure.* In 2016 NDMSO continued upgrading servers and systems to handle new traffic loads anticipated for linked data resolution, label lookup, and other services related to the BIBFRAME project and LC's Linked Data Service (LDS/ID) <id.loc.gov>, which averaged more than 600,000 searches per day in 2016. An upgrade to the MarkLogic datastore server software to MarkLogic Version 8 was installed and data conversion began. This upgrade will enable the inclusion of native handling of RDF (Resource Description Framework) triples in the database and security updates. This effort will continue into 2017 as the new system moves into production. The staging server for LDS/ID will also be upgraded to support the BIBFRAME 2.0 Pilot planned for 2017.

*BIBFRAME Editor (BFE).* Development of the BIBFRAME Editor input tool continued, and was integrated with profiles provided by the Profile Editor. Lookups were also developed for resources within LDS/ID that were needed by the Editor. The enhanced BIBFRAME Editor was successfully used in the BIBFRAME Pilot to develop descriptions of library resources using the BIBFRAME 1.0 model and vocabulary. By the end of September 2016, a new version of the editor was under development using the BIBFRAME 2.0 ontology.

*BIBFRAME Profile Editor.* A BIBFRAME Profile Editor, which was needed to make the BFE flexible for use with different forms of material, was used with the BFE in support of the 2016 BIBFRAME Pilot. Version 1.2 of the Profile Editor was released later in 2016, including profiles for Monographs, Serials, Notated Music, Cartographic, BluRayDVD, Audio CD and 35mm Feature Films using the BIBFRAME 1.0 Ontology. Profiles for the BIBFRAME 2.0 Ontology and upcoming new Pilot were under development at the end of the 2016 fiscal year.

The Library of Congress awarded a contract in fiscal year 2014 to add the MARC transformation software to Metaproxy, a tool used by the Library to enable its Integrated Library System to process Z39.50 and SRU (Search/Retrieval by URL) protocol queries and return records in various exchange formats. The software, which adds BIBFRAME to the possible output formats, was developed in 2015 and installed in 2016. This work led to the enhancement of the SRU standard search protocol and its query language Contextual Query Language (CQL). These standards are maintained by the Library of Congress and used extensively by LC and the library community for information retrieval.

The Library continues to develop BIBFRAME in order to reap the benefits of newer technology, particularly data linking. The BIBFRAME initiative is publicized through websites, an electronic discussion group ("listserv"), and an open meeting at each American Library Association conference. To encourage community experimentation with BIBFRAME, the BIBFRAME tools are made available for download on the software sharing site GitHub at <https://github.com/lcnetdev/bibframe-catalog>.

### **Cataloging Production**

In the fiscal year ending Sept. 30, 2016, the Acquisitions and Bibliographic Access Directorate (ABA) and the Library of Congress special-format cataloging unit cataloged a total of 424,053 items on 282,588 new bibliographic records, including



1,260 archival records for the National Union Catalog of Manuscript Collections. The number of items cataloged exceeded the 268,250 items cataloged in fiscal 2015 by 58 percent, while the number of completed records exceeded the previous year's total of 271,977.

Copy cataloging accounted for 69,707 new records, compared to 74,940 in fiscal 2015, a decrease of 4.3 percent. Approximately half of the Library's copy cataloging was for foreign publications. Original cataloging, the category of most interest to other libraries that depend on the Library of Congress for much of their cataloging data, accounted for 156,012 records, a sharp drop from the production of 183,979 the previous year. The cataloging metadata that the Library of Congress produced are available everywhere in the Library of Congress Catalog on the World Wide Web and are distributed via the Library's Cataloging Distribution Service and bibliographic utilities for the benefit of the entire library community.

In a focused special effort from May 2015 until August 2016, four staff in the ABA China Section, Asian and Middle Eastern Division, completed the cataloging, using copy when possible, of 11,240 titles that were acquired in two sets, "Minguo ji cui" and "Minguo jicui xu", in fiscal 2014. These are collected reprints of publications originally dating between 1912 and 1949, the period when China was a republic.

The Library of Congress Catalog was improved in several important ways this year. Library staff produced 78,612 new name authority records to support searching with standardized search terms, and Program for Cooperative Cataloging member institutions contributed an additional 208,444. An additional 68,330 authority records were modified, generally by the inclusion of cross-references. The Library added 3,084 new authorized Library of Congress Subject Headings or genre-form terms, compared to 3,637 added in fiscal 2015. The ABA Directorate also revised 418,711 bibliographic

records to update subject search terms to contemporary language.

The continued expansion of cataloging in the Library's overseas offices in Cairo, Islamabad, Jakarta, Nairobi, New Delhi, and Rio de Janeiro helped maintain high production levels.

### **CIP/Library of Congress Dewey Program**

In the Cataloging in Publication (CIP)/Library of Congress Dewey Program, which was formed by a merger of two programs in February 2106, work continued on development of workflows to ingest new e-book content from the American nation's most significant publishers for the Library's permanent collections. A major effort of the CIP Program this year was to develop use cases and recommendations for how the Library can provide access to e-books in the future. The recommendations will be finalized and submitted to Library of Congress management in 2017.

Print and electronic books receiving Cataloging in Publication increased by 17 percent from the previous year, to 55,807 titles. The Electronic Cataloging in Publication (ECIP) Cataloging Partnership Program continued to grow with five new partners, bringing the total membership to 34, and the number of ECIP titles cataloged by the partners increased by five percent. The Partnership Program enables the Library of Congress to enhance its work product with the expertise of skilled librarians resident in libraries of all types throughout the U.S.

The CIP/Dewey Program continued to enhance records through the inclusion of publisher provided summaries, subject terms and annotations for children's literature, and tables of contents within bibliographic records for newly published U.S. titles. The ECIP Table of Contents feature that enables catalogers to readily add a Table of Contents note to a bibliographic record was used to enhance 20,706 records this year, an increase of 15 percent over the previous year's 17,930. (Additionally, the

USPRLL Law Section digitized tables of contents for 3,838 high priority legal titles, and the overseas offices added tables of contents to more than 1,500 records.) The program supported libraries worldwide that classify their titles in Dewey Decimal Classification (DDC) by assigning DDC numbers to 123,367 titles, an increase of 19 percent over the previous year. Of those, 4,357 were assigned through the Auto Dewey program, which automatically assigns the DDC number from the Library of Congress Classification number through use of a correlation tool.

### Demographic Group Terms: Pilot Phase 3

As report in the June 2015 and May 2016 issues of this newsletter, the Library of Congress has developed a new vocabulary, *Library of Congress Demographic Group Terms* (LCDGT). This vocabulary is used to describe the creators of, and contributors to, resources, and also the intended audience of resources. Terms may be assigned in bibliographic records and in authority records for works. The initial 387 demographic group terms were approved as the first phase of the pilot development in June 2015. Phase 2 of the pilot consisted of some revisions to previously approved terms and over 400 proposals for additional terms. Those proposals were approved in December 2015.

Phase 3 of the *Demographic Group Terms* pilot will continue through the end of 2016. Proposals for terms that are needed *in new cataloging only* will be accepted from PCC and non-PCC agencies. Proposals that appear to be made for retrospective projects will not be considered, because of PSD workload considerations.

The Draft Manual and additional information about the project may be found on the ABA Directorate's genre/form web page, <http://www.loc.gov/catdir/cps/genreformgeneral.html>. Questions and comments about LCDGT may be directed to Janis L. Young at [jayo@loc.gov](mailto:jayo@loc.gov).

Demonyms are the words that the residents or inhabitants of a place use to refer to themselves (e.g., people from the United States are Americans).

The Policy and Standards Division has decided in principle that demonyms for the residents of local places (e.g., counties, cities, city sections) may be included in LCDGT, but the appropriate level of disambiguation among demonyms that are, or that may be, used to refer to people from unrelated places must be determined. The form of qualifier must also be decided. In November 2015, PSD published a discussion paper entitled "Demonyms for Local Places in LC Demographic Group Terms: Analysis of the Issues." It generated numerous comments, which are under review. A decision on the policy issues is expected in 2017.

### Genre/Form Terms

In September 2016, the Policy and Standards Division in ABA began accepting proposals for new and revised genre/form terms in the disciplines of literature and religion as well as general terms, cartography, law, moving images, and radio programs. Library of Congress staff are working with the Music Library Association's Form/Genre Task Force to resolve some issues with music genre/form terms, before PSD can begin accepting proposals from the community for new or revised terms in music disciplines. Proposals should follow the guidelines and instructions in the draft genre/form term manual published in January 2016, <http://www.loc.gov/aba/publications/FreeLCGFT/freeelcgt.html> and in *Cataloger's Desktop*, the Library of Congress's subscription-based online documentation service. Questions and comments may be directed to Janis L. Young at [jayo@loc.gov](mailto:jayo@loc.gov).

### Program for Cooperative Cataloging (PCC)

The Cooperative and Instructional Programs Division (COIN) in ABA provides the secretariat for the Program for Cooperative Cataloging (PCC), an international consortium of institutions that catalog to mutually agreed standards and provide standards and training. In fiscal 2016 the PCC grew to include 957 institutional members. The four components of the PCC were the Monographic Bibliographic Record Program (BIBCO), Cooperative Program for Serials Cataloging (CONSER), Name Authority Cooperative

Program (NACO), and Subject Authority Cooperative Program (SACO). The BIBCO institutions contributed 57,003 monographic records in fiscal 2016, a decrease of 3.39 percent from the 59,005 BIBCO records contributed in fiscal 2015. The CONSER institutions contributed 17,413 new records in fiscal 2016, a 7 percent increase from the number reported in 2015.

A COIN staff member serves on the PCC Standing Committee on Standards. The work of this committee has a global impact and influences the policy and standards decisions reached by the Library of Congress. During the year the committee released revised versions of the *BIBCO Standard Record* and the *CONSER Standard Record* (June 2016); issued a new version of the *PCC Guidelines for Creating Records in Multiple Character Sets* (June 2016); participated in the worldwide review of the IFLA *FRBR-Library Reference Model*; worked with PSD on quarterly updates to the *Library of Congress-Program for Cooperative Cataloging Policy Statements* (112 changed, new, or deleted statements) and the *Descriptive Cataloging Manual* section Z1 (most of the latter resulting from the work of the PCC Series Policy Task Group); formed a PCC Task Group on Supplements and Special Numbers to Serials; and reviewed eight new proposals for RDA relationship designators submitted by PCC members.

### **RDA: Resource Description & Access**

The Policy and Standards Division (PSD) continues to play a key role in the development of *RDA: Resource Description & Access*. Dave Reser represented the Library of Congress on the international RDA Steering Committee (RSC), while Kate James served as chair of the RDA Examples Group and as Dave's backup on the RSC. Kate is also a member of the RSC Places Working Group and the RSC Translations Working Group. Three Library of Congress staff members serve on the RSC Music Working Group. With each quarterly release of the online RDA Toolkit, PSD and COIN updated the *Library of Congress-Program for Cooperative*

*Cataloging Policy Statements (LC-PCC PSs)* in conjunction with the PCC Standing Committee on Standards. Beacher Wiggins, the director for ABA, was the Library's representative to the RDA Governance Board.

### **U.S. ISSN Center**

The ISSN (International Standard Serial Number) Center in the Library of Congress USPRLL Division continued to provide service to the nation's publishers by assigning ISSNs to 5,893 new publications. Forty-five percent of the assignments were made to online resources, many of which were identified as part of the ISSN International Centre's Core e-journals Project. The percentage of new online resources that receive ISSN assignments has remained relatively stable over the last few years, indicating that print serial publications continue to be a significant share of the market.

There was a continued decline in the percentage of U.S. ISSN assignments made at the pre-publication stage in 2016; 17 percent of the total ISSNs assigned were to pre-publication titles. The past year saw an upsurge in requests to have ISSN assigned to subscription databases. These "integrating resources", which differ from serials in having new content seamlessly added to the existing content, have been eligible for ISSN since the ISSN standard was last revised in 2007. The increase in ISSN applications may be due to recognition that continuing resources are eligible for ISSN during a time when ISSN has become mandatory in transactions throughout the continuing resources supply chain.

The U.S. ISSN Center continued the Independent Voices Project, which began in fiscal 2015 and encompasses digitized versions of alternative press titles from the 1950s through the 1970s.

The U.S. ISSN Center participated in planning to revise the ISSN Standard, ISO 3297: 2007. The standard was balloted by the International Organization for Standardization (ISO) as part of its

five year review cycle. The ballot options were to approve, revise, or withdraw. The ISSN International Centre advocated for revision of the standard, the better to accommodate electronic resources; align ISSN metadata with other bibliographic standards; explore assigning ISSN at different levels of granularity such as an ISSN for a “serial family” or a serial’s subpart; and update the standard the better to enable the ISSN to function as a key identifier in the linked data environment. The vote to revise the standard was approved, and a working group will be convened in 2017.

The ISSN Network, of which the U.S. ISSN Center is a member, approved a new strategic plan that will expose part of the ISSN Register as Linked Open Data, and enhances ISSN records through addition of subject metadata and license information. The strategic plan also allows national centers to begin charging for ISSN assignments on a cost recovery basis. The Office of the General Counsel determined in 2016 that the Library of Congress does not have Congressional authorization to charge for ISSNs. The Library continues to see ISSN assignment in the U.S. as a public good that should not be charged.

Karl Debus-López, chief of the US Programs, Law, and Literature Division at the Library of Congress, continues his second two-year term as Chair of the International Standard Serial Number (ISSN) Governing Board. Regina Romano Reynolds continues as director of the U.S. ISSN Center.

### WLIC 2016 IN COLUMBUS, OHIO

BIBLIOGRAPHY@IFLA WLIC 2016: OPENING THE NATIONAL BIBLIOGRAPHY: TRANSFORMING ACCESS TO DATA AND BUILDING CONNECTIONS

*Rebecca, Lubas, Bibliography Section*

The Bibliography Section organized a thought-provoking program in Columbus. We learned about visualizing biographic data in Sweden, using CCo in Germany, and Search Engine Optimization in Iran. We were pleased to have over 100 attendees on the last day of the congress!

Ylva Sommerland spoke to the audience about ***Accessing National Bibliographic Data in Visual Dialog with Biographic Data***. The National Library of Sweden chose the interesting theme “life stories” as a focus for studying the type of materials held in its biographical collections. Sommerland experimented with the data visualization tool Tableau to create data pictures for research.



Ylva Sommerland, Rebecca Lubas and Anke Meyer Hess

Saeedeh Akari-Dayan presented A *Report of Publishing Open National Bibliography of Iran*. She highlighted the importance of web searching in user behavior, and how search engine optimization will bring more researches to library collections.



Saeedeh Akari-Dayan. Photo: Rebecca Lubas

Anke Meyer-Hess posed the question, ***What happens if you publish the National Bibliography under a CCO license? – Experiences of the German National Library (DNB)***. You can read more about the German National Library's program to provide free bibliographic an authority data in the very newsletter! Through this program, over 14 million bibliographic records are available. The paper describes how the infrastructure was created to support this service.

Please visit the IFLA Library to read our authors' papers at <http://library.ifla.org/view/conferences/2016/2016-08-18/716.html>

### AUTHORITY DATA ON THE WEB

*Unni Knutsen, Oslo University Library/IFLA Cataloguing Section*

The half day satellite meeting "Authority data on the web" was sponsored by the IFLA Cataloguing Section with VIAF Council and OCLC as co-sponsors and took place at the Conference Center at OCLC in Dublin, Ohio August 12 2016.

Despite the name of the event, the meeting concentrated on VIAF (Virtual International Authority File). [Link to <http://www.oclc.org/viaf.en.html>]. The purpose of VIAF is to be a low cost utility of library authority files by matching and linking widely-used authority files and making that information available on the Web.

Ed O'Neill started out by taking the audience back to the end of last century where there were many authority files and where the need for and benefits of having international authority files were long recognized. VIAF started out by the decision of Deutsche Nationalbibliothek and Library of Congress to provide their authority and bibliographic files. The role of OCLC was to develop matching algorithms and building a prototype. The agreement was signed during the WLIC in Berlin in 2003.

Thomas Hickey of OCLC has played a central role in the establishment of VIAF. Its scope is to include personal names, corporate and family names, but also information about titles, events etc. From the starting point of merging the files of two institutions, VIAF expanded by adding data from the Bibliothèque nationale de France. VIAF has further developed into having currently 44 participants, 55 million source authority records, 130 million bibliographic records, 256 million links between sources and 30 million external links. Over the years

VIAF has become an important hub in the Semantic Web.

Hickey naturally pointed to some of the hardships of aggregating authority data from many sources and trying to do deduplications. Several of the other speakers also touched upon this crucial activity, e.g.

Andrew MacEwan from the British Library/ISNI International Agency.

MacEwan pointed out that the scopes of VIAF and ISNI are different, as ISNI only deals with personal names and organizations. The roles are also different. VIAF concentrates on ingesting authority records from national and research libraries, whereas ISNI create permanent IDs and diffuse them. ISNI is also more cross-domain than VIAF. These differences do not prohibit cooperation. ISNI identifiers are present in VIAF and VIAF diffuses ISNIs, e.g. to Wikipedia. VIAF data is on the other hand a source in ISNI and the two products will be aligned even more in the future.

Following the ISNI presentation were presentations of use cases that clearly illustrated VIAF's value (Daniel V. Pitti and Ricardo Santos).

VIAF is a service relying on international cooperation. Maybe in the future even more regions will considering contributing to the service?

The presentations can be found at:  
<http://www.oclc.org/events/2016/ifla-2016.en.html>

### SUBJECT ACCESS: UNLIMITED OPPORTUNITIES

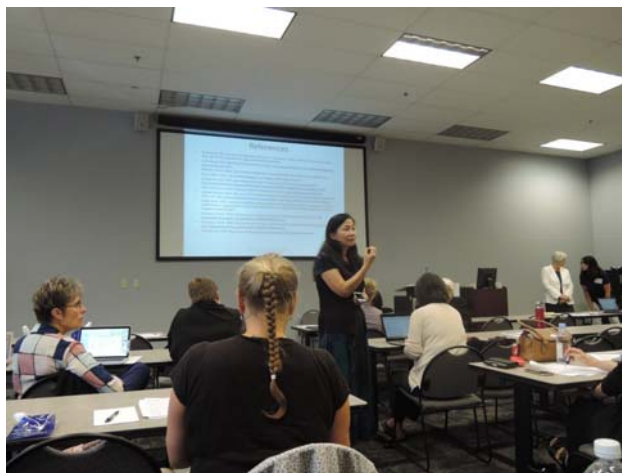
*Harriet Aagaard, Subject Analysis and Access Section*



Our keynote speakers Marcia Lei Zeng and Karen Markey in discussion during lunch. Photo: Harriet Aagaard

The IFLA 2016 Classification & Indexing Satellite Meeting (after WLIC 2016: Subject Analysis and Access Section) was a success.

Marcia Lei Zeng from Kent State University started with an inspiring keynote: Subject Access, Smart Data, and Digital humanities – finding unlimited opportunities through their intersections. She wanted us to make Smart Data out of Big Data, to use linked data. Ontologies are the key to success.



Marcia Lei Zeng. Photo: Harriet Aagaard

Karen Markey ended our second day with a categorization of the presentations at the satellite meeting:

Theme 1 : Innovation in Libraries Always Starts with Operations (5 presentations)

Theme 2 : Subject Access Innovations for End Users (5 presentations)

Theme 3 : Innovations Benefitting Both Library Operations and End Users Equally (2 presentations)

She ended with a discussion about subject access and what users need.

Hope A Olson and Lynne C Howarth talked about Subject Access Principles in the New World – Procrustean or Procreative? They discussed Aristotelean logic and Panizzi's rules from 1841 etc., design thinking processes using the example of buying a white mop on Amazon. Both interesting and entertaining.



Hope Olson and Lynne Howarth. Photo: Harriet Aagaard

The program, papers and presentation slides from the meeting can be found on the conference webpage

<https://sites.google.com/a/kent.edu/ifla2016-classification-indexing/program>.



A very happy program committee: Sally McCallum, Maja Zumer, Athena Salaba, Sandy Roe and Tiiu Tarkpea. Photo: Harriet Aagaard

### SESSIONS WELL ATTENDED DURING IFLA WLIC IN COLUMBUS

#### 2.4.3 Attendance Figures sorted by Number of Participants

Session Room	Date	Start	End	Code	Session Title	No. of Participants
Hall D	14.08.2016	10:30	12:00	Session 070	Opening Session (SI)	1.726
Hall D	18.08.2016	16:15	17:30	Session 226	Closing Session (SI)	1129
Hall D	15.08.2016	09:30	12:45	Session 092	IFLA President's Session - Answering the Call to Action: How Might We Respond to the Challenges Presented in the IFLA Trend Report (SI)	830
Union Station Ballrooms A/B/C	14.08.2016	08:30	10:00	Session 069	Newcomers Session (SI)	633
Hall D	17.08.2016	16:15	18:00	Session 194	General Assembly - IFLA (SI)	565
Hall D	16.08.2016	08:30	09:15	Session 121	Plenary Session (SI)	528
Union Station Ballrooms A/B/C	15.08.2016	13:45	15:45	Session 105	What comes after the "Third Place"? Visionary libraries - spaces and users - Library Buildings and Equipment (SI)	516
Union Station Ballrooms A/B/C	17.08.2016	09:30	12:45	Session 165	Literacy Matters: Strategies, Awards and Campaigns for Supporting Development Through Literacy and Reading - Literacy and Reading with Libraries for Children and Young Adults, Public Libraries and School Libraries (SI)	440
Hall D	16.08.2016	09:30	12:45	Session 122	Who's in control? Privacy, the Internet and libraries - Committee on Freedom of Access to Information and Freedom of Expression (FAIFE) (SI)	405
C112-115	18.08.2016	13:45	15:45	Session 222	Using social media at work: How to share knowledge, improve collaboration and create a mutual savoir/faire? - Knowledge Management	376
Union Station Ballrooms A/B/C	14.08.2016	12:30	13:30	Session 071	IFLA Market - Current and future of media communications	354
Hall D	17.08.2016	08:30	09:15	Session 163	Plenary Session (SI)	353
Union Station Ballrooms A/B/C	15.08.2016	09:30	12:45	Session 093	Let's make IT usable! Formats, systems and users - Cataloguing and Information Technology (SI)	343

The attendance figures from the IFLA WLIC in Columbus show that our programmes were well attended!

Section	Title	Attendance
Classification and Indexing Section	Access to indigenous knowledge	117
Bibliography Section	Opening the national bibliography	118
Cataloguing Section/IT Section	Let's make IT usable	343

"Let's make IT Usable" ranked 13th in attendance in the whole congress!



Photo: Unni Knutsen



### IFLA HONOURS MEMBERS FOR DEVOTED SERVICE IN THE FIELD OF BIBLIOGRAPHIC WORK

At the Closing Session of the WLIC in Columbus, Ohio, Dorothy McGarry received the IFLA Scroll of Appreciation for her distinguished service to IFLA and global librarianship especially through an outstanding commitment to advancing cataloguing, classification and indexing standards and practices.



Gordon Dunsire was awarded the IFLA medal for his distinguished service to IFLA and international librarianship, advancing the field of bibliographic data, linked data and the semantic web.



Photo and text from: <http://www.ifla.org/node/10818>



### MEMBER SPOTLIGHT

#### CATALOGUING SECTION



**Barbora Drobíková** has been working as the director of the Institute of Information Studies and Librarianship at the Faculty of Arts of the Charles University in Prague (Czech Republic) since 2012 (<http://uisk.ff.cuni.cz>). Her teaching and research topics focus on cataloging matters, library processes and technologies, metadata schemas in digital libraries and related subjects. She has also been working for fourteen years in an academic theological library.



Hello, I'm **Nesrine Abdel-Meguid** and I work at the Bibliotheca Alexandrina.

The Bibliotheca Alexandrina is not only a library, it is dedicated to recapture the spirit of openness and scholarship of the ancient library of Alexandria. It comprises the main reading room, covering 20,000 square meters on eleven cascading levels which can hold up to millions of books, specialized libraries, a copy of the Internet Archive, museums, planetarium, culturama, academic research centers, exhibitions and much more.

I started my career at the BA as a cataloguer as well as a reference librarian at the Bibliotheca Alexandrina since 2001. I received massive technical and managerial trainings in-house, regionally and internationally. This gave me a panoramic overview of the whole book cycle through the different processes till getting the book on the shelf to serve the patrons. In 2010, I was nominated to be responsible for the Non-Arabic cataloguing team; one of its major tasks is the cataloguing of the exceptional donation of nearly 500,000 French books by the Bibliothèque Nationale de France. I am currently managing the cataloguers working on the back-log of books other than Arabic. Furthermore, I am in charge of the quality control and the coherence of bibliographic production as well as the technical training internally and externally.

I am also a member of the team preparing “the International Librarianship Training Program- ILTP” targeting specialized librarians and information specialists in specific topics. I am teaching the Dewey Decimal Classification course which explains the combination of the theoretical approach and the practical application of Dewey classification system.

I have been a member of the IFLA Standing Committee on Cataloguing since 2015 and am currently in my first term. And I just joined the GARR – “Guidelines for authority records and references” revision working group.

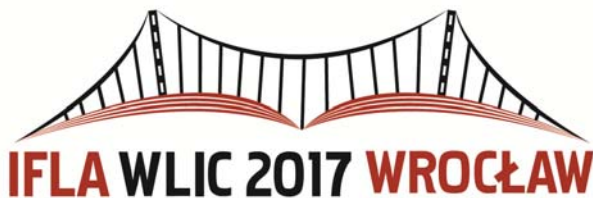
### BIBLIOGRAPHY SECTION



**Rebecca L. Lubas**, Information Coordinator for the Bibliography Section Standing Committee, is the Associate Dean of The Claremont Colleges Library where she works with Information Resources and Systems and Special Collections and Libraries.

Previously, Rebecca was the Director, Discovery, Acquisitions, and Consortial Services at the University of New Mexico Libraries, where she coordinated technical services and the LIBROS Consortium of New Mexico academic libraries. Prior to that, she was the Head of Cataloging and Metadata Services at the Massachusetts Institute of Technology Libraries. Rebecca holds a B.A. from the University of Notre Dame, an M.L.I.S. from Louisiana State University, and an M.A. in English Literature from Ball State University. She is the editor of *Practical Strategies for Cataloging Departments* (2011), co-editor of *Practical Strategies for Academic Library Managers* (2016), and co-author of *The Metadata Manual* (2013) and *The Complete Guide to Acquisitions Management 2<sup>nd</sup> Edition* (2015). Rebecca was awarded a Fulbright Specialist Award to assist the National Library of Kosovo with technical services workflows in 2016.

### NEXT YEAR IN WROCLAW, POLAND



The 83<sup>rd</sup> IFLA WLIC will be held in Wroclaw, Poland on 19-25 August 2017

For an outline of the conference

<http://2017.ifla.org/programme/congress-outline>

Call for papers

<http://2017.ifla.org/programme/calls-for-papers>

Call for satellite papers

<http://2017.ifla.org/programme/satellite-meetings/calls-for-papers-for-satellite-meetings>

Call for posters – deadline 1 February

<http://2017.ifla.org/programme/poster-sessions/call-for-posters>

### RECOMMENDED CALL FOR PAPERS

For more details about dates etc., go to the link to the IFLA web above.

### OPTIMIZING SUBJECT ACCESS TO LEGAL RESOURCES: SOLIDARITY IN DIVERGENCE

The Law Library and the Subject Analysis and Access Sections will be jointly hosting an open session during the 2017 conference in Wroclaw, Poland. We are seeking papers that highlight innovative and effective ways of applying subject access to legal resources. While the session will focus on optimizing subject access to legal information, most

if not all of the program will have broad application to subject access in all types of libraries.

Topics may include (but are not limited to):

- How do libraries work independently or collaboratively, in a local, national or more global scale to improve subject access to legal resources?
- How do they select, adopt, and adapt their legal classification schemes and other means of subject access in response to sociopolitical change, including changes in laws or governance?
- How are differences in legal systems reflected by differences in legal classification and subject headings?
- How can use and reuse of legal classification and subject data be broadened to further assist users as a reference tool?
- What are the challenges of providing multilingual subject access to legal materials?
- What are the unique challenges of subject headings and access for legal resources (for example (for example: Different meaning of same terms when applied to civil law vs. common law systems; law of Europe vs. law of European Union vs. law of European Union countries)?
- What are the applications of linked open data and the semantic web?
- What are the challenges of structuring subject access to legal resources to reflect indigenous and minority cultures and other groups?

**17 March 2017** – Deadline for submitting 800 word proposals for papers and presentations. Proposals may be submitted in English or French. A brief biographical statement of speaker(s) should also be submitted. Information should include: title of presentation; subthemes that it addresses, a short abstract, all authors, noting likely presenter; a brief statement indicating how the proposal addresses the conference theme: Libraries. Solidarity. Society;

institutional affiliations; contact information, including all email addresses.

### CHALLENGING SOCIETY AND NAMING IDENTITY: SUBJECT ACCESS AND BIBLIOGRAPHY IN A MULTICULTURAL WORLD

The Bibliography Section and Subject Analysis and Access Section will be hosting a joint open session during the 2017 conference in **Wrocław**, Poland. We are seeking papers that highlight innovative and effective ways of applying subject access and bibliography in a multicultural context.

#### Topics may include (but are not limited to):

- Multilingual metadata systems and bibliographic data
- Ontologies and schemas
- Multicultural bibliographic services
- The role of national libraries in the 21<sup>st</sup> century

**13 February 2017** – Deadline for submitting 800 word proposals for papers and presentations. Proposals may be submitted in English or French. A brief biographical statement of speaker(s) should also be submitted. Information should include: title of presentation; subthemes that it addresses, a short abstract, all authors, noting likely presenter; a brief statement indicating how the proposal addresses the conference theme: *Libraries, Solidarity, Society*; institutional affiliations; contact information, including all email addresses.

### SHARING IS CARING

The IFLA Cataloguing Section will be hosting an open session at the WLIC 2017 in Wrocław, Poland.

The session is entitled “Sharing is caring” and will focus on information as the foundation on which a

democratic society grows. An important role for libraries is to further the sharing and exchange of data within and outside our sector. In the cataloguing world this means the creation and development of new data models, where entity description gives better opportunities to cluster resources and reuse metadata, ultimately serving the user experience. It can also mean active work with linked data, promoting open data licensing and open source solutions. Metadata is a valuable commodity. To enable its sharing and reuse is both an act of solidarity and a way to make most of our investment.

The planning group is inviting contributions on:

- New data models as a means of furthering the reuse of data
- Use cases on metadata sharing and reuse: between organizations, cross-domain and international
- Linked open data in practice: reuse of library data (authority, subject and bibliographic data)
- Sharing and pooling resources and increase value
- National and international cooperation

**29 February 2017** – Deadline for submitting 400 word proposals for presentations (in English) to [miriam.safstrom@kb.se](mailto:miriam.safstrom@kb.se). Information should include: title of presentation; subthemes that it addresses, a short abstract, all authors, noting likely presenter; institutional affiliations; contact information, including all email addresses. A brief biographical statement of speaker(s) should also be submitted.



The Centennial Hall (Convention Centre)

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## IFLA METADATA NEWSLETTER

The newsletter is published twice a year (June and December).

Contributions are welcome at any time.

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**Ongoing projects,**

**activities, and publications** can be found at:

<http://www.ifla.org/bibliography>

<http://www.ifla.org/en/cataloguing>

<http://www.ifla.org/subject-analysis-and-access>