

## IFLA and some aspects of international interlending.

Rose Goodier: The University of Manchester. Thursday, 27<sup>th</sup> June 2013

### IFLA: A potted history

IFLA is the International Federation of Library Associations. The organization came into being on **September 30th 1927** following the Annual meeting of the UK Library Association in Edinburgh. At this stage, it was called the International Library and Bibliographical Committee. The following 15 countries signed up to be founder members: Austria / Belgium / Canada / China /Czechoslovakia / Denmark/ France / Germany / Great Britain / Holland / Italy / Norway / Sweden / Switzerland / USA Each member country appointed a representative (or representatives) who were selected by their national library association.

The Committee's first plenary session was held in Rome in 1928 and, at that meeting, committee members were assigned various key roles, including Secretary and Chair . Dr Collijn, the Swedish representative, was appointed Chair. Six subcommittees were duly created, dealing with various aspects of librarianship, these being:

- Committee on classification schemes for international use
- Committee on international catalogue rules
- Committee on current bibliographies and on an international code for bibliographers
- Committee on international scholarships, fellowships and exchange of librarians and assistants
- Committee on education for librarianship
- Committee on bylaws for eventual regulations supplementary to the resolutions adopted at Edinburgh

By 1929, another six countries had joined the organization: Denmark, Poland, Estonia, Japan, Latvia and Mexico.

At the 1929 meeting, the name "IFLA" was adopted and the organization has retained this name to the present day. It was decided that this new name was more representative of what the organization stood for, and its increased stature reflected the success of the founding committee. IFLA slowly grew throughout the 1930s and, by 1939 it had representatives from 41 countries. Interestingly Germany and Great

Britain were in regular correspondence and often worked collaboratively throughout the interwar years, but this resulted in an inevitable hiatus in 1939.

It wasn't until 1930 that the subject of international loans began to be addressed by the organizing committee. One of the main issues was the question of payment: who should pay the postal charges – the requesting library or the requester? Participants were asked to compile and keep statistics on international loans. The formal exchange of theses was discussed, and offices were set up in member countries to deal with the organization and coordination of international book lending.

Understandably, the onset of World War Two nearly paralysed IFLA's activities, and during that whole period no international meetings were held, although the members continued to correspond with each other. Face to face communication only resumed in 1947, when the first post-war IFLA meeting was held in Oslo. IFLA's central office was, at that time, based in neutral Switzerland.

One altruistic activity in which IFLA played a strong role during the 1940s was the distribution of books in large quantities to the Prisoner of War and internees' camps. The initiative was directed by the Red Cross with considerable help from both IFLA and the YMCA. The Central Committee's Secretary at the time was based at the League of Nations Library in Geneva and was also a member of the Advisory Committee on Literature for Prisoners of War and Internees.

The 1950s heralded a major reorganization of IFLA, in response to the changing political landscape. At this stage the West European and North American element still dominated the membership.

In 1971, IFLA's HQ moved to the Royal Library – the National Library of the Netherlands – in the Hague. IFLA was continually expanding its membership and its networks with other overarching global organizations such as UNESCO. IFLA is now a huge organization with over 1500 members. With a central office in The Hague, it is truly multifaceted, reaching out to all aspects of the Library profession.

Consult the IFLA website for a list of IFLA's current key initiatives. It consists of a collection of broad headers encompassing the various divisions and sections which form the organization as a whole.

IFLA works collaboratively with a number of important global organizations, the most significant of which are listed here.

**UNESCO – the United Nations Educational Scientific and Cultural Organization.** One of the most important initiatives is the work being undertaken by IFLA and UNESCO on freedom of access to information, monitoring intellectual freedom within the library community worldwide.

**WIPO - The World Intellectual Property organization.** The remit of WIPO is “to promote innovation and creativity for the social, economic and cultural development

of all countries, through a balanced and effective international intellectual property system.” WIPO deals with copyright, patents & standards.

**ISO – the International Standards Organization.** This organization develops and publishes international standards.

**WTO – The World Trade Organization** deals with the global rules of trades between nations.

**FAIFE** is the Committee on Freedom of Access to Information and Freedom of Expression. It was born out of an initiative within IFLA to defend and promote basic human rights, as defined in Article 19 of the United Nations Universal Declaration of Human Rights.

These global bodies have built up close relationships with IFLA over the years and they are making a real difference to communities across the world.

IFLA offers consultative status to several other major organizations. The International Committee of the Blue Shield is one which I consider to be particularly noteworthy of note. Founded in 1996, it works towards protecting the world’s cultural heritage threatened by wars and natural disasters and is sometimes referred to as the “Cultural Red Cross”

IFLA’s modern day collaboration fits with the same kind of ethical tradition as was seen in its earlier work with the Red Cross which took place during the War years. A major ongoing initiative is the advisory and practical work undertaken by IFLA and associated organizations with the provision of aid to Haiti, in the aftermath of the January 2010 earthquake. The supply of books, the protection of documentation and education on preservation are all ongoing concerns.

Professor Shiyali Ranganathan (Delhi University), the creator of the Five laws of Library Science, wrote a paper in 1954 called “IFLA – what it should be and do”. He argued that the membership should be much more representative of a truly global community, advocating that it should consist of: Western Europe and North America 40 % / Asia 20 %/ Eastern Europe, Africa, Latin America, Australia: 10 percent each

Looking at this ratio now, there are over 1500 members, made up of a mixture of institutions, associations and individuals. The ratio looks something like this:

Western Europe and North America: 67% / Asia and Oceania: 18% /Africa: 9%/ Latin America: 6%

Looking at a pie-chart which shows the distribution of membership of IFLA in 2012, we can tell how this fits with Ranganathan’s vision in the 1950s and the answer is: It fits quite well!

Western Europe and North America: 67% (... now 69% ) /Asia and Oceania: 18% (now 15%) / Africa: 9% (... now 9%) /Latin America: 6% (... now 7 %)

The membership consists of a mixture of Association members, Institutional members and personal affiliates. FIL became an institutional member in 2000.

IFLA has a complex structure. The whole structure of the organization was overhauled in 2008. There is an overarching Governing Body of 20 members, with five main operational divisions. Each division is sub-divided into sections and the Document Delivery and Resource Sharing Section, which FIL feeds into, is based in Division 2.

The section which FIL is most concerned with is the Document Delivery and Resource Sharing Section, and the Section Committee is currently represented by myself, although Mark Kluzek is set to take over this role shortly. Previous to my IFLA committee membership, Pennie Street from the University of Liverpool was the FIL representative. The meetings take place at the beginning and end of the IFLA Congress every year. Our current Chair is Mary Hollerich from the Southern Methodist University in Dallas Texas. I was Committee Secretary for a period of four years and I have now handed the baton on to Candice Townsend from the Library of Congress. Our treasurer is Bob Seal from Loyola University in Chicago. Other active committee members include Harald Mueller, from the Max Plancke Institute in Heidelberg, who works in the field of international copyright; Jacqueline Gillet who is based at Inist in Nancy; Pentti Vattulainen, Director of the National Repository Library in Finland; Jenny Raubenheimer from UNISA in Johannesburg and Gunilla Eldebro from the National Library of Sweden. We also have committee members from China, Russia, Norway, Mexico and Australia. Margarita Moreno from the Australian National Library is currently in charge of editing the Model Handbook of Interlending. The 300 section members are IFLA institutional and individual members who have chosen to sign up with this section as a special interest group.

One of the group's main objectives is to extend and improve document delivery and resource sharing through increased collaboration between, and among, libraries and document suppliers. The organization of the biennial ILDS conferences is a significant way of encouraging such cooperation. Committee membership ensures that FIL is represented on an international level and can feed into global decision making on a range of aspects of document delivery.

ILDS is a very important conference in the interlending world, being the leading regular international conference of its kind. This year's conference will be held in Beijing in October and will be hosted by CALIS, a consortium operating out of Beijing with headquarters based at Peking University. It will be called *Global Vision and Local Strategy*. FIL, in recent years has set up a tradition of sending a selected representative member to ILDS. At the last one which was held in Chicago in 2011, Lucy Wilkins from Bristol University was the lucky FIL member whose name was selected to attend. We will asking FIL members for expressions of interest in attending the Beijing ILDS very shortly and FIL will be sponsoring a member to attend.

The IFLA voucher scheme was one of the most important projects to emerge from IFLA. The scheme was originally drawn up by the IFLA Document Delivery and Resource Sharing Committee in conjunction with National Libraries, the British Library being a major player in its inception.

**The history of the IFLA Voucher scheme:** Introduced as a pilot project in January 1995, this scheme is still going strong 18 years later. IFLA's original official HQ for the voucher scheme was known as the "IFLA Office for international Lending" and it operated out of Boston Spa, but has since moved to the Hague.

The two year pilot project initially involved about 20 libraries. Basically, these pioneering libraries bought a pile of vouchers and used them as currency to pay for their international loans. After the pilot scheme had run successfully for two years, the full service was launched in 1997.

**Why was the scheme introduced?** It was set up to address the complexities arising from different currencies being used throughout the world. It instigated a streamlined processes for international interlending. There are lots of benefits:

- It is a simple concept / No bank charges for the requesting or supplying library / Money doesn't get lost in international exchange rates / There is no need for invoices to be generated. This saves on time and admin costs./ You can keep hold of the vouchers and use them in the future/A prolific service provider will benefit from "earning" extra vouchers which can be accumulated and sold back at any time to IFLA HQ

This is how it works:

- The vouchers are purchased in bulk from the IFLA Office in The Hague. Usually a mixture of full vouchers and half vouchers are bought. The vouchers have unlimited validity and can be re-used over and over again. After a minimum of six months, vouchers (regardless of whether they are used or unused) can be sold back to the IFLA office and the money is reimbursed.
- The vouchers are used to pay for international transactions. The lending library quotes a price (for example, three vouchers) and the borrowing library sends them as payment.
- To obtain a refund, vouchers can be sent back to the IFLA office – either because the purchaser hasn't used them, or they have accumulated more than they think they can use.
- Over 70 countries are now listed as participating in the scheme : Participants include most European countries / 5 or 6 African countries, including many of the Francophone African nations, as well as Ghana / Australia and some far-Eastern nations – interestingly, not China.

## **Where do you buy the vouchers?**

You can buy them directly from IFLA HQ. Contact:

Ms Susan Schaepman, IFLA Voucher Scheme, IFLA HQ, PO Box 95312, 2509 CH  
The Hague, NL

Email: [voucher@ifla.org](mailto:voucher@ifla.org) or [susan.schaepman@ifla.org](mailto:susan.schaepman@ifla.org)

Tel: +31 70 3140884

How much they cost. The current price for a voucher is **8 euros**. Half vouchers can be bought for **4 euros** each. And the handling fee for ordering and redemption is **15.50 euros**

**How can you redeem the vouchers?**: Libraries which supply more items than they request can redeem their excess vouchers by sending them to IFLA HQ.

## **The Medieval perspective**

Now let us travel back in time to the Middle Ages and take a quick look at the state of international interlending in its infancy. In Medieval times, handwritten manuscripts were objects of high value; parchment-making was an arduous and expensive business and scribes spent interminable hours on meticulous and often very tedious tasks. Although loaning books was generally regarded as a generous act of mercy, a general wariness prevailed when the topic of lending out materials from monasteries to other non-member communities was brought up.

At the very least, potential borrowers from other institutions were expected to give a valid reason why a particular item should be loaned to them. Here is one notable example which I have uncovered in a text called "The Letters of Peter the Venerable". Peter the Venerable, the 11<sup>th</sup> century Abbott of the Monastery at Cluny in France, asks the Abbott of the Grand Chartreuse (situated in a remote mountain valley a hundred miles to the north of Grenoble) to borrow his copy of *Augustine's correspondence with Jerome*. The reason given? That Peter's copy had been eaten by a bear! Bearing in mind the distance and terrain, this loan would have been no small undertaking and a good reason to borrow would certainly have been required. Sadly we don't appear to know whether the Abbott of the Grande Chartreuse was kind enough to agree to Peter's request.

If a manuscript was borrowed by another institution, the scribes there might well have been asked to make two copies and to donate the extra copy, along with the original, as a means of payment. The process of making unauthorised copies was, even then, very much frowned upon. With this in mind, books were often lent out for pretty long time periods – sometimes from Lent to Lent. In some cases they were loaned for a shorter period.

Fast – forward to modern times. What has changed? International Interlending is still, in many cases, a complex and difficult task. There are still some barriers which must be negotiated. I am now going to ask you all to turn round and speak to your neighbour for 5 minutes with a view to identifying some barriers which need to be taken into consideration when you are borrowing or supplying an item on an international basis. We will summarize these barriers on a flipchart.

### **Barriers to international interlending: Some examples**

**Language:** Requests may be in a foreign language. It may help to know a language other than English, especially if your institution specialises in language courses. However, Google-translate is often a quick and easy way to understand the general meaning of a message. <http://translate.google.com/>

**Locating the item internationally:** It is good practice to check online. For example: National union catalogues / Worldcat / Subito / Email a library to ask them / OCLC

**Ascertaining a means of undertaking the transaction:** By emailing and asking the lender, usually. Are they members of the IFLA voucher scheme? Shares? In the United States, ALA requesting forms are often used between libraries but this method does not work on an international basis. You have to negotiate a means of borrowing with the supplying library. Lending policies, both national and international should be clearly delineated on library websites. This helps when other libraries are hoping to approach you for a loan.

### **Payment mechanisms:**

This is a common stressor.

### **Case Studies**

The Document Supply Unit at the University of Manchester borrowed four reels of Arabic microfilm from an academic library in the USA. The library who lent it was not a member of the IFLA voucher scheme or any of the OCLC interlending schemes and an invoice had to be generated. This meant having to liaise with the Accounts section. We asked if they would accept credit card payment but they wouldn't. It took a long time to get the payment processed. Then, after charging us for the loan, they sent another invoice for twice as much as the loan had cost, to cover postage costs. Again, this took a long time to resolve.

On another note, we asked to borrow a thesis from Macau. The lender didn't ask for a great deal of payment – the equivalent of about £1.00 for a retention copy - but they required payment in Macanese currency. (The Macanese Pataca). Luckily, the student who had asked for the thesis was actually from Macau and was able to

empty his pockets of some small change. We sent the coins over in an envelope and the thesis was duly supplied to us.

**Costs:** Can be high. The BL's scheme, for example, is expensive. Sometimes a lender will send invoices which are costly. Fast delivery methods are often costly. International shipping costs tend to be high. In some cases, though, a supplier may not charge you at all.

There are costs of borrowing /The cost of using some services: e.g BL's worldwide search. Or the fee you have to pay to join Shares. **The cost of postage:** This can be high, especially if you are using courier services and "International Signed For" postal services

### **The cost of replacement if something goes missing.**

#### How to resolve the problem:

- Try and get as much clear information about costs as you can from the lender at the outset.
- If a book is very expensive, beware – if it goes missing you might have to reimburse it.
- Case study: There was one incident at Manchester when we had to pay £400 to replace a book which went missing in the post

**Going astray:** Postal systems vary and items can get lost. We don't have any control over global postage systems. Here are some case studies from Manchester:

Two items were recently packaged together and sent to Ireland. They ended up at a Greek library. The Greek library refused to send them back, either to us or to the Irish Library. Negotiations are still ongoing.

A book from our library was posted out to South Africa. It was addressed properly and was sent as an "*International Signed For*" package. The item was misdirected in the post and was sent to Beijing. It took a further two months to reach South Africa. Then it took a further two weeks to reach its intended destination within South Africa. We haven't got it back yet, although it is now overdue.

We asked for the hard copy of a thesis from Strasbourg. It took a year to get a response from them by email. Then it turned up in the form of two volumes. The post room said that the volumes were too heavy to send back. This caused a problem as one volume was extremely thick, and the other one was thin. We couldn't separate the two. Eventually, negotiating with the post room succeeded in getting the item sent back successfully.

**Copyright and licensing:** These laws apply to all kinds of publication, but especially to e-resources . A very important and vast subject, we aren't going to go into details at this point, but everyone working in the area of international loans must be aware that international copyright laws vary and can be prohibitive.

“What's copyright?” A question that has been asked us quite a few times in the past....

A New Zealand institution once refused to scan a paper and send it to us because some aspects of their copyright restrictions are stricter than ours.

### **Collection care**

Ensuring that the items, as somebody else's property, are cared for properly. Microfilms may have to be inspected before sending them back; Books may have to be kept for Reference Only; Special Collections materials usually have to be handled with great care

**Format:** is sometimes a problem. DVDs have different regional codes according to whereabouts in the world you live, so beware of borrowing a DVD with the *Region 6* code, for example, because this is only playable in China. Most of Europe, including the UK is in Region 2.

Special Collections come under this category too. They tend to require special handling and can often be prohibitively expensive.

**Payment methods:** These differ according to institution and currencies vary, of course. Libraries are free to charge whatever they like for international loans. Some insist on invoicing and this can take up a lot of time and effort. It also means having to liaise with various financial offices.

**Loan periods:** International Loan periods vary. Often an extended loan period is granted to the international borrower (as indeed happened in medieval times). At Manchester we usually give them a couple of months.

### **Cultural and organizational differences**

Some libraries are quicker to deliver than others. They may have larger teams and interlending may be considered to be more of a priority in some places than others. Also, some countries are equipped with a more effective infrastructure than others. In a few cases, the library who wants to borrow the book has asked for it to be sent to them without payment and this may cause a problem for the lender.

For more information about IFLA, take a look at the IFLA website: <http://www.ifla.org>

