The Politics of Libraries and Librarianship

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The Politics of Libraries and Librarianship: Challenges and realities

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He has a keen interest in the development of information technology for public use, having been involved with the development of computer systems to support cultural heritage and learning since the mid-1970s. He continues to lecture in many countries around the world and has written many books and papers.

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From 1988 to 2007 he was dean of Library Services at the Henry Madden Library, California State University, Fresno. From 1977 to 1988 he worked at the Library of the University of Illinois as, successively, director of Technical Services, director of General Services and acting university librarian. From 1966 to 1977 he was, successively, head of cataloguing at the British National Bibliography, a member of the British Library Planning Secretariat and head of the Office of Bibliographic Standards in the British Library. He has taught at library schools in Britain and the USA – most recently at the GLIS at Dominican University in the Chicago area. Michael was president of the American Library Association (ALA) in 2005–2006. He is the first editor of the first two editions of AACR2 and the author of a number of books.

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Marian Koren studied Dutch and international law at the University of Utrecht, and specialised in human rights at the University of Strasbourg. She also studied Swedish and children's literature at the Universities of Amsterdam and Uppsala. On 20 November 1996, the International Day of the Rights of the Child, she took her PhD in law at the University of Amsterdam. She has been working for the past 30 years at the Netherlands Public Library Association, involved in strategies and policies, user-oriented projects and children's services, in a research and international orientation. She has held positions in a number of international bodies, publishes in various journals and is a guest lecturer at universities and schools for higher education. As current head of the Bureau for Research and International Affairs, she continues to elaborate on the research presented in her book *Tell Me! The Right of the Child to Information* (NBLC, The Hague, 1996).

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Denise Nicholson has a BA degree and higher diploma in library science from the University of South Africa (UNISA). She has also passed two WIPO/UNISA copyright modules – 'Essential Copyright Law' (2005) and 'Internet Aspects of Copyright and Trademarks' (2006). She is currently the copyright services librarian at the University of the Witwatersrand, Johannesburg, where she has been employed in different positions since 1983.

Denise has been very active in South Africa and in other parts of Africa in addressing copyright and access to knowledge (A2K) issues. For her efforts, she was awarded 'The Academic Librarian of the Year' for 2001 by the Library Association of South Africa and SABINET Online. She promotes open access and continues to campaign for more balanced and appropriate copyright laws for developing countries.

Denise is a member of a number of international, regional and local copyright committees and/or access to knowledge projects. She spearheaded the establishment of the African Access to Knowledge Alliance, which is currently involved in the African Copyright and Access to Knowledge research project. She is the dissemination and policy engagement adviser for this project, which involves a comparative study of copyright laws of eight African countries, including South Africa. Denise has presented at many conferences, written a number of publications and contributed to various international and local research reports, position papers and policy documents on copyright. She provides an online information service on copyright and other topics relating to access to knowledge. She was the first librarian from a developing country to attend the WIPO General Assembly in Geneva in 2006, where she presented a joint statement on 'Libraries and the Development Agenda' on behalf of IFLA and eIFL.net.

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Victoria Okojie is president of the Nigerian Library Association, and sees the position of being president of a national library association as a major role model for people entering the profession and those already

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Victoria graduated in 1980 with a BEd degree in geography from the University of Benin, Nigeria. She later obtained an MLS and an MSc (geography) in 1983 and 1991 respectively from the University of Ibadan, Nigeria. She started her career as a librarian in the University of Ibadan and moved on to become the area director of the British Council, Ibadan. She is currently engaged in consultancy work in the library and information services sector.

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Albie Sachs received a card from his father on his sixth birthday, during the Second World War, expressing the wish that he would grow up to be a soldier in the fight for liberation. His career in human rights activism started at the age of 17, when as a second-year law student at the University of Cape Town he took part in the Defiance of Unjust Laws Campaign. Three years later he attended the Congress of the People at Kliptown, where the Freedom Charter was adopted. He started practice as an advocate at the Cape Bar aged 21. The bulk of his work involved defending people charged under racist statutes and repressive security laws, many of whom faced the death sentence. He was raided by the security police, subjected to banning orders restricting his movement and eventually placed in solitary confinement without trial for two prolonged spells of detention.

In 1966 Albie went into exile. After spending 11 years studying and teaching law in England, he worked for a further 11 years in Mozambique as a law professor and legal researcher. In 1988 he was blown up by a bomb placed in his car in Maputo by South African security agents, losing an arm and the sight of an eye. After recovering from the bomb he devoted himself full time to preparations for a new democratic constitution for South Africa.

During the 1980s, working closely with Oliver Tambo, leader of the ANC in exile, he helped draft the organisation's Code of Conduct as well as its statutes. In 1990 he returned home, and as a member of the Constitutional Committee and the National Executive of the ANC took an active part in the negotiations which led to South Africa becoming a constitutional democracy. After the first democratic election in 1994 he was appointed by President Nelson Mandela to serve on the newly established Constitutional Court.

In addition to his work on the court, Justice Sachs has travelled to many countries sharing South African experience in healing divided societies. He has also been engaged in the sphere of art and architecture, and played an active role in the development of the Constitutional Court building and its art collection on the site of the Old Fort Prison in Johannesburg.

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Kerry Smith joined Information Studies at Curtin University of Technology as a lecturer in February 1991, after a ten-year stint as a special librarian in the minerals and petroleum industries in Perth, Western Australia. Her early interest in the open access facility of the internet manifested itself in June 1996 when she took on the position of editor-in-chief of the electronic journal *LIBRES*, an open access refereed journal in library and information studies research, and recently in her coordination of a virtual commons titled RIC – Researching the Information Commons.

Kerry has found the politics of libraries and their issues of enduring interest. She has been national president of the Australian Library and Information Association and has sat on its General Council, spent eight years as a local government councillor in Western Australia in her spare time and is now on the IFLA Education & Training Standing Committee, having spent the previous eight years as secretary, president and then a member of the IFLA Standing Committee on Library Theory & Research.

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Winnie Vitzansky is the director of the Danish Library Association. She is a trained librarian and before taking up her position in the association she was director of the Danish National Library for the Blind. Winnie has extensive international experience: she was a volunteer librarian in Tanzania, and took up active participation in IFLA in 1979, becoming chairman of the Section of Libraries for the Blind in 1983. Ever since then, Winnie has been a member of IFLA standing committees. Her IFLA activities now mainly concentrate on the Management of Library Association Section as well as IFLA/FAIFE and ALP. She is also actively involved in the work of the European library association, EBLIDA.

Winnie's main professional focus is on giving all citizens free and equal access to information and culture. In a changing world this requires various transformations in library services, and this process of transformation is dependent on motivated and involved politicians to support (and finance) the changes.

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List of acronyms

A2K	access to knowledge
AAKA	African Access to Knowledge Alliance
AGOA	African Growth Opportunity Act (USA)
ALA	American Library Association
ALIA	Australian Library and Information Association
ALM	archives, libraries and museums
ALP	IFLA Action for Development through Libraries programme
ANC	African National Congress
ARIPO	African Regional Industrial Property Organization
BAI	Book Aid International
CAP	Consumers Association of Penang
CI	Consumers International
CILIP	Chartered Institute of Library and Information Professionals (UK)
CLAIM	CROP Library and Information Management Working Group
CROP	Council of Regional Organisations in the Pacific
EBLIDA	European Bureau of Library, Information and Documentation Associations
EFTA	European Free Trade Association
eIFL.net	Electronic Information for Libraries Network
EPA	economic partnership agreement
ETDS	electronic thesis and dissertation system
ETF	Education Trust Fund

List of acronyms

A2K	access to knowledge
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CROP	Council of Regional Organisations in the Pacific
EBLIDA	European Bureau of Library, Information and Documentation Associations
EFTA	European Free Trade Association
eIFL.net	Electronic Information for Libraries Network
EPA	economic partnership agreement
ETDS	electronic thesis and dissertation system
ETF	Education Trust Fund

FAIFE	IFLA Free Access to Information and Freedom of Expression programme
FLA	Fiji Library Association
FTA	free trade agreement
GATS	General Agreement on Trade in Services
GATT	General Agreement on Tariffs and Trade
GDP	gross domestic product
HECS	Higher Education Contribution Scheme (Australia)
ICT	information and communications technologies
IDRC	International Development Research Centre
IFLA	International Federation of Library Associations and Institutions
IIS	Institute of Information Scientists (UK)
IK	indigenous knowledge
ILFA	Inspiring Learning for All
IPO	Inter Provinciaal Overleg (Association of Provincial Authorities) (Netherlands)
IPP	Instituut voor Publiek en Politiek (Dutch Centre for Political Participation)
IT	information technology
LA	Library Association (UK)
LAA	Library Association of Australia
LDF	Library Development Funds
LIASA	Library and Information Association of South Africa
LIC	Library and Information Commission (UK)
LIS	library and information studies
LMPL	Leading Modern Public Libraries Programme (UK)
LRCN	Librarians' Registration Council of Nigeria
LRRT	ALA Library Research Round Table
LSF	Library Service of Fiji
MBA	master of business administration

MLA	Museums, Libraries and Archives Council (UK)
NBD	Netherlands Library Service
NBLC	Netherlands Public Library Association
NUC	National Universities Commission (Nigeria)
OAPI	African Intellectual Property Organization
OCW	Ministry of Education, Culture and Science (Netherlands)
PARBICA	Pacific Regional Branch of International Council of Archives
PBC	provincial library centre (Netherlands)
PIALA	Pacific Islands Association of Libraries and Archives
PIC	Pacific Information Centre
PIMRIS	Pacific Islands Marine Resource Information System
PPP	public-private partnership
PPP	purchasing power parity
PRIDE	Pacific Regional Initiatives for the Delivery of Basic Education
PSO	provincial service organisation (Netherlands)
RIC	Researching the Information Commons
RQF	research quality framework
SACU	Southern African Customs Union
SADC	Southern African Development Community
SCECSAL	Standing Conference for Central, Eastern and Southern African Library Associations
SCOPAL	Standing Conference of Pacific Libraries
SPC	Secretariat of the Pacific Community
SPC	South Pacific Commission
TPM	technological protection measure
TRIPS	WTO Agreement on Trade-Related Aspects of Intellectual Property Rights
UBA	United Bank for Africa
UCV	unimproved capital value
UN	United Nations

UNESCO	UN Economic, Social and Cultural Organization
UNISA	University of South Africa
USP	University of the South Pacific
VNG	Association of Netherlands Municipalities
WCT	WIPO Copyright Treaty
WIPO	World Intellectual Property Organization
WSIS	World Summit on the Information Society
WTO	World Trade Organization
WWW	World Wide Web

Foreword
The wondrous depths of libraries in South Africa

Albie Sachs

Libraries are supposed to be boring and conferences are supposed to be even more boring, so imagine a conference on libraries…

On 1 October 1963 I was entering the building in which I practised as an advocate, going to what we called my chambers, when suddenly about ten burly plain-clothes policemen just emerged as you see in the movies, from behind motorcars and pillars, and placed me under arrest under what was called the 90 Day Law.

You are in solitary confinement: no access to lawyers, colleagues, to family, to anybody. Alone, in a concrete cube with just yourself. Staring at your toes, staring at the wall, at your toes, at the wall. All the ordinary things of life, the communications with people, the books that you read, the activities you normally have, are forbidden, stripped away. And in order to survive I invented a kind of encyclopaedia of memory and I can recall trying to remember all of the states of the USA, and starting with the 'A' – Alabama, Arizona, Arkansas – and getting up to 42, 43, but I couldn't write down the names. I had two hands then. I would try to remember ten and another ten. And I started singing songs to create a world of activity, of meaning, and I would go through the alphabet always and create quite an interesting little catalogue of what were the popular tunes in October 1963, and I still recall singing to myself, 'I'll be living here always, year after year, always, in this little cell, that I know so well, I'll be living swell always, always', and I would turn around and be rather amused that this song by Irving Berlin made famous by Noël Coward's upper-middle-class comedy of manners was somehow supporting a young idealistic revolutionary in South Africa. 'I'll be staying in always, keeping up my chin always. Not for but an hour, not for but a week, not for 90 days, but…… always.'

Human beings are not built to be alone. It is not just fun to read, to be in touch with others, it's a need, a necessity. The only book I was allowed was the bible and I would read it religiously, but not as a religious person. I'd read it, I would ration myself, for just so many pages every day so that I wouldn't get through it too quickly because this was an endless period. You could be detained for 90 days and another 90 days and another 90 days.

And one day the station commander came in looking very flustered with a big piece of paper in his hands, and he said 'Yeah, if they'd listened to me this would never have happened', and I am trying to read that piece of paper because when you read the bible it goes down in columns, and this writing went right across the page, and I'd forgotten how to read right across the page. And it said:

> In the Supreme Court of South Africa, Cape of Good Hope, Provincial Division [and the same in Afrikaans], in the case of Sachs versus Rousseau [and I can't quite make out what's going on and it mentions the names of two judges]. It is hereby ordered that the applicant be allowed reading matter and writing material.

I'd raged against the legal system until then. What does it mean that people under the law can be locked up for ever in solitary confinement with nothing happening? Now the legal system was the most magnificent thing that had ever existed, in the whole of human history!

And this is where the connection with the conference emerges. I was to be allowed to read books. How to get them?

The security police said we can't allow his friends to send books in because they will have all sorts of coded messages. And in the end the arrangement was that I would write on a piece of paper the books I wanted to read and it would be taken to the nearby library.

And I still try and imagine the excitement, the consternation, the surprise of the local librarian. A policeman, probably not being too well educated, asking to read *Remembrance of Things Past* by Marcel Proust, *Don Quixote* and *Moby Dick*. I loved *Don Quixote*, especially the second part with the idealist always getting up from the dust to mount his horse again. But the book that made a huge impact on me was *Moby Dick*. Now imagine when you have been locked away from books and suddenly you can read, and these are books that I'd been postponing reading for ages and ages and now I had the time. And in that extraordinary, lonely situation words were my only communication with the world outside. That marvellous tale of these crazy people on the boat hunting the white whale just assumed enormous proportions in my

mind. And I remembered so vividly two stories about swimming: one was when Pip fell overboard and went down deep, deep, deep, deep into the ocean to wondrous depths and he saw amazing things as he swam around there and he was never quite the same again. And then Melville describes other people going swimming upon the ocean and they were always swimming around and around the boat. They would never go out far and come back. They would swim round and round the boat. And that image of the two swimmers has remained with me for the rest of my life. The wondrous depths of knowledge, exploration, going beyond yourself; and the same circumnavigation, sticking to what you know.

Now the address that I'm giving you is dedicated to that librarian: the unknown librarian. I don't know if it was he or she, probably she, who provided me with these marvellous books. She never knew she was doing it, but she was saving me. Without those books I would not have survived my detention. I would have come out at the end but my spirit and soul would have been destroyed. So it was a librarian quite unwittingly, like so many librarians in so many parts of the world, simply doing his or her job by providing a resource, a bit of illumination and access to a world that otherwise might never exist. It is something very wonderful; it is something very precious, something magical that your profession does, and I feel very happy to applaud you and pay tribute. If I had two hands I would clap them together: to you as librarians.

And the other theme that emerges is circling round the boat safely, doing what you do, doing it well, doing it better all the time; and going down to the wondrous depths. And we have to circle round the boat. We have to make our libraries better. We have to collect better, we have to conserve better, we have to catalogue better and we have to do better all those things that libraries traditionally have done. But we also need to be going to the wondrous depths. And there are to me three wonders that are perhaps specially relevant here in South Africa today.

The libraries that walk around on legs, that's the first one. They are our people and their memories: the knowledge they have in their heads, the experiences that they have lived through, experiences that were transmitted to them by their parents and grandparents. Perhaps one is more aware of it because we still live in a society where oral culture is so profound and meaningful. Perhaps one is especially aware of it because the literary culture, official culture, was so distorted, so false: it either mythologised events, activities, history, or it lied, or it simply left out the great majority of people. They were just left out of the record and the stories. It's not simply that people could not get into the libraries because they were segregated. Their stories couldn't get into the libraries, their

experiences didn't get into the libraries, their history didn't get into the libraries, their languages weren't recognised by the libraries, their struggles were not recognised in the libraries. And so their oral traditions and the memories people have are immense treasures that must not be hidden away like buried gold somewhere to disappear and be rediscovered centuries later. These treasures need to be revealed and appreciated today.

We find it in our work. It's not simply honouring people who have been dishonoured, of doing justice to the past. It's necessary for the vitality and the functioning of society today. I see it in our books. We deal, for example, with customary law. Customary law is part and parcel of the law of our nation. It has the same role as common law. It's an independent source of law with enormous meaning to millions of people. And yet customary law written down in the books by the old native affairs officials, formulating it in their own way, frequently gives a very distorted, often invented, version of the law as practised by the people. We have living customary law today. And if I go to the libraries of Johannesburg I can't find materials on living customary law. It's just not there. We don't have the methodology of recording. We don't have the forms of classification, of telling the stories that are necessary for the work that we do today.

We are going through an extraordinary transformation that seems like a miracle to the world out there. We know it's not a miracle. Miracles are not made of meetings, with minutes and matters arising. We have millions of meetings. (And I thought when we got freedom there would be no more meetings!) Meetings are the stuff of miracles: we need to meet to decide how to capture the wonderful stories that need to be told. So that is the libraries on legs. We've got to find ways and means of ensuring that these extraordinary memories are appropriately recorded.

Then there are libraries as havens… Somebody may be living in a shack with only candlelight, or in a house possibly with electricity, but the families are crowded into just two rooms and the television is on. You can't study. You can't read. You can't reflect. You can't converse with others like yourself. The library becomes a place of illumination, of safety. The library becomes a place where you meet with other people like yourself, maybe called sissies and nerds because you read and you study when you could be kicking a football around. And football is fantastic. It's not a choice between one or the other. But it is a place where people can gather. And to me what warms my heart, hearing about this marvellous programme of creating community libraries, is to have that place of security and of meeting, and a place where you can dream and imagine and converse and a place where you can converse in your own language; where hopefully books in your own language and other tongues are available. So that you

don't have to regard yourself as literate only if you speak English, or speak with a good accent in English, which can be so inhibiting and destructive of self-confidence and self-expression in our country.

The third one is to me is the most amazing of all. It is the library you can't see. It is the library in a little microchip. It's the library that's completely transforming the libraries in our country. And it's wonderful; it's threatening; it's baffling. I try to keep up, and there is always something new and it's iPod and it's broadband and it's Skype: it's a this and a that and the other. I think of our Constitutional Court library. It started with nothing. 1994. Nothing. Not one book, not a bookshelf. And the marvellous thing about starting with nothing is that you can invent yourselves. You can decide on your priorities. You can create in your own vision in terms of your own priorities what it is that you want.

We now have what we claim to be the biggest human rights library in the southern hemisphere. I'm not sure what the High Court in Australia would say and we are not competing with you on this one. And much of it has been donated. We've had support from foreign governments and various international pro-library agencies. But for me what's been so special are two aspects. The first is the physical character of the building. One of my colleagues said to the architects: 'The most marvellous things we do in a library is to take out a book, you read something, it leads to the next book and to the next and to the next, and if you can wander around freely instead of having to take a lift or walk up stairs it somehow adds to your journey. It celebrates your journey.' And the architects moved from building a library on floors to a library based on a ramp system. And the ramp is useful not only for people to move like that, but to make it look as though knowledge is floating. That ideas are there, waiting for people to access them.

The second feature of our library is its virtual capacity. That's something we've been doing fairly recently and we are now preparing to have six dedicated people working there who will receive enquiries from all over our country – judges, magistrates, professionals and others – for information which they could never get otherwise. They can't come to Johannesburg. It would be difficult to give cards to everybody going through the stacks anyhow. And most of the information now is not in hard physical form. It's in virtual form. But the part that makes all of us feel especially elated is that it will serve the whole of Southern Africa. We are linking up with judges and law librarians in the whole of Southern African – what we call the SADC region. They will send in their judgments to us. We will communicate our judgments and the opinions of our courts to them. We will make available all the journal articles we have in our country, together with access to materials from all over the

world. And in a world where the internationalisation of forms of discrimination is taking place, resistance to discrimination and ideas of equality and human dignity are also becoming globalised, and resistance to forms of inequality and indignity is becoming globalised. Where constitutions speak about fundamental rights of everybody, it's so important to know what legal thinkers – progressing advanced legal thinkers in other parts of the world – are doing. And in particular for us in Africa it is vital to know what like-minded people in other parts of our continent are thinking and how we all are dealing with similar problems, how we articulate, how we express ourselves. So the dialogue and communication become rich. We don't have to go to London, we don't have to go to Paris. We don't have to go to Washington, although it's wonderful if we do go there and there is nothing iniquitous about doing so. And people from there are coming to us. But we communicate among ourselves, and without the mediation that you often get when you have to communicate through the prism of the thinking and the ways of imagining and projecting cases that others have.

Our library is becoming now a central feature of our court, together with the artwork of the building. We deliberately chose to place our new Constitutional Court in the Old Fort Prison of Johannesburg building. We wanted to say: we don't forget the past. The past happened and the past is still with us in so many of the injustices and inequalities that continue in our society. But we don't remain trapped in the past. We take the negativity, we remember the pain, and we transform the negativity into positivity, into hope. It becomes an energy form for us. The whole building becomes a national project, and right at the heart of that national project is the library.

I wish the conference every success. You will notice the Constitutional Court choir plays a very active role. I am not sure if there is another court in the world which has a choir. I am not sure if even the Ministry of Arts and Culture has a choir. But it's all part and parcel of the same thing. It's knowledge; it's ideas; it's justice; it's freedom; it's a sense of humanity and dignity. All these things come together in the work that we do and the wonderful work that you are doing. Thank you.

Acknowledgements

Justice Albie Sachs first presented this as the keynote address to the IFLA Conference, Durban, South Africa, on 19 August 2007.

Preface
The politics of libraries and librarianship: challenges and realities

Many of us who have worked in libraries large and small, and/or been associated with professional groups, know that politics is everywhere. Yet in my experience as an educator in library and information studies (LIS) for some years, politics[1] is seen as a dirty word and treated with some disdain. Some of my students have even been heard to comment: 'I didn't come to library school to learn about this. I want to be a librarian.' I have long wished to see a collection of papers on the topic, and when none came forward after the collection of Herb White's papers in his own book (White, 1989), I decided to collect them myself.

We can see from papers appearing in the LIS literature that libraries do indeed operate in a political framework, and the types of political environments are many and various. The IFLA president for 2007–2009, Claudia Lux, has chosen 'Libraries on the Agenda' as her presidential campaign, where she is giving top priority for the concerns and needs of libraries to be on the agendas of governments and local policy-makers.

The contents of an edited book like this are only as good as the chapters in it. This is entirely dependent on one's success in convincing, cajoling and pleading with colleagues. The one frustration in not being able to secure papers from corporate library colleagues was more than compensated for by the contributions you have before you. And while a book like this is planned, there was one occasion that leapt before me: when I heard Justice Albie Sachs speak at the opening of the International Federation of Library Associations and Institutions (IFLA) Conference in Durban, South Africa, in August 2007. His is not a corporate library approach, but his story is compelling reading. I am most pleased to be able to include his words as the Foreword to this book.

I would like to thank all of the contributors for their hard work. It is not easy to arrange such a collection, and it is not easy for these busy

people to make a commitment to assist and then sit down and do it. Many are colleagues from IFLA conferences, and this has enabled a more global approach to the topic. I have left the chapters very much as individual pieces and simply standardised things like spelling, punctuation and referencing style. Hence there are wide variations in authorial style across the book compared to the more consistent 'voice' one gets in a normal academic book.

Here are their stories.

Note

1. *The Macquarie Dictionary* (1990: 731) definitions include: 'The science or art of political government; AND the use of underhand or unscrupulous methods in obtaining power or advancement within an organisation.'

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1

An international political framework for libraries

Alex Byrne

The first decade of the twenty-first century looks very similar to the last decade of the twentieth century. We still have gross inequities between rich and poor nations. Rich nations are still concerned about energy security and poor nations about obtaining greater opportunities for their peoples or, for the poorest, overcoming starvation and disease. We still have political division and military conflicts in the Middle East and other regions. We have a growing apprehension of environmental damage and the catastrophic consequences of global warming, but have not yet managed to take internationally concerted action to avert it. In the library and information domain, we still have inequities in library provision and information access within and between nations; we are still concerned about the rising cost of library materials; and we continue to be worried about our relative lack of influence.

But there are significant changes in context, needs and opportunities for libraries and information services. Long-heralded globalisation has arrived. It has been creeping up on us since the telegraph enabled almost instantaneous global communication a century and a half ago, and since steamships, canning and freezing permitted the new agrarian revolution which shifted much agricultural production to poorer and more distant lands as metropolitan nations focused on industrialisation, followed by their shift to post-industrial economies and the consequent relegation of polluting and labour-intensive industries to aspirational 'newly developed' nations. Globalisation has been a long process, but the turn of the millennium has seen a sea change in its character and effect. The well-known quip on sensitive interdependence, 'Does the flap of a butterfly's wings in Brazil set off a tornado in Texas?' (Lorenz, [1972] 1993: 181), is daily exemplified. We see the interconnectedness of our

globe demonstrated in many ways, including, dramatically, the greater frequency of severe weather events, as for example when Hurricane Katrina, fuelled by higher than normal temperatures in the Gulf of Texas, battered and submerged New Orleans and surrounding areas. And, in the library and information field, we saw it when the publication of some cartoons by a Danish newspaper led almost immediately to riots and attacks on embassies in Middle Eastern cities (Sturges, 2006).

An issue for libraries

In the cartoons affair we can see some of the big contemporary global issues in microcosm. The circumstances achieved global recognition but should be briefly retraced. The editor of a Danish newspaper, *Jyllands-Posten*, became aware that some illustrators were reluctant to illustrate a children's book dealing with Islam. To expose the issue, he commissioned several cartoonists to satirise Islamic topics. The cartoons were published and received some negative comment from members of Islamic communities in Denmark, principally because some depicted the Prophet Mohammed – who, in Islamic tradition and belief, should not be graphically portrayed. The cartoons were then reprinted in a Norwegian publication. News of the cartoons was communicated to imams in several Middle Eastern nations, who expressed outrage and inspired crowds to riot and attack Danish and Norwegian embassies. Subsequently, the Danish editor was investigated by prosecutors and an Iranian exhibition displayed cartoons which satirised Jewish and Christian topics, to little comment (Slackman, 2006).

This became an issue of freedom of expression versus sensitivity towards religious sensibilities. It was interpreted in terms of the thesis of Huntington's (2002) *Clash of Civilizations*, and was portrayed as a confrontation between a secular, democratic, tolerant 'West' based on Christian values and a fundamentalist Islamic, autocratic and intolerant 'Orient'. The anger unleashed in Middle Eastern streets was linked to the 'war on terror' proclaimed by US President George W. Bush after the 11 September 2001 attacks on the World Trade Center and Pentagon – and accepted by many pundits as evidence of the need for that 'war'. From the perspective of those who were outraged by the cartoons, their publication and republication represented a gratuitous offence against the revered founder of one of the world's great monotheistic religions – not fair comment or academic analysis, but a crude and slanderous misportrayal. The rapidity with which the riotous protests were initiated

and escalated showed the underlying sense of disadvantage and injustice which could be rapidly exploited by unscrupulous religious demagogues. Most of those they incited to action could not have seen the cartoons, but demonstrably could be moved to violent rage by being told that they slandered the Prophet Mohammed.

For libraries and their global organisation, the International Federation of Library Associations and Institutions (IFLA), it was an issue to be addressed because of the centrality of intellectual freedom to library and information practice. Those who had been offended by the cartoons called for their suppression – which, if carried out fully, would have meant not only that they should never be republished but also that the copies of the newspapers in which they had been published should be removed from libraries or at least censored, and copies placed on the internet or elsewhere should be removed. In other words, the cartoons should be expunged from the documentary record.

This raised important issues of principle for librarians. Even many librarians who may have felt that the newspaper editor's actions had been gratuitous were concerned that the library mission of 'keeping the record' must not be compromised. To enable librarians from many countries and different perspectives to air their views, IFLA's Free Access to Information and Freedom of Expression programme (IFLA/FAIFE) hosted a debate on this issue at IFLA's annual conference, the World Library and Information Congress in Seoul in August 2006 (Sturges, 2006). A broad spectrum of views were aired in a most respectful manner during the debate. They extended from passionate defences of intellectual freedom to thoughtful comment on the dangers posed by hate speech which, as has been experienced in many countries, can lead to violence and death.

Civil society

The civility of that debate at the 2006 World Library and Information Congress demonstrated the values of librarianship and the crucial importance of values-based professionalism to effective dialogue in international affairs. The respect for others and their views, even those with whom protagonists did not agree, which was evident during that debate is fundamental to civil society. But also evident was the commitment of participants to the professional responsibilities which librarians share with archivists and other cognate professions to 'keep

the record'. The most passionate defenders of freedom of expression assumed that libraries should collect and make available the cartoons and any other publications which might be considered objectionable by some in their communities or beyond. And those who were most troubled by the offensiveness and potential for harm presented by the cartoons were also concerned that the responsibilities of libraries should not be compromised through such episodes.

The furore sparked by the publication of the cartoons and the subsequent IFLA/FAIFE debate vividly demonstrated the important role played by libraries as institutions of civil society. It is their maintenance of the record of human observations, imagination, analysis and opinion which allows a truly civil society to flourish. There can be no tyranny when all members of a society can check the record to remind themselves of the sequence of historical events and, in the operation of the polity, of the promises which were made and honoured or made and put aside. A community can be described as a civil society when it operates according to rules and norms through which both the autonomy of individuals and their collective interests can be balanced, with differing views respected and effective mechanisms to establish generally agreed directions for the betterment of the community. Central to this process is accurate information, information which can promote wise decisions by permitting the consequences to be well assessed. The information is seldom complete and is often contested, at least in interpretation, but it is certainly better to take decisions in the light of information about the issues and their possible consequences than in ignorance or through prejudice, self-interest or the corrupt use of power. This process of informed decision-making lies at the heart of the operation of civil society, and therefore the information-purveying institutions – including the mass media, libraries, archives, museums, universities – are central to civil society.

Although records were kept in the earliest civilisations and well-developed informational systems underpinned the great empires, the importance of well-informed decision-making became more evident in the nineteenth century as nations industrialised and the Western idea of the nation-state took its now predominant form. The accumulation and management of data and information gained greater importance as it became essential to the operation of national and emerging multinational enterprises and systems.

But the importance of information was not just instrumental, a tool to make the 'trains run on time', but was increasingly seen to be necessary to a free society. In that civil society, it was held that individuals should

be free from any constraints on using reason to solve religious, social and political problems. Knowledge would lead to truth and optimum outcomes for society and the individual. Thus, in a civil and free society, citizens 'are deemed competent to decide *rightly*' (emphasis added) (Polanyi, 1962: 223) and governments would accept the freely obtained consensus. The capacity for decision-making by the citizens of the society depended on access to information and the views of others, so their freedom to enquire had to be necessarily accompanied by freedom of expression, as Mill ([1859] 1974: 138) noted:

> No society in which these liberties [of expressing and publishing opinions] are not, on the whole, respected, is free, whatever may be its form of government; and none is completely free in which they do not exist absolute and unqualified.

The development of Weberian bureaucracy in those emerging industrialised societies led to a greater concentration on gathering information, applying it in administration and recording the decisions. This was nicely satirised by Dickens ([1857] 1953: 518) in *Little Dorrit* when he had the 'right honourable Barnacle' defend from attack the Circumlocution Office's 'work of form-filling, corresponding, minuting, memorandum-making, signing, counter-signing, counter-counter-signing backwards and forwards, and referring sideways, crosswise, and zigzag'. Procedurally focused as it may have been, the increasing adoption of this mode of administration across the world joined with the data needs of industry and trade to change society profoundly. No longer was sufficient information for living conveyed through almanacs and folk tales: the increasing complexity of society demanded that more data and information must be gathered and converted to knowledge to enable its effective operation.

The place of libraries

Modern libraries, especially modern public libraries, developed in response to this need. Expectations for this new type of library were outlined the UK Public Libraries Act of 1850: to promote education, provide suitable recreational opportunities and foster moral improvement (Murison, 1988). This 'poor man's university' enabled individuals to promote themselves across social trajectories. The library offered stories of achievement to inspire ambition, and also an

opportunity to acquire some of the skills and knowledge required to attempt to achieve the ambition. Further, the library changed the operation of society significantly by providing a 'time machine' through which communities could visit and learn from the experiences and ideas of others from other places and other times.

Complementing the newspapers of that time, and the mass media of today, libraries provide access to information through which individuals and communities can place observations and events in context and can consider possibilities identified by others. The whole apparatus of the modern library – its collections, databases, networked services, expertise, etc. – are organised around the goal of providing access to information. Some of the information is delivered 'just in time' with an emphasis on contemporaneity and relevance, especially in corporate information services, while other resources are kept and preserved to maintain the record of human investigation and invention in case of potential interest, as in the large research and national libraries' collections. Ultimately, the system succeeds when an individual or group finds the information they need to understand an issue or to support or disprove a theory. In achieving that goal, library and information services serve society. Further, by serving individuals and groups without bias and without favouring the powerful, they serve civil society. They help individuals and groups to discriminate information which is useful – even if the use is in itself frivolous – and so enable the individuals or groups to 'decide rightly' for themselves.

An information society

This need for discrimination has become even more critical in a world which is awash with information and data, as it is in the twenty-first century. Not only do we have a vast and rapidly growing creative literature, but it has been joined by the rapidly burgeoning scholarly publications and vast stores of data on our activities, the weather, the oceans and innumerable other areas of interest. This is not to mention the mass media's ceaseless broadcasting and rebroadcasting of programmes which transmit out through the solar system electromagnetic encapsulations of successive repeats of *I Love Lucy* and other expressions of the human imagination.

It is the reality of the information society that not only do we have an information economy, an economy that is driven by information and in

which information has become the most valued and valuable commodity, but we are also subject to virtually unbounded record-keeping. Every time we swipe our credit cards, are photographed walking down a street, are clocked along a toll road or have our activities recorded in many other ways, we are reminded that we live in an information society. Much of that information, whose accumulation would put the Circumlocution Office to shame, has its uses. Primary uses of course include payment for goods or services that we consume, but desirable secondary uses might include delivering additional benefits to us (e.g. easy monitoring of expenses, loyalty reward schemes) and facilitating efficient production and supply chains. But at the same time, the data logging exposes us to unwanted and often invisible surveillance.

For these reasons, the growth of the information society has been accompanied by an enormous expansion in legal instruments to regulate and control information flows. New and expanded laws extend from those which aim to protect the individual's interests, such as privacy legislation, to those which are intended to protect the community, such as anti-terrorism laws which often override traditional protections of the individual. They are joined by ever more elaborate and ever more restrictive intellectual property laws, which have been occasioned by the commodification of information and recognition of its crucial value as an asset – perhaps, today, *the* most valuable asset – which is essential to business success.

In this information society, paradoxically, it is becoming more difficult to 'decide rightly' for oneself because of the big interests involved. Much that is done in the name of national security for our protection is, we are told, too sensitive for us to be informed about. Much that government and big business wish to do is similarly shrouded in secrecy for reasons of commercial confidentiality; confidentiality which on later examination proves too often to hide doubtful relationships of patronage or corruption. Investigative journalists can help expose such deals, but generally long after the damage has been done.

Libraries in the information society

Consequently, there is a need for institutions of integrity, institutions which inspire trust in providing access to information. Libraries have that status, earned because of their long history of collecting and making available information resources without bias. They are a trusted source

of information and a valued mechanism for fostering education and building social capital. This is demonstrated in many countries – not only those with a strong library tradition, such as the Nordic nations, but in countries with weaker or damaged economies which are seeking to rebuild them, such as Afghanistan.

But libraries are not inviolate. Together with other institutions and community and organisational services, they must continuously justify their existence and ongoing support. Libraries need to be in a position to resist glib suggestions that they are unnecessary in the age of Google, in a time in which so much information can be found so easily via the internet. Libraries must reassert their status as trusted sources of 'good information' – that is, trusted sources of information of known provenance and reliability which will assist citizens to 'decide rightly'. In doing so, libraries must demonstrate their relevance to their clienteles, to those by whom or for whose benefit they have been established. Public libraries must have a clear sense of the communities they serve, especially in these times of growing pluralism in most communities around the world. They must provide the information resources and services which build social capital in their communities, including that which will promote reading and children's development, education and the growth of self-knowledge, the effectiveness of business and government, and the interests of the elderly and those with personal enthusiasms. Academic libraries must similarly meet the needs of their clienteles by supporting learning, teaching, research and scholarship. And there must be similarly clear goals for all the specialised types of libraries and information services.

This agenda positions public libraries as institutions that help redress the balance in information power between individuals and communities on the one hand and governments and big business on the other. They are institutions which have at their heart the liberties of which Mill wrote, institutions which are committed to making accessible opinions as well as knowledge irrespective of the views of the librarians about that which they make available. To be true to that goal of providing unrestricted access to information, they need have an absolute and unqualified commitment to intellectual freedom and the interests of their communities. They should not, for example, be hesitant to provide access to information concerning the possible environmental or health dangers posed by an industrial plant just because the industry is a major employer in their locality.

For other types of libraries, a similar ethic prevails but it is focused around the purposes for which each library was established and the clientele it serves. An academic library, for example, must make available from its own collections or by drawing on the resources of other libraries

all that is necessary to enable researchers to investigate and students to learn without hindrance. This might include making available information which is otherwise restricted – the reason why Australian university libraries objected so strongly to the forced removal of two books from the University of Melbourne Library because they were considered likely to promote terrorism (Council of Australian University Librarians et al., 2006). In assisting students and researchers, librarians should help them to find all relevant information, whether it supports or contradicts a hypothesis and regardless of whether it might be considered objectionable. It is not our job to judge the information, except to the extent that we help to assess relevance and quality.

A corporate library might be expected to have a narrower scope, since it exists to support the activities of the commercial or governmental organisation for which it was established. However, the same ethic prevails: it is necessary to provide all relevant information, and not only that which supports a particular argument or the interests of the powerful. This ethic is more than a pious exhortation by idealists who are unused to the ways of business and government: it flows from the core principles of good governance. If ministers of government, directors of corporations and others who are responsible for making decisions do not take steps to ensure that they are properly informed, they can be culpable if the organisation causes harm to its clients, staff, investors or the general public. By extension, if information specialists do not ensure that full information is available to the decision-makers then they may be complicit in wrong decisions and possibly vicariously culpable.

Thus, the responsibilities of libraries and librarians have become weightier in the information society. It is no longer possible to be passive keepers of the record; it is now necessary to become engaged. We need to be involved with the big issues confronting our nations, communities and organisations or we will be judged irrelevant. If we do not work actively to provide the information which will assist our clients to understand the consequences when a butterfly flaps its wings in Brazil – whether that might be the effects of global warming, the HIV/AIDS pandemic or a fall on the Shanghai stock exchange – we are neglecting our responsibilities.

Becoming engaged does not mean that we must become partisan, except in our commitment to the provision of good information (i.e. relevant, authentic, authoritative) and to operating information services which merit trust. It does not mean that we become environmental or AIDS activists or, indeed, that we adopt any particular causes, however popular they may be or whether we might consider them to be consistent with our personal beliefs and priorities. But it does mean that we operate

as responsible information professionals by taking an active stance in regard to making available appropriately relevant and, as far as possible in the circumstances, comprehensive information so that our clients – current and future – will be in a position to assess fully the issues on which they need to 'decide rightly'.

Nor does becoming engaged require us to confirm the veracity of the information to which we provide access or which we actually supply. Verification would take us beyond our abilities and our professional responsibility. We can, and should, be in a position to express professional judgements about provenance and, to a degree, authenticity and authority, but we do not have the disciplinary knowledge to judge accuracy in content or interpretation. It is our responsibility to transmit the knowledge through time and from place to place without distortion or wilful bowdlerisation, at least on our part. It is the responsibility of researchers, scholars, policy analysts and others to test, verify and challenge it.

Consequently, we will have fulfilled our responsibilities and could not be considered negligent or complicit when we have provided, to the best of our ability and to the limits of available resources, relevant and complete information on a topic without suppression or distortion. This is a sufficiently weighty expectation of the profession – an expectation whose fulfilment can place us in conflict with the powerful as well as demanding the application of all our professional skills to identify that which may be relevant.

The responsibility to be actively engaged joins our long-term goals involving the preservation and transmission of memory, self-education, community well-being and supporting knowledge creation. It presents an agenda for the information society in the twenty-first century. This is an agenda that is consistent with the outcomes of the World Summit on the Information Society, which noted the importance of libraries in its declarations and plans but went on to identify a broad range of goals that need to be addressed if we are to develop an information society for all (IFLA and Byrne, 2004). They include the alleviation of poverty in fulfilment of the UN Millennium Goals, the promotion of literacy and education, and the advancement of the marginalised and underprivileged, including women and girls, among many others. Connecting to that global programme ensures that libraries are relevant in the twenty-first century but also raises expectations of how they should perform. Meeting those expectations demands that libraries operate within an international political framework which will promote their value and ensure that they deliver effective services and outcomes in areas which are important.

Library ethos

The framework which emerges from these considerations is one that builds on the traditional commitment of libraries and librarians to keeping the record, to the accurate transmission of information through time and across space. This is an ethos which is particularly consistent with the Universal Declaration of Human Rights Article 19:

> Everyone has the right to freedom of opinion and expression; this right includes freedom to hold opinions without interference and to seek, receive and impart information and ideas through any media and regardless of frontiers. (United Nations, 1948)

It is an ethos which upholds the duality of the right to know: both *seeking* and *imparting* ideas and opinions, both freedom of access to information and freedom of expression. It is a position which is consistent with the underlying principles of the Universal Declaration, the principles of respect for the autonomy of all people.

This values-based foundation for the international framework was adopted by IFLA when its new statutes were endorsed in 2000. They include the following statement of values:

- the endorsement of the principles of freedom of access to information, ideas and works of imagination and freedom of expression embodied in Article 19 of the Universal Declaration of Human Rights;
- the belief that people, communities and organizations need universal and equitable access to information, ideas and works of imagination for their social, educational, cultural, democratic and economic well-being;
- the conviction that delivery of high quality library and information services helps guarantee that access;
- the commitment to enable all Members of the Federation to engage in, and benefit from, its activities without regard to citizenship, disability, ethnic origin, gender, geographical location, language, political philosophy, race or religion. (IFLA, 2000)

Similar values have been adopted by other library associations, including the Australian Library and Information Association, as can be seen from the codes of ethics assembled on the IFLA/FAIFE webpages (www.ifla.org/faife/ethics/codes.htm). The codes are intended to provide

ethical frameworks for the members of the library associations that have adopted them, and thus help members deal with difficult issues such as the Danish cartoons affair. In providing that guidance, they meet one of the essential criteria to justify librarianship's claim to professional status.

But the agency of the values embedded in the codes extends beyond the regulation of the behaviour of library and information professionals. Being substantially rights-based and built around international instruments and their translation into national laws, their agency positions librarianship in a particular place in the organisation of society as a corps of professionals concerned with the proper management and use of information. In an information society that is a most significant place to occupy, and consequently gives the profession's members a significant set of responsibilities which are no less weighty than those imposed on medical professionals by their privileged control over human health or engineers in their design of structures and systems which we use daily. The responsibilities to hold, preserve, transmit, make available and assist the use of the record of human imagination, invention and experience are an important core around which our techniques and practices have developed and which warrants our status as information professionals.

In providing an ethical basis for library and information practice, therefore, our shared values also provide a foundation for our influence in and on society. They offer a foundation for political action, not in the narrow party political sense, but in the sense of action within the body politic, within civil society.

Seeking political influence

A key strategy is to forge alliances and partnerships. One which deals with an especially difficult area is the International Committee of the Blue Shield, which was established under the Hague Convention to work to safeguard cultural heritage in times of conflict (www.ifla.org/blueshield.htm). The challenges it faces have been graphically demonstrated over the period leading up to and since the invasion of Iraq. Conscious that the land of Iraq contained some of the earliest archaeological sites in the Middle East as well as more recent monuments and important libraries and archives, the Blue Shield expressed concern that such important heritage would be protected in the event of an invasion. UK Prime Minister Blair among others reassured questioners that heritage would be protected. In the event, it was not. US forces stood by while the National Museum was looted and the National Library burnt

(Shimmon, 2003). Despite this unwelcome result, the tragic events and the heartening subsequent assessment of the damage and support for recovery by the Blue Shield and many individual organisations (see www.ifla.org/blueshield.htm#Reports) demonstrated the importance of the alliance between the peak bodies for libraries, archives, museums, audiovisual collections and monuments and sites.

Happier outcomes were experienced during IFLA's interventions in the preparatory phases and summit meetings of the World Summit on the Information Society (IFLA and Byrne, 2004). In that extended four-year campaign, IFLA worked closely with some of its member associations, sympathetic government delegations and other non-government organisations with similar aims. The campaign achieved recognition in the summit documents of the issues of importance to the library and information sector, not solely because of IFLA's efforts but because of the very successful alliances and partnerships displayed in the process – relationships which were generally characteristic of the civil society sector in the summit processes.

Among the important relationships which bore fruit during the summit process was IFLA's alliance with the International Publishers' Association. It was built on the trust between the two peak organisations which developed through determined collaboration via a joint committee. Through that collaboration, the relationship moved from mutual suspicion to finding common cause in a number of areas of shared interest while accepting that there were other areas in which the views of the parties would continue to differ. In the summit process, both recognised that they would be more effective in working together on shared agendas, providing a good example of a means of enhancing capacity to seek to achieve political influence.

As the summit experience also demonstrated, sufficient numbers of well-prepared and committed agents are vital to a successful campaign. For IFLA's summit project, the necessary corps was supplied by the IFLA leadership, key staff from IFLA headquarters and some national library associations and a number of volunteers, especially a team of Swiss librarians who were important because many of the meetings were held in Geneva. It was important that they should be well prepared and supported so that they might take advantage of opportunities to influence. Achieving an effective corps of agents requires strong commitment from members and the capacity to involve sympathisers who might not be members, or, in other words, being in a position to widen the support base.

And seizing opportunities is essential because political processes are fluid and ever-changing. Seeking influence is a question of obtaining the right combination of issue/s, target audience/s, argument/s, proponent/s, supporting voices and opportunity. Political awareness enables

opportunities to be identified so that the campaign may be planned and resources marshalled. This requires a sensitive understanding of the ways in which the political climate might affect decision-making.

An international political framework for libraries

Many of the aspects illustrated through the examples explored above are standard elements of political work for non-government organisations, and particularly for professional associations. However, the particular societal role and standing of libraries and the challenges of globalisation demand that they be combined into an international political framework for libraries if libraries are to obtain the influence which is required to create the conditions needed to achieve their mission. The necessary international political framework combines the elements described above together with an understanding of the socio-political drivers for change and a multilayered international library structure so that influence may be sought at the appropriate level.

Where political action might once have been taken primarily by national and regional associations within their national or local polities, globalisation now requires an approach which is simultaneously broader and more nuanced. The arenas in which influence must be exercised are many and varied. Privacy, for example, operates at personal levels when there is information about us that we do not want shared, while there may be community information which is commonly known within a community but which should be kept private from others – an issue of particular importance among indigenous peoples. Organisations may have established data protection and other policies to safeguard privacy, often to satisfy legislative requirements. At the national level, most jurisdictions, at least in developed nations, have passed privacy legislation which may have been designed to be consistent with transnational protocols (as in the European Union) or international treaties and conventions. Some of the information safeguarded through such practices, policies, laws and conventions falls outside the ambit of libraries, but much is included in the information resources we collect or the user data we manage. Consequently, libraries have a vital interest in the development of privacy regulation, but that interest cannot simply be advanced at one level. It may, for instance, require engagement with an indigenous community to understand and respect their beliefs and practices, or it might require

lobbying the European Commission in regard to its Privacy Directive to prevent the imposition of undesirable requirements on national legislatures. Working at these multiple levels demands an understanding of the various political contexts in which a specific library or libraries in general operate and the means to engage with and hopefully influence the relevant governmental agencies and political agendas.

That action must take place within the appropriate socio-political context: local, regional, national, transnational or global. So the next element of an international political framework for libraries must be a structure which will facilitate action at the appropriate level. This is offered by the tiered structure of professional organisations in the field, with IFLA operating at the global level, bodies like the European Bureau of Library, Information and Documentation Associations (EBLIDA – www.eblida.org) operating at the transnational level, national associations at the national level and state or regional associations or divisions of national associations working at the regional and local levels. Their work is complemented by the sectoral focus of specialist associations (e.g. Special Libraries Association) and issues-based committees or other bodies (e.g. eIFL, Australian Libraries Copyright Committee).

Thus the international political framework for libraries is based on their representative structure and strengthened by partnerships, alliances and supporters. Many of the examples discussed above are drawn from the experience of IFLA working at the global level, but have engaged or been complemented by the work of transnational, national and specialist organisations as well as partnerships with representatives of cognate fields. In the circumstances of the emerging global information society, the library and information profession needs that global reach but also needs issues to be tackled at other levels. Action at multiple levels can often be complementary, enhancing the overall impact, while at other times it is better to focus on the most appropriate level because pressure at the wrong level can invite a backlash.

An effective framework for political action brings together an appreciation of the issues, a firm foundation in values, key resources and the capacity for action at the appropriate level. That nuanced capability enables libraries and associated agencies to work together to respond to the economic, legal and political issues of a globalised world, to deal with the obfuscations of the Circumlocution Office and sensitively identify which flaps of the butterfly's wings may be significant for the effective prosecution of our responsibilities. Harnessing that capability will increase our influence and enable us to address the inequities in library provision and information access within and between nations.

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2

Intellectual property – benefit or burden for Africa?

Denise Nicholson

Introduction

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

South Africa is classified as a 'developing country' by the World Intellectual Property Organization (WIPO). Although it has a high-tech, developed dimension, it has a much larger 'third world' or 'developing' dimension, where half the population lives below the poverty line (*The World Fact Book*, 2005). There is a high level of illiteracy; 40 per cent unemployment seriously affects development; 54 per cent of the total adult population has not completed a general level of education (Statistics South Africa, 1998); while 42.5 per cent of the total population are under the age of 19 years.[1] Access to information and education is vital for South Africa and the region. However, serious socio-economic factors, together with restrictive intellectual property laws, hamper the process. If South Africa, 'the powerhouse of Africa' and the most developed country in the continent, is burdened with such problems, consider how much greater the problems are for the rest of Africa.

What is intellectual property?

Intellectual property refers to creations of the mind and is divided into two categories: industrial property, which includes inventions (patents), trademarks, industrial designs and geographic indications of source; and copyright, which includes literary and artistic works such as novels, poems, plays and computer programs, films, musical works, artistic works

such as drawings, paintings, photographs and sculptures, and architectural designs. Rights related to copyright include those of performing artists in their performances; producers of phonograms in their recordings; and broadcasters in their radio and television programmes.[2]

Intellectual property situation in Africa

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

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

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

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

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

Importance of access to information

Article 19 of the UN Universal Declaration of Human Rights[3] states:

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

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

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

> Freedom, prosperity and the development of society *depend* on education, as well as on unrestricted access to knowledge, thought, culture and information. This right to intellectual freedom is essential to the creation and development of a democratic society. The state of intellectual freedom in libraries is an important indication of the progress of democracy in a nation. (IFLA/FAIFE, 1999: 1)

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

> Knowledge is not a commodity, and can never be one. Knowledge is the distillation of human endeavour, and it is the most profound collective good that there is… Education must embrace the intellectual, cultural, political and social development of individuals, institutions and nations. This 'public good' agenda should not be held hostage to the vagaries of the market. (Quoted in Asmal, 2003)

Copyright – a barrier for education and libraries

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

- As sheet music may not be copied at all, a lecturer applies for permission to copy a few pages of music for a small group of students. The rights owner demands a high fee and lays down restrictive conditions. The lecture is delayed, and finally the lecturer has to use alternative material. Not surprising if he does not apply next time!
- A distance learner has to pay high copyright fees for all his study material, as there are no copyright exceptions. Unlike many developed

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

- Copyright law prohibits a blind student from converting his textbook, or even a portion of it, into a more accessible format, e.g. Braille. He tries to access an electronic book, but copyright technological protection measures block the 'text-to-speech' software. He tries to download an electronic article from an electronic database to e-mail, but the licence prevents this, so he is unable to access the information via a voice-synthesiser. He cannot browse in the library, since there are no facilities or legal provisions for him to convert even a small portion of an article into Braille. Copyright protection measures prevent him from exercising his fair use rights.
- A deaf person has signing as a first language, Zulu as a second language and English as a third language. She needs to translate and adapt information from various works, before converting it into a more visual format for study purposes. Copyright law prevents her from making any translations, conversions or adaptations before obtaining copyright permission and paying royalties. More broadly, copyright affects translations into indigenous languages. A third of the world's languages are spoken in Africa (Languages of the World, 2005). Consider, then, how copyright restrictions hamper translation and exchange of information for research and teaching purposes on the continent!
- A librarian is restricted from digitising a valuable collection, which is fast deteriorating in condition, as copyright clearance is necessary for each item. Some rights owners are untraceable, some refuse permission, some charge high fees or lay down strict conditions. Should copyright restrictions lock up this valuable knowledge indefinitely?
- Unfortunately, due to lack of resources, a library can only purchase one or two copies of well-used books. This means that thousands of students will use and no doubt damage these limited resources, since they are unable to buy them for themselves. The copyright law prohibits the library from preserving the original by reproducing extracts or a section of a book for users to work from (even if the material is for a short-term study assignment).
- The spread of HIV/AIDS in sub-Saharan Africa has far exceeded the worst projections. It has retarded the transformation from illiteracy to literacy. The lack of access to information and education has been one

of the major factors in the spread of this disease, and the pandemic itself has affected education in a very serious way. Making multiple copies of extracts or articles from copyrighted works is prohibited by copyright law. In such a catastrophic pandemic, surely the nursing sister wanting to disseminate vital information to health workers and other relevant groups should be exempt from having to apply for copyright permission and pay licence fees? The urgency and need to distribute essential information for the public good *surely* outweigh commercial interests?

- A rural teacher knows her class cannot afford the high fee to copy a few plays, and they have no library, so she copies them anyway. She believes (rightly or wrongly) that cultural development in a developing country far outweighs the commercial interests of a multinational publisher that would not have had a sale anyway, because the price of the originals was excessive.
- Forty-three per cent of government schools in South Africa do not have electricity.[4] Only 19.8 per cent have libraries or media centres (South Africa Department of Education, 2000). The figure is far less in other African countries. The majority of schools, libraries and resource centres are poorly resourced. High book and journal prices, exchange rates and taxes make the acquisition of textbooks virtually impossible. Photostatted material provides an alternative for teachers and learners. However, copyright laws are very restrictive with regard to reproductions for teaching or library purposes.
- In rural areas oral communication is the main source of information, but the print medium is essential for advancement in literacy and education. A literacy facilitator therefore offers reading lessons to illiterate people in a shanty town. These people have no fixed addresses, so they cannot borrow from the downtown library. There is no electricity available, so they cannot make 'fair use' copies for themselves in terms of the copyright law. Copyright law prohibits her from making multiple copies for them at the downtown library. It also prevents her from making translations, adaptations or derivative works which would be appropriate for different age groups and different levels of literacy. These people can barely afford food and clothing, let alone pay for expensive books or copyright royalties. So what choice does she have? Make copies and modify works to educate, or perpetuate illiteracy?
- Differences in copyright laws, copyright awareness and compliance also make cross-border exchange of information extremely difficult.

If a healthy bank balance is the only key to new and varied information, how will African people ever progress from illiteracy to literacy? How will they ever help their countries move from the status of 'developing' to 'developed'?

Where is the balance?

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

a) The purpose of intellectual property laws is to enhance creativity and innovation;

b) All intellectual property rights must be measured against the public interest;

c) The public interest requires a balance to be struck between the monopoly rights implicit in intellectual property laws and the free competition that is essential for economic and creative vitality. (Royal Society for the Encouragement of Arts, Manufactures and Commerce, 2005)

The society also calls upon governments to adopt the Adelphi Public Interest Test, as follows.

a) There must a presumption against extending intellectual property;

b) Change should be allowed only if it is shown to bring economic and social benefits;

c) The burden of proof must lie with the advocates of change;

d) Throughout there must be wide public consultation and a comprehensive, objective and transparent assessment of the costs and benefits. (Ibid.)

The WIPO Copyright Treaty also recognises the need to 'maintain a balance between the rights of authors and the larger public interest, particularly education, research and access to information' (WIPO, 1996).

So where is the balance?

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

IFLA (2000) states that 'overprotection of copyright could threaten democratic traditions, and impact on social justice principles… If copyright protection is too strong, competition and innovation is restricted, and creativity stifled.' In fact, too many restrictions may just be encouraging non-compliance.

Copyright – benefit or burden?

Is copyright a benefit or a burden? Clearly, it is a burden for African countries. It is not working for Africans, but it is definitely working for developed countries. It has become a sophisticated income-protection mechanism for rights owners, particularly foreign corporations. Rights owners claim that copyright encourages creativity and provides an income for local authors. Yet the main beneficiaries of copyright are foreign publishers, not authors or Africans. In South Africa, apart from textbook authors, who can earn up to 25 per cent royalties on retail sales, authors can earn 8–12 per cent royalties, depending on various factors.[5] However, in practice most authors earn less than 9 per cent royalties on sales and very little on copyright reproduction fees. This is hardly an incentive to encourage creativity.

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

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

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

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

If copyright is serving its true purpose, why do developed countries constantly challenge it so vigorously? It is not surprising, then, if it is not working in the developing world.

International pressures

Despite the burden of inappropriate and restrictive domestic copyright laws, African and other developing countries have to adhere to very strict copyright rules and regulations through international agreements, which developed countries like the USA, Britain and Japan did not have to do when they were in the developing stages. In fact, these countries actively used subsidies and protective tariffs to protect their infant industries, at the expense of other countries (South Centre, 2002). This situation is analogous to developed countries 'kicking away the ladder' from developing countries which they themselves used to climb to the top (Chang, 2002).

Developing countries are net importers of intellectual property. South Africa's research output, for example, is only 0.5 per cent of global research (Paterson, 2005). It is less in other African countries. These countries are dependent on advanced countries for the bulk of their research and educational material.

Many African nations were pressured into signing international intellectual property agreements even before some developed countries signed them. The USA refused to sign the Berne Convention when it was growing its publishing industry; in fact it benefited greatly from other countries in the process. Only in March 1989, when it became a net exporter of intellectual property and began to derive huge economic

benefits from it, did the USA become a signatory to the Berne Convention. Now it dictates how the rest of the world should protect and manage intellectual property.

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

The TRIPS Agreement is one of the most significant achievements of the Uruguay Round of the General Agreement on Tariffs and Trade (GATT). Signed by 124 nations, together with other multilateral trade agreements and the agreement establishing the World Trade Organization (WTO), TRIPS is the first comprehensive intellectual property agreement ever executed by most of the world's trading nations. It is an international treaty which prescribes minimum standards for most forms of intellectual property regulation, including copyright, within all WTO member countries.[6] It also encompasses the clauses of the Berne Convention. TRIPS is legally enforceable and subject to the WTO dispute settlement system. Non-compliance can result in serious trade sanctions. The adopted standards mirror those in force in the industrialised countries. Developing countries therefore have to assume the heavy burden of introducing substantial intellectual property rights reforms (Correa and Yusuf, 1998: 93). The cost of implementing TRIPS is beyond most of these countries' economic means. They are constantly monitored by industrialised countries, and blacklisting is always a threat.

If that is not enough, some African countries are now being pressured to sign the General Agreement on Trade in Services (GATS) (WTO, 2001a), as well as economic partnership agreements (EPAs) and free trade agreements (FTAs) with industrialised countries, e.g. the USA, the European Union and others. The US and EU FTAs, as well as the EU EPAs, contain an intellectual property chapter, hereinafter referred to as TRIPS-Plus. 'The TRIPS-Plus concept covers both those activities aimed at increasing the level of protection for right holders beyond that which is given in the TRIPS Agreement, and those measures aimed at reducing the scope or effectiveness of limitations on rights and exceptions' (Musungu and Dutfield, 2003). These FTAs also force countries to ratify or accede to several other intellectual-property-related agreements, even if they have not reached the developmental stages to cope with these additional responsibilities and financial burdens.[7]

Developing countries had until 2006 to ensure that their intellectual property laws are TRIPS-compliant. It is not clear how many countries

are TRIPs-compliant at this stage. Least-developed countries have until 2013 to provide protection for trademarks, copyright, patents and other intellectual property under the WTO agreement. However, least-developed countries will not have to protect patents for pharmaceutical products until 2016 (WTO, 2005). By adopting TRIPS-Plus this whole process would be fast-tracked, causing even more socio-economic problems for these countries.

In recent years Morocco,[8] Jordan,[9] Bahrain,[10] Chile,[11] Thailand,[12] the Republic of Korea[13] and some Central American states,[14] as well as Australia[15] (a developed country), have succumbed to this pressure and adopted the TRIPS-Plus provisions in free trade agreements with the USA. They have all landed up with much stricter copyright laws.

For some time the Southern African Customs Union (SACU) (consisting of South Africa, Namibia, Swaziland, Botswana and Lesotho) has been engaging in FTA negotiations with various developed countries, e.g. the USA and the European Union. The SACU is also engaging in multilateral and bilateral agreements with other developing countries, including the Latin American trade bloc Mercosur, India and China.

The SACU countries succeeded in excluding the chapters on intellectual property, investment and competition from the agreement with the European Free Trade Association (EFTA), consisting of Iceland, Norway, Switzerland and Lichtenstein (*Sunday Times*, 2005). But the agreement that was of most concern to SACU countries was the US FTA, since the USA was pressing for negotiations to be finalised by the end of 2006. Various consumer groups and the educational sector in South Africa made submissions to the South African government, objecting to the inclusion of TRIPS-Plus and other controversial clauses in any of the free trade agreements. Fortunately, the SACU countries decided not to sign the US FTA.

These countries are now having to contend with pressure from the European Union to include TRIPS-Plus provisions in an economic partnership agreement currently under negotiation.

African Growth Opportunity Act – stepping-stone to a free trade agreement?

Do African countries need a free trade agreement with the USA? This is debatable, since many of them already enjoy duty-free markets for 95 per cent of their exports through the African Growth Opportunity

Act (AGOA), which is a unilateral piece of legislation passed by the US Congress in 2000.[16] To date, the USA has designated 37 countries for duty-free tariff treatment for certain products. These countries must have established, or be making progress towards, a TRIPS-compliant intellectual property regime. If these requirements are not met, they could be blacklisted or expelled from AGOA (International Intellectual Property Alliance, undated).

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

Lack of permanence and constant monitoring of participating countries, however, perpetuates dependence on the USA. AGOA is an obvious stepping-stone to a free trade agreement which would bind countries to a more permanent partnership with the USA. Countries could lock in AGOA benefits, boost confidence and attract foreign investment. However, unless an FTA accords developing countries the right space to respond, first and foremost, to their fundamental developmental needs, this step should not be taken, since poverty and inequality would just be intensified (Ong'wen, 2004).

What is a free trade agreement?

By definition, a free trade agreement is a contractual arrangement which establishes unimpeded exchange and flow of goods and services between trading partners regardless of national borders (Fedex, undated). As previously mentioned, the US and EU agreements contain a TRIPS-Plus chapter which far exceeds all current international obligations for all types of intellectual property. It promotes the controversial US Digital Millennium Copyright Act, the Sonny Bono Copyright Extension Act and aspects of the EU Copyright Directive.

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

and restrictions which are especially intended to promote the public interest.

Multilateral trade negotiations through the WTO have become more complex, since developing countries have far different interests to those of the industrialised nations. Each round takes much longer to negotiate. By pursuing FTAs outside this forum, developed countries can aggressively drive their global trade policies. The assumption is that what they do not get in multilaterals, they will get in bilaterals.

Harmonisation versus competition

Developed countries promote TRIPS-Plus as a necessary mechanism for global intellectual property harmonisation. However, harmonisation to date has been very limited. The USA and the European Union may have the same copyright term, but their copyright laws are far from harmonised. As just one example, the European Union has strong protection of authors' moral rights, while the USA does not. In the US-Australia FTA there has not been harmonisation of, for example, the periods covered by copyright extension, fair dealing versus fair use, standard of originality and moral rights issues.[17]

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

Agricultural and other trade benefits come with a high price tag for developing countries desperate to enter global markets. They become pawns in the 'carrot-and-stick' games played by rich countries. Such unequal bargaining power can result in significant restrictions remaining in place, e.g. the European Union's controversial agricultural policy and the US anti-dumping policy. Rich countries promote free trade, yet jealously protect their agricultural markets, where developing countries

clearly have a comparative advantage (Tayob, 2005: 2). This so-called 'global harmonisation' can best be described as 'Americanisation', 'Europeanisation' or a form of 'knowledge colonialism or imperialism'.

Even though TRIPS-Plus provisions are strongly criticised by their own citizens, especially in the USA, developed countries craftily entrench their TRIPS-Plus regimes through bilateral trade agreements with other countries. If developing countries negotiate disproportionate concessions in bilateral agreements, it may be difficult to rectify the situation multilaterally in the WTO talks. They will no longer have anything of substantial interest to trade away in exchange for the removal of the remaining significant barriers by developed countries (US Congressional Budget Office, 2003: 8).

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

What is of concern is that FTAs might divert the world away from multilateral trade liberalisation and lead to the development of large, competing trading blocs such as the USA and the Western hemisphere, the European Union and nearby countries, and Japan and its trading partners in Asia and the Pacific Rim – a result that would be inferior to multilateral free trade, and detrimental to developing countries (ibid.).

Unfortunately, governments negotiate free trade agreements behind closed doors, with little if any input from other stakeholders. The contents are confidential and therefore not in the public domain. It is believed that the FTAs offered to African countries are based on the controversial US-Australian FTA, signed in 2004. This agreement has been strongly criticised by educators and librarians in Australia, a developed country but a net importer of intellectual property (Joint Standing Committee on Treaties, 2004; Senate Select Committee, 2004; Senate Legal and Constitutional Legislation Committee, 2004; Rimmer, 2004a, 2004b: TR49–69, 2004c).[18]

Would a similar agreement be fair for developing and least-developed countries in Africa? How could African researchers, teachers and librarians accept an agreement which would clearly exacerbate the problems of accessing information and exchanging knowledge on the African continent? The USA is a major global exporter, while Africa as a whole accounts for less than 2 per cent of global trade (*Sunday Times*, 2004). The percentage is far less in the SACU countries. How could this possibly be an equal partnership?

Impact of TRIPS-Plus on African countries

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

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

Large foreign corporations would have control over knowledge and cultural heritage for a further two decades. Consumers would have less material to use and 20 more years' royalties to pay, mainly in foreign currency. The outflow of money would be detrimental to the economies of African countries, all net importers of intellectual property. The increased costs would place a huge financial burden on already under-resourced educational institutions.

Public access to books, films and music would be limited for a far longer period. Works that should already be in the public domain would come under protection for that extended period. The burden of copyright regulation would extend to works whether or not authors wanted them further protected or commercially exploited. Since only about 4 per cent of copyrighted works more than 20 years old are commercially available, this would lock up 96 per cent of twentieth-century culture to benefit 4 per cent.[19] This would clearly shrink the public domain.

Creative authors would have far fewer works to use as building blocks in making new creations. The creation of new works is dependent on a rich and vibrant public domain. Problems in accessing and exchanging information, particularly for educational purposes, would be exacerbated. TRIPS-Plus makes no distinction between research, education and entertainment, so dead authors, film-makers and songwriters would all be given an extra 20 years of control over their works – indeed from the grave (Australian National University, 2004).

Copyright law is a barrier to digitisation projects in educational institutions, libraries (including legal deposit libraries) and archives, as adaptations and conversion to a new format require copyright clearance for every item. Copyright clearance is time-consuming and tedious, especially when rights owners are difficult to trace. If permission is denied, there

would be gaps in collections and access to these valuable works would not be possible. An extended copyright term would therefore have additional administrative and major financial implications for these institutions.

Only 8 per cent of South Africans have access to the internet (World Wide Worx, 2007). Only 12.3 per cent of government schools have computers for learning purposes (South Africa Department of Education, 2000). These figures are much lower in other African countries. TRIPS-Plus provisions would therefore impact significantly on the small percentage of Africans who have access to electronic media, as the availability of online material would be significantly reduced or blocked.

In the case of computer software, even more so than literature, music, films and television, the length of time for which copyright would subsist under TRIPS-Plus would absurdly exceed the period for which it would be commercially useful (ILaw, undated: 3).

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

Anti-circumvention technologies

The TRIPS-Plus provisions in the US-Australia FTA propose anti-circumvention measures that exceed countries' obligations as laid down by WIPO. Ironically, these measures were strongly objected to when they were included in the US Digital Millennium Copyright Act and they remain a controversial issue in the USA (*New Scientist*, 2001; Electronic Frontier Foundation, undated). Yet they are included in the US FTA. These protection measures ban acts of circumvention and the distribution of tools and technologies used for circumvention. Rights owners have the power unilaterally to eliminate fair use rights, stifle research and block text-to-speech software for blind people. They can institute differential pricing using technological control measures, such as lockup or protection codes on electronic books and CDs, and content-scrambling or regional coding systems on DVDs. These controversial laws can also create monopolies over devices and equipment that handle digital media (Domingo, 2004). Technological restrictions are employed in a growing number of consumer products, such as DVDs, printer toner cartridges and garage door openers, etc., to prevent competitors from building interoperable components (IP Justice, undated/a: 14). They have

the potential to lock up information long after the copyright term has expired, and to lock up indigenous knowledge behind electronic databases controlled by multinational corporations operating content industries in developing countries. They are also an impediment to the development of software industries and open access projects in these countries, and are capable of creating barriers for ICT solutions. The technological restrictions protected by anti-circumvention laws erode and infringe upon the public's rights (IP Justice, undated/b).

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

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

TRIPS-Plus and public health

The Doha Declaration on the TRIPS Agreement and Public Health at the World Trade Organization (WTO, 2001b) recognised that the TRIPS Agreement, as an international instrument for the protection of intellectual property, should operate in a manner that is supportive of and does not run counter to the public health objectives of all countries (Raghavan, undated). The UK Commission on Intellectual Property Rights (2002) explicitly affirmed the Doha Declaration (Keayla, 2005). It encouraged developing countries to use compulsory licensing and generic competition to increase access to essential medicines.

Apart from affecting access to information, including health information, TRIPS-Plus also erodes the Doha Declaration by eroding TRIPS legal exceptions. It limits the ability of weaker bilateral or regional partners to promote technological innovation, facilitate the transfer and dissemination of technology and take necessary measures to protect public health and prevent the abuse of intellectual property rights by patent holders (International Intellectual Property Alliance, undated).

It restricts generic drug competition and the export of generic drugs to other countries. Sub-Saharan Africa has more than 70 per cent of all cases of HIV/AIDS in the world (Avafia, 2005). If TRIPS-Plus were adopted, public health in this region would be seriously compromised, putting millions of lives at risk.

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

By advocating TRIPS-Plus, the USA is betraying its public commitment and the international consensus reached at Doha to assist developing countries to fulfil their obligation to protect public health. It is arbitrarily interfering with developing countries' good-faith efforts to improve and lengthen the lives of their citizens. It should in reality be promoting flexibility in determining appropriate levels of national patent protection, rather than making access to US markets conditional upon adoption of TRIPS-Plus (Consumer Project on Technology, 2003: 3–4).

African countries must prioritise public health and development policies over private commercial interests. They must implement the Doha Declaration and TRIPS flexibilities as soon as possible.

Should Africa adopt TRIPS-Plus?

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

How would developing countries benefit from laws that overly protect foreign knowledge products and hinder growth of fragile domestic knowledge industries (Kawooya, 2004)? How can they possibly benefit if the concentration of wealth in the North is increased at their expense?

TRIPS-Plus provisions also have serious implications for innovation, privacy and competition. They would dramatically expand the scope of copyright to permit copyrighting of facts and data, which would clearly

restrict access to information in the public domain. A vast universe of technical and scientific data, as well as large classes of facts, such as compilations, would be roped off from the public. This would be most damaging to education and libraries (IP Justice, undated/a: 26).

TRIPS-Plus provisions undermine democracy and national sovereignty and contradict the clear will of the public (IP Justice, undated/b). By including this chapter in any FTA, or any other agreement such as investment or economic partnership agreements, all chances of developing countries adopting the flexibilities in international agreements would be permanently overridden. The door to better access to global knowledge would effectively be 'slammed in their faces'.

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

It would therefore be more appropriate for African countries to reject the TRIPS-Plus chapter and to continue supporting the WIPO Development Agenda[20] proposed by Argentina and Brazil on behalf of 14 developing countries, which include the Africa Group. They should also support the Access to Knowledge Treaty (A2K),[21] which consumer groups, civil societies, IFLA and libraries around the world are calling for through WIPO.

Copyright cooperation in Africa

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

In 2004 the Southern African Development Community (SADC)[22] and the Standing Conference for Central, Eastern and Southern African Library Associations (SCECSAL) in Uganda supported my recommendation to establish an African Copyright Forum to address copyright issues and cooperation in Africa.

An international conference was held in Kampala, Uganda, on 28–30 November 2005, with more than 130 delegates attending from 23 countries. The conference was co-sponsored by the Commonwealth of Learning and IFLA, via the National Library of Uganda and the Ugandan Library

Association. The conference finale was the establishment of the Africa Copyright and Access to Information Alliance, which has subsequently been renamed the African Access to Knowledge Alliance (AAKA).

A number of international funding organisations have already offered assistance to this new alliance. The AAKA will work very closely with the Electronic Information for Libraries Network (eIFL.net), the Commonwealth of Learning (Canada) and other international and regional organisations involved in researching copyright and access to knowledge issues in Africa. The AAKA will provide advice and assistance to African countries when reviewing their copyright laws and strongly promote the adoption of legal limitations and exceptions into their domestic laws. It will also encourage educational and library sectors to be involved in the legislative process when their countries review their copyright laws. To date, these important stakeholders have not been included in the legislative process. As a result, rights owners have pressed for the strictest laws without addressing the needs of education or libraries, e.g. in Ghana, Côte d'Ivoire, Botswana and Mozambique. Swaziland has indicated that it will now include librarians and educators in discussions before it finalises its draft copyright bill. Since the conference in Kampala, discussions have taken place between the AAKA and the Ugandan Law Commission regarding its copyright legislation. It is hoped that the commission will consider AAKA recommendations for the benefit of education, research and libraries. The AAKA will in the future also participate in regional and international forums, such as WIPO and the WTO, to present and debate copyright issues on behalf of its member countries.

Challenges and recommendations

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

- The TRIPS-Plus proposals are *not* the answer for African countries. As developed countries were given unrestricted time and space to reach their current levels of development, so developing countries today should be allowed to enjoy similar privileges. African countries must strongly resist pressure to adopt TRIPS-Plus or other proposals that strike at the very heart of their economic and development policies. They must not be coerced into the economically skewed trade liberalisation programmes of rich countries.

- International and national intellectual property laws need to be reviewed, liberalised and harmonised to facilitate, *not restrict*, access to knowledge; to encourage innovation and scientific research; to protect indigenous knowledge; to accelerate development; and to enable cross-border exchange of information. In this way, the balance between the *just* demands of rights owners *and* consumers would be restored.
- Legal flexibilities in international agreements, including provisions for education, libraries and people with visual, auditory and other perceptual disabilities, must be incorporated into national laws as soon as possible.
- To address 'orphan works', where rights owners are untraceable, African countries should consider legislation similar to the proposed Public Domain Enhancement Act in the USA.
- Publicly funded research should be made more accessible through open access initiatives.
- Alliances should be established with international organisations, addressing issues affecting access to knowledge in developing countries.
- African countries need to work together to find an appropriate copyright solution that works for Africa.

In conclusion, I urge readers of this chapter to challenge developed countries on this issue and challenge their own governments to do the right thing. They should encourage them to give full support to the WIPO Development Agenda, the Access to Knowledge Treaty (A2K) and other proactive initiatives to help their countries fast-track their status from 'developing' to 'developed', so that they will *all* be able to participate as *equal* partners on the global stage. What a better world that would be for all of us (Nicholson, 2005).

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Notes

1. E-mail to author from Frans Boot of Statistics South Africa, 15 November 2005.
2. Full definitions are available from WIPO at www.wipo.int/about-ip/en.
3. See www.un.org/Overview/rights.html.

4. E-mail to author from Christo Lombaard, South Africa Department of Education, 28 July 2005.
5. E-mail to author from Gerard Robinson, South African Dramatic, Artistic and Literary Rights Organisation, 8 August 2005.
6. See www.wto.org/english/tratop_e/trips_e/t_agm0_e.htm.
7. See, for example, the text of the US-Australia FTA's IP chapter, clauses 2 and 4, at www.ustr.gov/assets/Trade_Agreements/Bilateral/Australia_FTA/Final_Text/asset_upload_file469_5141.pdf.
8. See www.ustr.gov/Trade_Agreements/Bilateral/Morocco_FTA/Section_Index.html.
9. See www.jordanusfta.com.
10. See www.fta.gov.bh.
11. See www.bilaterals.org/article.php3?id_article=884.
12. See www.tusbc.org.
13. See www.ustr.gov/Trade_Agreements/Bilateral/Republic_of_Korea_FTA/Final_Text/Section_Index.html.
14. See www.ustr.gov/Trade_Agreements/Bilateral/CAFTA/CAFTA-DR_Final_Texts/Section_Index.html.
15. See www.dfat.gov.au/trade/negotiations/us.html.
16. See www.agoa.info.
17. See note 15 above.
18. See note 15 above.
19. E-mail to author from James Boyle, William Neal Reynolds Professor of Law, Duke Law School, Duke University, USA, 1 September 2005.
20. See www.wipo.int/documents/en/document/govbody/wo_gb_ga/pdf/wo_ga_31_11.pdf.
21. See www.cptech.org/a2k/consolidatedtext-may9.pdf.
22. The SADC includes 14 developing countries: Angola, Botswana, the Democratic Republic of Congo, Lesotho, Malawi, Mauritius, Mozambique, Namibia, Seychelles, South Africa, Swaziland, Tanzania, Zambia and Zimbabwe.

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3

The CI study on copyright and access to knowledge

Rajeswari Kanniah

Introduction

Copyright, as indeed all intellectual property rights, does not grant the owner absolute rights. The owner's rights are qualified with limitations and exceptions so as to enable the public to gain access to such materials under certain conditions. The public are granted access, for instance, for personal non-profit use or for research and educational purposes.

These limitations and exceptions, the scope of works and rights protected by copyright and the duration of copyright are contained, albeit to a differing degree, in each of the international copyright treaties – the Berne Convention, the Agreement on Trade-Related Aspects of Intellectual Property Rights (TRIPS) and the World Intellectual Property Organization Copyright Treaty (WCT). Any country that becomes a party to these international treaties is entitled to avail itself of these 'flexibilities' in order to ensure that public access to copyrighted materials is secured.

Consumers International (CI) recently conducted a study and published a report on 'Copyright and access to knowledge' (CI, 2006). The study sought to determine the extent to which the Berne Convention, TRIPS Agreement and WCT (WIPO, 1996) each provide for flexibilities for public access to knowledge of copyrighted works; and the extent to which the national copyright laws of 11 developing countries in Asia (Bhutan, Cambodia, China, India, Indonesia, Kazakhstan, Malaysia, Mongolia, Papua New Guinea, the Philippines and Thailand) take advantage of these flexibilities.

The study also reviewed the World Intellectual Property Organization (WIPO) draft laws on copyright and related rights and the US-Singapore Free Trade Agreement (FTA) with respect to its provisions on intellectual

property rights. In addition, a comparative price study of educational textbooks in Indonesia, Thailand and the USA was conducted.

The CI (2006) report reveals the following.

- The international instruments have progressively ratcheted upwards the scope of protection, the rights accorded to copyright owners and the duration of protection for copyright owners.
- All the 11 developing countries have not taken advantage of all the flexibilities available to them in the international treaties they signed, and in fact give copyright owners far more rights than they need to under these treaties.
- The WIPO draft laws on copyright do not provide for all the flexibilities available in the international treaties and are more restrictive than need be of public access to knowledge.
- The US-Singapore FTA has ratcheted the copyright protection of owners even higher than is required by the three international treaties.
- The same books are far more costly in Indonesia and Thailand than in the USA, when compared in terms of the gross domestic product per capita of the countries concerned and purchasing power parity.

The international copyright regime

The Berne Convention for the Protection of Literary and Artistic Works 1886[1] is the first international treaty on copyright. The UK mooted the idea of international cooperation, and the early members were mainly Western European countries (Belgium, Germany, France, Spain, Switzerland, Tunisia and the UK became members in 1887). The USA only became a member of the Berne Convention in 1989. The first Asian country to become a member was Japan in 1899. The majority of the developing countries in Asia did not formally adopt the Berne Convention until well into the twentieth century.

Copyright protection for educational materials has been increasingly strengthened since the Berne Convention was adopted in 1886. The only attempt to streamline the convention to take into account the needs of developing countries for mass education was made at a conference in Stockholm in 1967. The attempt eventually failed and the only agreement in this regard was reached in Paris in 1971, where a watered-down set of exemptions for developing countries were included as an appendix to the Berne Convention. Nevertheless, there are important limitations and

exceptions in the Berne Convention that balance the rights of copyright owners with access in the public domain.

Since then, the TRIPS Agreement (WIPO, 1995) and the WIPO Copyright Treaty 1996 have expanded copyright protection even further to areas that were previously not covered in the Berne Convention.

The TRIPS Agreement committed all the member countries of the World Trade Organization to adhere to the Berne Convention and its appendix (except for the moral rights provisions of the convention), regardless of whether they were a party to the Berne Convention. The TRIPS Agreement raised the threshold set out in the Berne Convention. It added computer programs and databases to the categories of copyright works. It also expanded the bundle of rights accorded to copyright owners to include the right to control commercial rental of computer programs and cinematographic works.

Then came the WCT in 1996, purportedly to address the challenges posed by the digital world. It expanded the scope of the right to communication to include communication via the internet. In addition, the WCT requires legal remedies against the circumvention of technological protection measures (TPMs). TPMs pose problems. They are being used not only to prevent unauthorised access to copyrighted material but also to deny access to material that rightfully belongs in the public domain. For example, both the TRIPS Agreement and the WCT provide that copyright protection does not extend to the data or material contained in compilations of such data or material, but TPMs are being used to limit access only to users who pay a fee. TPMs can also be used to deny access to educational material that is in fact allowed by copyright exceptions.

Developed countries using their influence at WIPO and through bilateral and regional trade agreements to further their trade and commercial interests have further expanded copyright protection for owners. The space available to developing countries to adopt policy options suited to their development needs has consequently been reduced. Each of the international treaties and FTAs served to reduce further the options that can be used to enhance access to knowledge and facilitate education.

The Berne Convention, the TRIPS Agreement and the WCT all provide a different set of flexibilities for developing countries. The exact mix of flexibilities available to a country therefore depends on the treaties to which it has become a party.

A country not a party to any of the international treaties is free to fashion its copyright law in any manner it chooses. In the Asia-Pacific

region there are at least 14 such countries (as at 28 November 2005). However, the vast majority of the developing countries in the world have signed on to at least one of the international treaties. In total, 80 countries have signed the Berne Convention and TRIPS, while 52 are parties to all three.

National copyright laws

Access to educational materials, especially in the field of higher scientific and technical education, is crucial for the poor countries to develop their human resources and achieve economic progress. In order to educate people, schools, universities and libraries need access to affordable teaching and learning materials. Copyright laws, if crafted intelligently, can contribute to knowledge and the development agenda.

In order to maximise access to knowledge, the copyright laws of developing countries should therefore provide for public access to copyrighted materials, especially educational materials. They should take advantage of all available flexibilities in the international copyright treaties. The CI study found that this has not happened.

- Bhutan has granted copyright protection to computer programs and compilations of data when this is not necessary under the Berne Convention, to which Bhutan is a party.
- Ten out of the 11 countries studied (except for the Philippines) have extended the duration of copyright protection for some or all work forms beyond the minimum duration required by their treaty obligations.
- The Berne Convention does not prohibit the utilisation of the whole of a work for the purpose of teaching, so long as it is justified by the purpose and is compatible with fair practice. However, only three of the 11 countries studied (Indonesia, Malaysia and the Philippines) allow such a possibility.
- The Berne Convention does not restrict the number of copies of publications or sound or visual recordings that can be made for the purpose of illustration for teaching. However, five out of the 11 countries studied (China, India, Indonesia, Kazakhstan and Papua New Guinea) expressly restrict the number of copies of these materials that can be made for teaching purposes.

- The Berne Convention expressly allows national lawmakers to impose a requirement for works to be 'fixed in some material form' before they qualify for copyright protection. Such a requirement permits countries to provide copyright protection only to materials that appear in some physical form. Member states are also entitled to give a narrow meaning to the term 'material form' so as to, for example, exclude digital materials from copyright protection. Unfortunately, ten out of the 11 countries studied have not specified 'fixation in material form' as a condition for conferment of copyright. Only Malaysia has done so.
- Copyright protects not the idea, but the expression of the idea. This principle serves the important public policy of preserving and enriching the public domain and ensuring that new expressions such as electronic databases do not 'lock up' ideas. China, India and Indonesia have not incorporated in their copyright legislation a provision excluding ideas from copyright protection.

WIPO's legislative advice

The CI study reviewed the WIPO draft laws on copyright and related rights (versions 1 and 2). The draft laws do not address many of the flexibilities identified above. Indeed, in WIPO's draft laws 'public lending' is included as one of the economic rights of the copyright owner. Public lending is defined as 'the transfer of the possession of the original or a copy of a work… for a limited period of time for non-profit making purposes, by an institution, the services of which are available to the public, such as a public library or archive'. This right is not required by any of the international copyright treaties.

Of the 11 developing countries in the CI study, four – Bhutan, Cambodia, Papua New Guinea and Kazakhstan – have included public lending as an economic right in almost identical language to that found in the WIPO draft laws.

Such an extension of the copyright owner's rights is particularly restrictive of public access to knowledge, since it means that a library cannot lend books without prior permission of the copyright owner. Libraries the world over are the repositories of knowledge at low cost. This important public and social service that libraries perform will now be curtailed if they have to seek permission and pay fees to copyright owners for the books they lend out.

The right to control 'importation of copies of the work' is included in the draft laws in parentheses. The footnote clarifies that such a right is not based on any of the international copyright instruments, but is aimed at safeguarding 'the principle of territoriality in copyright'. The draft laws thus explicitly do not recommend parallel import of copyright works.

Although the duration of copyright provided in the main text of the draft laws is the minimum required by current international copyright instruments, a footnote is included to advise countries that 'the present tendency at the international level is to extend the term of protection to 70 years after the author's death'. What WIPO seems to be doing is recommending the longer duration of protection that is only practised in the USA (since 1998) and the EU (since 1995).

Further, the draft laws do not provide for:

- compulsory licensing of copyright works;
- works to be fixed in a material form before they become eligible for copyright protection;
- limitations and exceptions for the provision on circumvention of TPMs;
- the whole of a work to be used for illustration in teaching;
- more than one copy of a copyrighted work to be reproduced for face-to-face teaching in educational institutions;
- quotations to be used in full – only a 'short part' may be quoted;
- unpublished works to be quoted;
- exclusion of political speeches from copyright protection;
- exceptions to allow copyright works to be used in broadcasts for educational purposes;
- 'minor' reservations for educational purposes in respect of performance, broadcasting, recitation, recording and cinematograph rights.

WIPO is clearly not providing proper legislative advice to developing countries so as to enable them to take full advantage of all the flexibilities available to them. CI has called on WIPO to undertake a thorough review of its draft laws to ensure that all permitted limitations and exceptions are incorporated into these laws. WIPO is indeed reviewing its draft laws, and it remains to be seen if the above shortcomings will be addressed.

The US-Singapore Free Trade Agreement

The CI study also reviewed the US-Singapore FTA to determine how copyright protection is addressed. The US-Singapore FTA commits the contracting party to accede to the WCT; includes the right to prohibit all reproductions, including temporary reproduction in electronic form; increases the duration of protection to life of author plus 70 years; and makes mandatory legal protection and legal remedies against the circumvention of TPMs. In this manner, the FTA has ratcheted upwards the copyright protection prescribed in the Berne Convention, the TRIPS Agreement and the WCT.

The US-Singapore FTA is seen as the model for the US negotiations for bilateral agreements with Asian countries. The USA is now negotiating FTAs with Thailand and Malaysia. Clearly, access to knowledge will be jeopardised in these two countries if the same model is applied.

Pricing of copyrighted materials

The comparative price survey of educational textbooks in Indonesia, Thailand and the USA shows that when the price of a book is considered in the context of a country's GDP per capita (i.e. the average individual income), these books become prohibitively expensive to the average Indonesian and Thai. For example, when a student in Indonesia is made to pay US$81.70 for Goodman and Gilman's *The Pharmacological Basis of Therapeutics*, it is equivalent to a student in the USA paying US$3,170.97 for the same book in GDP per capita terms and US$913.07 when compared using the GDP per capita calculated at purchasing power parity (PPP) exchange rate.

CI's field research studies in Thailand and Indonesia revealed that most copyrighted English-language university textbooks are imported and priced beyond the affordability of the average university student. Students then resort to photocopying copyrighted books, and this is a rampant and everyday occurrence in both countries.

Even academic libraries in Indonesia and Thailand are increasingly unable to afford subscriptions to foreign-published journals. The state-owned Indonesian Institute of Science has substantially cut its subscriptions to foreign journals, from 1,610 before the 1997 financial crisis to 42 since. Similarly, in Thailand many libraries regularly conduct evaluations to cull subscriptions to those journals that are not widely used or referred to. In

addition, publishers of digital journals often impose legal and technological barriers, such as limiting the number of users accessing the content at any one point by IP address or user ID authentication or digital rights management. Libraries thereby do not get the full use of the journals they have paid for, unlike printed copies where there is no restriction on the number of users. Such restrictions have the effect of severely limiting access to knowledge for research and development.

Using copyright laws to increase access to knowledge

Policy-makers in developing countries need to be better aware of their obligations under the international treaties they have signed. For national copyright laws even to take advantage of the flexibilities common to all three international treaties, they have to provide for the following.

- Keep the duration of copyright protection to the minimum required: literary and artistic works – life of author plus 50 years; cinematographic works – 50 years; anonymous or pseudonymous works – 50 years; works of applied art – 25 years.
- Allow parallel import.
- Provide for compulsory licensing options for translation, reproduction and publication of copyrighted works.
- Make 'fixation in material form' a condition for conferment of copyright.
- Provide protection only for the expression of the idea, not the idea itself.
- Provide for power to deal with anti-competitive practices.
- Include a general 'fair use' provision.
- Use all the teaching exceptions: allow the use of the whole of a work, not limit the types and forms of utilisation; apply the teaching exception to all classes of education including distance education; and not restrict the number of copies that can be made for teaching purposes.
- Use all the quotation exceptions: not restrict the ways quotations can be made, not limit the types of works that can be quoted, provide the widest interpretation for the quoted work to have been 'lawfully made available to the public', not limit the length of the quotation and not limit the purpose of the quotation.

- Exclude official texts, political speeches, speeches delivered in the course of legal proceedings and their translations from copyright protection.
- Allow the use of copyright works in broadcasts for educational purposes.
- Provide 'minor reservations' for educational purposes in respect of performing, recitation, broadcasting, recording and cinematographic rights.

Conclusion

The CI report reveals that the space for access to knowledge is shrinking, not only because of increased pressure for more rights from copyright owners but also because developing countries are giving away public rights.

Developing countries are net importers of copyrighted material. They are in no position to be magnanimous in protecting the rights of copyright owners. Yet they are bowing to pressure and granting more protection and rights to copyright owners than they need to by their treaty obligations. This has grave implications for the access to knowledge of their people. By increasing the restrictions and excluding the limitations and exceptions, they are permitting less and less information to be freely available in the public domain. Such curtailment serves the interest of a privileged few at the expense of the millions in need.

Moreover, the overwhelming emphasis on the protection of the rights of copyright owners has led to the misguided notion among the public (especially students, teachers and librarians) that there is no free access to information. They fear that they may be infringing on someone's copyright and consequently do not exercise their own rights in relation to copyright owners.

Governments need to commit to expanding, not reducing, access to information and knowledge in the public domain. They should reform their copyright laws to permit for all the limitations and exceptions to which they are entitled. They should also commit resources towards launching an awareness campaign to educate the public on how best they (students, teachers, archivers, academics and librarians) can leverage and capitalise on the free access to copyrighted materials to which they are entitled.

Note

1. The Berne Convention for the Protection of Literary and Artistic Works (1886–1979) can be found at www.wipo.int/treaties/en/ip/berne/trtdocs_wo001.html.

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Political realities and the English public library service

Chris Batt

Introduction

In August 2007, under the auspices of the National and State Libraries Australasia, I undertook a tour across Australia presenting a portfolio of lectures to library staff and cultural policy-makers. One of the lectures was entitled 'Do we really need public libraries?'. Using the English public library system as a model, the lecture challenged audiences to consider what service managers should be doing to promote and develop their library services in the twenty-first century. What are the levers to unlock new resources? What should be the balance between local priorities and national policy agendas? (There are 149 separate library services in England running over 3,000 libraries.) How should the continuing case for public libraries be argued?

As I began the preparations for writing this chapter I read a review in *Ariadne* by Lorcan Dempsey (2007) of the recently published third volume of the *Cambridge History of Libraries in Britain and Ireland* (Black and Hoare, 2006). In that review, while addressing libraries generally, Dempsey makes a comment that touches exactly one of the big problems facing English public libraries: 'One has a sense of a profession more comfortable in asserting rather than demonstrating value, which focuses on the means rather than the end, and which does not do a good job of connecting its agendas to broader social and political agendas.' It does seem to me that bridging this gap between affirmation and demonstration is at the heart of what needs to be done, and that will call for far greater political awareness within the profession. This will come in two forms. Public service engages with 'politics' in the traditional

sense of acting together to define and implement policy influenced by whatever the party political flavour might be, whether within a local authority (professionals advising elected members) or nationally (where ministers will consider policy options from advisers). Librarians will need to understand much more about the dynamics of these processes. Beside this there is a layer of professional politics that has always existed, but which now calls for closer attention. It is within this context that the greatest influence will be achieved. If the profession cannot agree a collective vision, cannot agree nationally, regionally and locally what should be the key advocacy messages, cannot agree what evidence can be gathered to demonstrate public value, then the outlook will be no better than gloomy. The first of these I call *policy intelligence* and the second *the politics of professional coherence*. What follows will address both these aspects of political landscape.

To calm the nervous reader I will state at the outset – regardless of the provocative lecture title – my belief is that in a century when learning, skills, knowledge and understanding will be critical drivers of social and economic development, the public library will be more important than ever before. English public libraries have a proud tradition of social development and change, and that is just as important today and tomorrow as it was in 1850. Yet in today's world of management accounting, policy targets couched in terms of community cohesion, crime prevention, better education and so on, it is the demonstration of strong narrative with vivid evidence of success that will catch the eyes of the policy-maker and the politician. To translate the 'revolutionary' nature of the public library into today's competitive agendas will call for new skills and capabilities. Yes, political awareness and advocacy, but also focus on quality evidence, collective vision and passion, and a grasp of what is meant by public value. So, alongside the skills that have stood the test of time – organising knowledge, customer care, commitment to social inclusion – library workers will need to develop a range of new competencies.

The historical perspective: popularity, invisibility and good fortune

Public libraries in the UK have been instruments in the political landscape from their very beginnings in the middle of the nineteenth century. The decision by Parliament in 1850 to allow certain local

authorities to use local taxes to create public libraries was seen as a mechanism of bringing knowledge and education to the working classes, leading to improved social conditions and workforce capability. That was no sudden decision unsupported by evidence. The importance of social development through self-help, so much a part of mid-nineteenth-century public policy and private benevolence, had long been apparent in the working-class libraries, exemplified by the Mechanics' Institutes movement that emerged in the 1820s, but also in more informal circulating libraries that can be traced further back into the eighteenth century (Rose, 2001). The average worker would struggle to buy one book, let alone build his or her own library, but if enough workers contributed enough small sums of money a collection might be created that could then be shared. This was voluntary collective action giving individuals access to books beyond their own means; self-help in action.

History, therefore, shows that public libraries were born out of social revolution. It was the public library service that underpinned the drive towards universal education during the second half of the nineteenth century alongside other public institutions of social improvement. Yet while Victorian community safety nets such as the public bathhouse and the workhouse disappeared early in the twentieth century, the public library continued to provide a source of knowledge and inspiration for increasing numbers of people as local authorities invested in library buildings, collections and staff. That sense of riding the crest of the wave of change, even occasionally being the energy of the wave itself, is also visible closer to the present day. I offer two examples. In the austerity years after the Second World War the public library was an important means of accessing new media such as musical recordings and the burgeoning mass market of magazines, journals and newspapers, opening up new worlds. In more recent times the £170 million People's Network programme to create ICT learning centres in all UK public libraries demonstrably drove the ICT revolution, pushing out broadband across the country and introducing millions to the joys and challenges of the digital world. Across a gap of 150 years that flame of social revolution continues to burn.

There are two ways in which public libraries can claim always to have been popular places. The most obvious is that lots of people use them. Today's comparisons include being more popular than attending a professional football match or visiting a cinema, and being the most used elective public service. The second way relates to people's perception of the public library's value. In public opinion surveys they always rank high in the rating of council services in the minds of both users and

non-users. The library is seen as an essential community asset whether actively used or not. This phenomenon is most apparent in the fact that while new libraries are always welcomed, it is very difficult indeed to close one! Users and non-users alike will demonstrate, sign petitions and lobby. This is powerful medicine for the future.

Given all the evidence of history and of public popularity for public libraries it is thus surprising just how invisible they remain in the minds of politicians and policy-makers. Local politicians may well recognise the community value of 'their' public library, but less likely is the probability that they or senior local government officials will see the library service as a tool of wider social policy. The same is true in national government. Outside of the Culture Department, the public library does not appear on the radar of policy developers. Even when it is on the radar, for example in the People's Network programme, the quality of delivery and the impact do not lead to a reappraisal of the wider social value of the public library. This disconnection between the success of the public library in continuing to attract the support of users and non-users alike and the failure at the national political level to see libraries as important tools of individual and social improvement is not new, but today it is a significant block to future development.

I cannot end this section without saying something about good fortune; those decisive moments when national political/policy decisions were taken that delivered long-term benefit. To the outside world good fortune (or luck) may strike with the randomness of lightning, but in the public sector it is certain that behind the scenes considerable work has gone on to create the climate and the confidence for a decision to be taken. It remains important to recognise the value of good fortune. Take, for example, three decisive dates in the timeline of England's public libraries: 1850 – the powers granted by Parliament enabling local authorities to fund public libraries; 1964 – legislation passed making public libraries a statutory service, setting out the duty of local authorities to provide library services to all citizens; and 1998 – £170 million of government funding for the People's Network programme. In the case of the first, a 'no' decision would have delayed significantly the foundation of universal education; with the second there might never have been a national framework of public libraries; and with the last, public libraries would have struggled to position themselves within the knowledge society since there would be no consistent approach to ICT delivery. More widely, the speed of roll-out of broadband and the diffusion of internet literacy within the population would have been far slower. The recognition of such opportunities will be as important in the future as it has been in the past.

The 'outside world'

The intention of policy-makers in 1850 was to give better access to knowledge and ideas to those who could not afford to buy the books they wanted, but public libraries have always been open to everyone. English public libraries in the twentieth century attracted people from all walks of life and all community and cultural groups. In recent years library services have worked hard to ensure that the resources they provide genuinely meet the needs of their communities, and have reached out to provide service where it is needed rather than being solely building-bound. However, the purpose of this chapter is to propose actions that will sustain the value of England's public libraries in a period of social, economic and political change that is as turbulent and uncertain as anything experienced in the past. It is therefore important to consider those external factors that must influence how library services should evolve. There is no shortage of media coverage on our *age of uncertainty*, and here it is necessary only to pick out the factors of direct bearing on public library strategic planning: politics and public policy, market competition and people's expectations. Each of these in its own way makes very clear the need for new approaches to strategic planning and political competencies.

Politics and public policy

There are both local and national issues. First, across the whole of the public sector in England (and in many other places) there is now a perpetual need to reduce cost or increase productivity; 'do the same with less, do more with the same'. Then there is the tension between local choice and national provision. Quite rightly, local communities are encouraged to engage with priority-setting and service options, but not always with recognition of the need to provide consistent delivery across the whole country. This has been visible for some years within education, where the devolution of funding to school governors has led to very significant variations in core service provision. The results include variable quality of school libraries even within the same local authority. While the statutory status of public libraries in the UK mitigates against the worst effects of this, the limited 'command and control' from national to local levels means that it is not easy for government policy in specific service areas to be delivered consistently. Indeed, emerging government policy aims to lighten the load of measurement and direction placed on

local authorities so that, for example, statutory public library standards, having driven up service quality and consistency over the past five years, will end in 2008. Should this lightening of national direction extend to removal of the duty to provide a library service, there will be more challenges to the need for public investment to deliver service where there is a viable commercial market. 'There are plenty of bookshops and books are cheap' and 'Isn't all information on the internet?' are comments that will continue to demand clear and unequivocal answers.

Market competition

For most of their history public libraries have maintained an unchallenged monopoly of provision of access to recorded knowledge and information. It is only in the past 20 years that the 'globalisation' of book publishing, with cheap paperbacks and bright, shiny bookshops, the burgeoning of communications media with specialist TV channels and magazine publishing and most recently the World Wide Web have combined to offer the consumer choices never before available. Amazon will not only deliver books to your door, it will rent you a DVD with no specific return date; cable and satellite companies stream programmes 'on demand'; and Wikipedia never closes. This choice extends beyond the provision of services that compete with the public library's role to the time that people have available to them and what they do with it. For many, the work/life balance has changed as mobile phones, laptops and Blackberries make the office a portable item that expands the working day. And there are more choices as to how to use what free time there is, such as special-interest TV channels, the cinema, immersive virtual worlds like Second Life, computer gaming and the social networking of Web 2.0. These are trends that will not reverse and the public library will need to show how it adds value; providing unique services and opportunities and supporting personal identity and learning are obvious examples that come to mind.

People's expectations

Gone are the days when people were prepared to accept a library service regardless of quality or scope. While there may be a collective emotion that a public library is an essential part of the community, attracting and retaining users depends more and more on the quality and accessibility of the library space and the range of services that are on offer. When high

streets and shopping malls are glittering palaces of endless choice, library visitors may not be attracted to poorly maintained buildings with tired stock, short opening hours and an air of scruffiness. Across England there are excellent examples of high-quality library renovations[1] and new builds[2] that compare favourably with the standards, finishes and style we expect from shops in the high street. Libraries where the book stock is fresh, relevant and attractive, where the traditional dreadnought checkin/checkout desk has been replaced by self-issue and the welcoming feel of a 'living room of the community', and where the opening hours really do reflect the community's needs. Such places attract new users in droves. In addition, the wide access to and take-up of broadband in the UK means that 24/7 access to banking, shopping, information and entertainment has changed people's expectations in other parts of their lives. These are crucial factors in defining the future of the public library.

And the consequence is…?

We have arrived at the point where the strengths and weaknesses and external environmental issues can be brought together to formulate strategies linking the present to the future. Three types of intervention are proposed:

- incremental development – improving what is already useful;
- synoptic change – innovation, doing new things in new ways;
- building a better narrative – a compelling story that will be listened to and believed.

To greater or lesser degree, these are already visible in England's public libraries, and examples will be cited of impact to date. Referring back to the two types of political engagement described earlier, the *policy intelligence* relates partly to the second intervention and totally to the third, and *the politics of professional coherence* relates to all three.

Incremental development – improving what is already useful

Since 2002 English public libraries have benefited from a national improvement programme managed by the Museums, Libraries and Archives Council and funded so far to the tune of £10 million.

Framework for the Future[3] is a ten-year development programme commissioned by the Minister for the Arts in 2002: a national intervention to improve local services. The reach of the framework is wide,[4] covering books, reading and learning, digital citizenship and the library as a community place. Of particular importance to professional coherence is work around national improvement models. The public library standards were referred to earlier in regard to easing the regulation of local government. During the five years that these standards have been mandatory the number of libraries open on Sundays has increased fourfold, the level of investment in resources has increased in real terms and public library service managers have reported that linking achievement of the standards to national evaluation of local authority services has been an important mechanism for improvement. Suddenly the public library is not so invisible to politicians and policy-makers. What will be the consequence of the standards no longer being required is not yet known.

One of the most innovative elements of Framework for the Future has been the Leading Modern Public Libraries Programme[5] (LMPL) for over 660 service heads, senior staff and future leaders. The LMPL was at once the means of building collective vision across current leaders and the means to create a new generation of library leaders. External evaluation of the programme has shown, first, that it has made a major contribution to the delivery of the wider aims of the framework by encouraging collective learning, and second that it was a highly successful process. Ninety-four per cent of those attending the programme rated it excellent or very good; as the external evaluation reported, 'this is as good at it gets!'. In relation to this present assessment of how to deal with the future there are two specific points to be made arising from a 360° feedback study and a transformational leadership questionnaire undertaken by a large number of existing heads of service. First, library leaders have the same transformational leadership strengths as leaders in other parts of local government, schools, the NHS and central government and share the same development needs. Second, and perhaps more telling here, library leaders consistently underrated themselves compared to their counterparts in local government, most significantly on three scales: being decisive, resolving complex problems and building shared vision. And, moreover, their bosses felt the same way. The leaders lack confidence in their own abilities, and that lack of confidence is often transmitted to their bosses. Of course, recognising the problem is the first step towards a solution, and that must remain at the heart of framework priorities and remain in the minds of the leaders themselves.

The third collective activity covering all of England's public libraries has been a programme of strategic marketing intended to give simple and compelling messages to the public, policy-makers and politicians about the importance of the public library in the twenty-first century. The result of that research was the design of an advocacy tool that would catch people's attention, whether potential user or policy-maker, to inform them clearly and simply about the success story that is the public library. *The Little Book of Public Libraries*[6] is pocket-sized, full of high-quality colour images and presents a series of direct statements: 'If you are already a library champion, this book will give you key messages that we'd like you to pass on to friends and colleagues. If not, we hope it will open your eyes to the valuable contribution libraries make to families, communities and society as a whole.' 'If you haven't visited a public library for a few years, go and take a look. The library of today is probably not the place you remember.' The style of *The Little Book* is direct, with strong, confident messages. It has been a great success: a compelling example of how a collective approach achieving the highest, rather than the lowest, common denominator will change people's view of libraries, and an exemplar of the value of professional coherence.

The Framework for the Future programme has done many other important things to support the improvement of library services delivered to England's citizens. Of equal importance for the long-term health of libraries has been the growing understanding of the need for a 'national view' of public libraries. Consistency of service, the move to increased service accessibility – longer opening hours and online – and the simplification of procedures – one library card for all public libraries in a region, single online access route to library catalogues – all paint a simpler and bolder picture of public value.

Synoptic change – innovation

Innovation often starts in small and insignificant ways. An idea to improve services sparks an experiment that just occasionally changes the world. In the world outside out of public libraries this is exemplified by almost every Web 2.0 development that has taken place. The powerhouse was not big business: compare IBM's synoptic actions in inventing and marketing the PC to such household names as Google, Facebook and YouTube, all of which emerged from the heads of young people in bedrooms and garages. This should tell us that it is impossible to plan what the big ideas might be in the same way service planning is

done: 'year two, quarter three – invent Google!' Second, public services are naturally cautious about radical change, since the public value test of the outcomes of delivery to individuals and communities quite rightly calls for community engagement and the filter of political decision-making. A commercial publisher might decide to take the risk of moving wholly to e-books to drive the market that way. English public libraries would find that approach impossible. Finally, synoptic change is a risky business, and for all the great success stories that change the world there are plenty that end up on the spike.

Naturally, a big programme of action that innovates and delivers against government agendas should be a very strong card in the politics of public service. The People's Network is the exemplar of this. Individual library services in a number of developed countries had been experimenting with public access to the internet through the early 1990s. In the UK similar early experiments, mainly funded by small development grants from the British Library Research and Development Department, were a success.[7] The Library and Information Commission (LIC, predecessor to the MLA) recognised the potential of public libraries as routes to networked resources and as places to provide information literacy skills. By the time of the election of the Blair government in 1997 the LIC had a comprehensive plan of action that was presented in late 1998 to a government committed to exploiting electronic technologies. The proposal stressed the reach of public libraries, the cost-effectiveness of their services and the strong professional support across the country. The result was £170 million to build the People's Network, train all staff in new IT skills and create new digital content. It sat alongside a raft of other IT projects, such as a national grid for learning connecting all schools to the internet and an online university for skills development. As a result of the commitment and effort of library workers across the country, the People's Network project was completed on time and under budget, and continues, five years after completion, to be an essential element of the services of every public library in the land – collective action and professional coherence at their best.

Yet a programme that gave new opportunities to millions of people, that became self-sustaining once capital funds ended and where external evaluation produced rich evidence of how people's lives had changed[8] never really registered with key national policy-makers in education and in community and economic development, who should have seen in that success the potential of the public library as a central agent of future policy delivery. Other, less successful, programmes of development seemed to be the ones always discussed, despite the enthusiasm of

ministers and senior officials in the sponsoring Whitehall department (Culture, Media and Sport) and the lead taken by the Museums, Libraries and Archives Council (MLA) in managing and evaluating the People's Network programme. Bridging this gap is crucial to the future of England's public libraries.

Build a better narrative – the compelling story

Up to this point, much of the story has focused around what I have called 'the politics of professional coherence': the growing necessity of presenting the public library service as a single entity that can be aligned with national policy priorities. This is vital for two reasons. First, it illustrates how public libraries are vital to broader public policy, whether defending existing services or in delivering new opportunity through innovation. Second, in an age when we are faced with social turbulence and change, success depends on collective vision about what public services are able to do to help people to make decisions and understand choices. The voice of the public library must be heard above the competitive cacophony. English public libraries have shown significant progress in finding that strong voice, but even with a story as good as the People's Network it does not yet get consistently heard at the highest levels of government in relation to national agendas such as community development and learning for all.

Unless there is agreement to a shared vision across all England's 149 public library services, it will be impossible to make greater inroads into the big national policy agendas. During the first half of 2007 the MLA undertook consultation with public library service managers, service users and policy-makers to build that shared vision of the future public library service. The intention was to draw up a blueprint proposing the shared vision together with an action plan. There are two additional ingredients needed to facilitate the connections that come from good political intelligence: reliable and compelling evidence, and the ability to demonstrate public value. This work is still ongoing, but some suggestions and comments may be made about value and outcomes.

If a convincing story is to be told about the value of the public library service, it must be rooted in evidence that is reliable and relevant across all public libraries and can be articulated in an acceptable public value framework. Evidence need not be comprehensive. The skill lies in identifying what evidence will support most effectively the vision and action plan and resonate with national policy agendas. Traditionally, the national evidence base for public libraries has focused on quantifiable use data (loans, numbers of enquiries), service availability (opening

hours) and resource inputs (expenditure). There is a large national dataset of such information.[9] In the past five years this been supplemented by performance data from the public library standards (request fill rates, stock refresh rates, etc.), but almost all of these data fail to shine any light on how the public library provides outcomes for the individual and the community. The MLA has supported research that has investigated the role of the public library in the knowledge economy, highlighting the value chain that libraries can drive to support new economic activity within individual communities,[10] and also a study looking at the contingent economic value of museums, libraries and archives in a single local authority.[11] This technique seeks to demonstrate the value that the community places on the services provided by asking how much they would be prepared to pay if public funding was no longer available. A contingent value above the current levels of expenditure gives an indication of the effectiveness of the service; an argument in support of continued public funding.

None of this really addresses the issue of outcomes – what changes following service use. Recognising the importance of measuring outcomes, the MLA undertook a major study to develop a learning outcomes evaluation methodology. Inspiring Learning for All[12] (ILFA) has quickly become highly regarded nationally and is used regularly by public libraries to evaluate learning outcomes from programmes. ILFA is a radically new approach to evaluation, and has been taken up by organisations like the BBC and the National Trust as well as being used with great success to show the impact of the £150 million MLA Renaissance programme for regional museums. ILFA revealed clearly the high impact of Renaissance, and the programme has therefore gained support from a wide range of national politicians. It is a demonstration of what is possible that service managers must not ignore.

The creation of such evidence makes it much easier to demonstrate a 'public value chain' from input of resources through the delivery of service to the change that is brought about in individuals and communities. There are a number of variations to the original public value model developed by Mark Moore (1995). In England there has been a lively debate on the application of public value techniques. Research groups such as the Work Foundation[13] and Demos[14] have produced variations on the Moore model, and the BBC has implemented an approach that has created a 'public value test' for all new developments. For public libraries, clarity on the public value chain is as vital as the creation of good evidence. Within the cultural sector there has been an ongoing debate about the instrumentalism of public value:

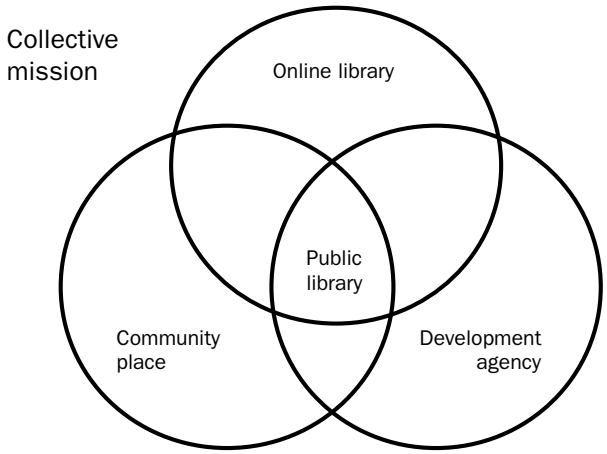
'How do you measure excitement, escape, pleasure, etc.?' 'Does it reduce cultural institutions merely to tools of government policy?' 'Better to focus on "art for art's sake".' 'The arts, the creative resources in libraries, museums and the like have a long-term, "intrinsic" value for society that cannot be counted and should just be accepted without further accountability.' Both instrumental and intrinsic value have merit, but the *realpolitik* of today's policy imperatives is outcomes-based. Politicians and policy-makers *always* want to see cause and effect: if this investment is made, what benefit is delivered?

In 2006 the Department of Communities and Local Government published *Strong and Prosperous Communities*, a white paper outlining the future policy framework, including key areas for service delivery. These areas provide a focus for how public libraries, along with other services, might engage and present their outcomes. The five strategic areas – children and young people, healthier communities, older people, economic development and the environment, and safer and stronger communities – will resonate with many public librarians, and the implementation of the white paper provides an important frame of reference for narrative development.

The final step in the processes of what I have called *policy intelligence* is finding the means of presenting a common story – the narrative – that can encapsulate the value of the public library in ways that will make a connection with those key policy priorities of government. I must stress that within the English context there are no conclusions about how this could be done. The MLA consultations that took place in 2007 produced a range of issues and priorities; many stressing the importance of not moving away from the core library values of learning, access to information and knowledge, escaping into a book, a place to go and so on. The reader wishing to see how this work progressed will need to refer to the MLA website.[15] Nevertheless, I will suggest a simple model that explains how the future roles of the public library might be presented to show three universal zones of engagement. I have described and discussed this model with many different audiences, and there has been general agreement that it helps to form a common understanding of what the effective public library will need to do.

Figure 4.1 shows the model. The three overlapping circles represent the three essential zones of activity. 'Community place' will continue to be at the heart of the public library's mission: a convivial place of knowledge and encounter, with the advice of well-trained, customer-focused staff. The 'online library' will be readily understood and the majority of public libraries now have a web presence giving access to

Figure 4.1 **The future roles of the public library**



commercial electronic resources along with council and community information. The 'development agency' role I see as the most important tool for connecting with wider government agendas. Public libraries have always been development agencies: supporting reading development and working with hard-to-reach groups, under-fives and parent/carers have long been the bread and butter of the business. Yet they are seldom articulated clearly as part of other people's programmes, whether education or community cohesion. That must change, and articulating the development agency role seems a natural way of making the change explicit. The model helps a collective view of what should be done locally, what could be done nationally. Online is a good example of where a single, national management framework might produce long-term economies of scale. The MLA has already negotiated for all English public libraries to have low-cost access to electronic reference resources.

Conclusions

This chapter has described work in progress and ideas, and therefore cannot produce a set of definitive conclusions. I started by pointing out the importance of political awareness and changing the perception of public libraries in government. If that does not happen, I said the future

may be gloomy; and if that is true for England, it may be true in other places. I will conclude by making some very brief comments on behaviours and skills in the twenty-first century.

First of all libraries, not just public libraries, will need to see themselves as knowledge institutions, players in a world of knowledge that stretches across libraries, museums, archives, the broadcast media and the internet. Everyone must share a view on how libraries fit in. Yes, as knowledge warehouses, but also as the 'junction boxes' creating connections between people and knowledge; yes, working closely with other institutions, but most of all cherishing the trust that society has in public libraries. That will be a precious asset in the future.

Second, public libraries will have to form many more alliances with other knowledge institutions, but also with other development agencies – health, education, economy and community – to build long-term partnerships. Collective working focused on user need should be the mark of the successful library service.

Finally, what about those managing and working in public libraries? Naturally, the organisation and exploitation of knowledge will dominate, but also that ability to help people, interpreting need and matching resource, answering the impossible question, which is the magic librarians work every day. However, there will be a need for more mixed-discipline teams, and libraries will need radical risk-takers around to 'push out the envelope' and people who can reflect and think about the future. There will need to be more pragmatic project managers who can sustain innovation, and finally, and most important of all, there will be as there has always been the need for passionate advocates.

Really, all that I have described above are building blocks for effective advocacy – getting the convincing narrative into the ears of the right people. In my experience 'passion' is not a word generally used much in textbooks on librarianship, and yet it may be the factor that makes the difference. Passionate belief in the narrative will make the difference when telling it to people who will have heard half a dozen other stories that day already. Such advocacy is not the responsibility of someone else. The sense of mission that so inspired the pioneers of public libraries in Victorian times is needed now more than ever. Public libraries can have a great future in this century, but it will come more than anything from collective advocacy, engagement with wider policy agendas and a firm grasp of the political realities of the world that public libraries now inhabit.

Notes

1. For example, www.lovelibraries.co.uk.
2. See www.designinglibraries.org.uk.
3. See www.culture.gov.uk/Reference_library/Publications/archive_2003/framework_future.htm.
4. Full details are available at www.mla.gov.uk/website/programmes/framework.
5. See www.mla.gov.uk/website/programmes/framework/framework_programmes/leadership_and_workforce/.
6. See www.mla.gov.uk/website/publications/browse_by_date/2005.
7. See www.ifla.org/IV/ifla61/61-batc.htm.
8. See www.mla.gov.uk/resources/assets//I/id1414rep_pdf_6707.pdf.
9. See www.cipfastats.net/leisure/publiclibraryactuals/content/2004-05/standards.pdf.
10. See www.mla.gov.uk/resources/assets//P/Public_libraries_in_the_knowledge_economy_10180.pdf.
11. See www.mlanorthwest.org.uk/assets/documents/100001D5MLA_Bolton2.pdf.
12. See www.inspiringlearningforall.org.uk.
13. See www.theworkfoundation.com/Assets/PDFs/pvexec_summary.pdf.
14. See www.demos.co.uk/publications.
15. See www.mla.gov.uk.

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5

Public library development in New South Wales

David J. Jones

Today every citizen in New South Wales has access to public library services through a sophisticated network, a partnership between local and state governments. Free public libraries are so much part of our lives, from pre-school days until our retirement years, that it may seem as if they have always been there. In fact, free public libraries in New South Wales only began to operate in any numbers after the end of the Second World War – just 60 years ago.

Why did it take so long here, bearing in mind that free public libraries were commonplace in the UK and the USA even in the nineteenth century? What prompted the change of climate in the 1930s and 1940s? The development of free public libraries in New South Wales is a fascinating mix of individual vision, professional action, community mobilisation and political will.

Good in parts: libraries in nineteenth-century New South Wales

'In a colony which contains only a few hundred hovels built of twigs and mud, we feel consequential enough already to talk of a treasury, an admiralty, a public library, and many other edifices, which are to form part of a magnificent square,' wrote Watkin Tench ([1791] 1961: 246), three years after the establishment of the convict settlement at Sydney Cove. At the time the idea of a grand public library containing books which all people could freely use must have seemed far-fetched. But as the colony became less precarious, thoughts turned to libraries as a way

of diffusing useful knowledge, as well as saving souls. In 1809 the Reverend Samuel Marsden advertised in England for donations to help found a 'Lending Library for the general benefit of the inhabitants of New South Wales'. The library would cover 'Divinity and Morals, History, Voyages and Travels, Agriculture in all its branches, Mineralogy and Practical Mechanics'. Although he did return to Australia with a number of donations to the 'Port Jackson Lending Library', some of which survive today in the library of Moore Theological College, no public institution actually resulted.

A number of commercial reading rooms and circulating libraries for those able to pay did begin operating, first in Sydney and later in other centres of population. From the 1830s there were also mechanics' institutes, schools of arts, athenaeums and literary institutes, most of which included a library. One of these was the Sydney Mechanics' School of Arts, dating from 1833 and still in existence. Only subscribers were normally permitted to borrow, although as a condition of local or colonial government financial assistance citizens were sometimes allowed to read items on the premises free of charge. By the end of the nineteenth century there were over a thousand institutions of this type in all parts of Australia.

By the mid-nineteenth century the free public library idea was already gaining ground in England and Wales, where the Public Libraries Act of 1850 enabled local authorities to use public funds to establish and maintain libraries. In Australia, however, it was a colonial government, Victoria, which made the first move into free public library services with the opening of the Melbourne Public Library (the forerunner of the State Library of Victoria) in 1856. This was purely a reference library, only available to people who called in person.

The Free Public Library, Sydney

In New South Wales it was several years before the government followed suit, purchasing a virtually bankrupt subscription library. In September 1869 it reopened as the Free Public Library, Sydney, the first truly public library in New South Wales. (It was later known as the Public Library of New South Wales, then the Library of New South Wales and is now the State Library of New South Wales.)

Public reaction to the new library was enthusiastic: 60,000 people signed the visitors' book in its first year of operation. In 1877 the Free Public Library opened a lending branch available to people who lived

within about a ten-mile (16-kilometre) radius of the centre of Sydney. By the standards of the time it was a popular facility – by 1890 50,000 people a year were visiting the lending branch. The library also began to lend boxes of books to distant institutes. A little later, books from a separate country circulation department were lent to individuals living outside the Sydney metropolitan area.

The Municipalities Act

In the meantime local councils were showing little spontaneous interest in establishing and maintaining free libraries, although the Municipalities Act of 1867 in New South Wales empowered them to do so. As a stimulus the government offered non-recurrent grants of £100 or £200 to buy a basic reference collection or to furnish a reading room in the town hall. The first council to take up this offer in New South Wales was the Municipal Council of Newtown. On 21 June 1869 its free reference library was opened by Henry Parkes, author of the free public library clauses in the Act. Over the next 30 years many such libraries were established under this and later Acts, all simply collections of reference books in a room in the town hall. The government made no provision to maintain them: it was hoped that voluntary endowments and local rates would assure their future, but this was wishful thinking. Of the 67 local public libraries established under various local government Acts in New South Wales in the nineteenth century, not one survived into the twentieth.

A mixed bag

So it was that, a century after Tench envisioned a Sydney metropolis with a library as one of the signs of civilisation, public libraries in New South Wales were a very mixed bag. There was the Free Public Library, Sydney, with its lending branch, travelling boxes of books and loans to individuals in remoter parts of the state. There were a few town-hall-based reference libraries, under-resourced, underutilised and mouldering away. And there were literally hundreds of subscription libraries within athenaeums, schools of arts and mechanics' and literary institutes, with continuing colonial and occasionally local government subsidies to supplement their membership fees. Many of these were at the time well

run, but their membership represented only a small proportion of the local population.

Odd as it may seem to us today, there is little evidence of serious dissatisfaction with the libraries available. There was little public pressure to open new free libraries, and a consequent lack of official and political interest. Libraries were still generally seen as a colonial government-funded operation and there remained a distinct reluctance on the part of local authorities to take on increased responsibilities by developing and maintaining local public libraries. In Sydney the local councils could point out that reference and lending services were already available from the Public Library of New South Wales.

As for the library profession, it had not developed to the extent where practitioners could put the case for free library development. They would not begin to do so in earnest until well into the twentieth century, when key practitioners, lay people and prophets from abroad would so mobilise public opinion that governments, local and state, would be obliged to act.

Steady as she goes: the early twentieth century

Following the handover of the lending branch of the Public Library of New South Wales to the Municipal Council of Sydney, a new institution – the Sydney Municipal Library (now the City of Sydney Library) – opened in 1909. Although funded entirely by the municipal council out of its rate income, it was open to all Sydney residents, including those from suburban municipalities. Together with the free public library at Broken Hill in western New South Wales, dating from 1906, the Sydney Municipal Library was destined to be one of only two free public lending libraries in New South Wales to survive the Great Depression and beyond.

Charles Bertie (1928: 15) transformed the municipal library from 'a library over which hung a pall of dirt and decay'. He had the library cleaned, furniture repolished, washable covers bought for the magazines, a floor built for a new open access collection and electric lighting installed. He opened a separate children's library. His reference staff fielded questions on subjects as diverse as leather manufacture, organ playing, cabinetmaking, education, democracy, the economic value of the eucalyptus, poultry and grain handling. Between 1910 and 1911

circulation doubled. In a little over ten years the library budget quadrupled. By 1918 each volume was lent an average of 13 times per year and the collection was simply wearing out. In the mid-1920s the library was performing valiantly, but was a victim of its own success and was reluctant to advertise its services.

Schools of arts examined

Meanwhile the schools of arts continued to provide their partial library services in the suburbs and country towns. In 1912 a New South Wales committee was set up to examine whether the £10,000 subsidy paid annually by the government to schools of arts and similar institutions was money well spent. It was not: book resources were meagre, especially non-fiction, services were limited and the committee recommended phasing out or reducing subsidies in metropolitan areas and municipalities. They also recommended encouraging local authorities to take over schools of arts 'in accordance with the practice which obtains in the large cities of the old world, where Public Libraries are maintained and controlled by the Municipalities' (New South Wales, 1912). In the event these recommendations were not implemented, thanks to powerful local lobbying. Government subsidies to schools of arts continued to be paid right up to the time of the Great Depression, while the question of free public libraries was studiously avoided.

The Munn-Pitt Report

For Charles Bertie at the Sydney Municipal Library there was 'at least one redeeming feature of the depression, in so far as it has turned the thoughts of people towards the value and solace of books' (Sydney Municipal Library, 1934: 1). There was growing awareness of the value of free public libraries across a broad spectrum of society, urban and rural. The ground was prepared for a constructive approach, but not before the intervention of an overseas expert.

As part of its grants programme the Carnegie Corporation of New York had been interested in Australian education for many years. In 1932, after receiving an assurance that there was widespread support among Australian library authorities, the corporation agreed to fund a survey of Australian libraries. A leading American librarian, Ralph

Munn, director of the Carnegie Library of Pittsburgh, was appointed to carry out the survey, with the assistance of E.R. Pitt, principal librarian of the Public Library of Victoria. Over two months in 1934 Munn and Pitt inspected more than 100 libraries around Australia, and reviewed 1,500 questionnaires sent to all known libraries in Australia.

Their report was released in January 1935. It was scathing. The 'wretched little institutes' had in most states become 'cemeteries of old and forgotten books' (Munn and Pitt, 1935: 24). The institutes' limited access for the public, untrained staff, poor collections, general lack of non-fiction, absence of catalogues and poor record of service to children all came in for criticism. Some excellent work was being done by the municipal lending libraries, notably at Sydney and Prahran in Victoria, but they were pitifully few in number.

The significance of the Munn-Pitt Report lay not so much in the presentation of a general blueprint for development – as time has shown, library services have in fact developed very differently and at a varied pace in different states – but in the shock of its trenchant criticism by an informed and impartial observer. As later commentators expressed it, 'we required the prophet from abroad, and fortunately he came'. The words of the prophet were powerful propaganda for a free public library system. What was needed now was a band of evangelists.

The Free Library Movement

In June 1935 there was a decisive first step: 40 representatives of local parents and citizens' and progress associations met at Chatswood-Willoughby School of Arts in Sydney, and the Free Library Movement was born. Its objectives were simple: 'To advocate and work for the establishment of Free Libraries. To create and foster public opinion on the value of Free Libraries' (Free Library Movement, 1935: 2).

The Free Library Movement was broad-based and decentralised, with branches formed by representatives of progress associations, teachers, members of parliament of all political persuasions, local councillors, the Country Women's Association, the United Associations of Women, business groups, the Returned Sailors and Soldiers League, Rotary and other service clubs, trade unions and parents' and citizens' associations. 'Under Australian conditions it is no mean achievement to secure the support on the one hand of the Chamber of Commerce and the Bank of New South Wales, and on the other hand the support of the militant

members of the Labour and Trade Union Movements', wrote Geoffrey Remington (1937), a Sydney solicitor and businessman and the movement's chief lobbyist.

Remington and John Metcalfe, deputy principal librarian of the Public Library of New South Wales, embarked on a campaign to spread the word across New South Wales and beyond. Branches sprang up rapidly: by the end of 1938 there were branches at Ashbury, Chatswood-Willoughby, Casino, Muswellbrook, North Sydney, Lane Cove, Wagga Wagga, Orange, Bathurst, Newcastle, Maitland and Cessnock. Movements were established in Queensland and Victoria in 1937 and in Tasmania in the following year, but not until 1944 in Western Australia and 1949 in South Australia.

A great strength of the movement was that it was a lay organisation, not a lobby group of professionals promoting their own interests. Librarians like John Metcalfe were certainly involved, but only informally. Librarians, also stimulated by the Munn-Pitt Report, were in the process of establishing their own professional organisation, the Australian Institute of Librarians, founded in 1937 'to unite persons engaged in library work, and to improve the standard of librarianship and the status of the library profession in Australia' (Australian Institute of Librarians, 1939: 9). So while the Australian Institute of Librarians set about addressing issues such as professional training and communication, the Free Library Movement pursued promotion and lobbying.

The Libraries Advisory Committee

Reaction in New South Wales was speedy. In June 1937 the Minister for Education, D.H. Drummond, appointed a committee, including representatives of the Free Library Movement, to examine ways to improve library services and prepare draft legislation. In the following year the Libraries Advisory Committee presented its report, providing a formula for the state government to subsidise local councils which established free libraries, subject to standards set by a new library board. Staff would be trained at a new library school at the Public Library of New South Wales. The government would not compel councils to establish free libraries, but a poll of electors could oblige a council to do so. Smaller councils would be encouraged to join other councils in creating sustainable library services. Cabinet met on 18 January 1939 and unanimously adopted the report in principle, setting the parliamentary draftsman to work on a library Bill.

Deciding on subsidies

The committee agonised over the principles of subsidy. They rejected a fixed subsidy because that would have given just as much assistance to wealthy districts as to poor ones. Finally they decided use the unimproved capital value (UCV) of properties in the local government area as the basis for calculating the local contribution. This would be topped up by a government subsidy so that the minimum total expenditure would be two shillings (20 cents) per head. The subsidy would be on a sliding scale, starting at sixpence (5 cents) per head of population and ranging up to a shilling (10 cents). If councils were unable to raise the equivalent of 1s 6d per head, they would receive a higher subsidy. The government subsidy would therefore range from 25 to 50 per cent, and the local government contribution from 50 to 75 per cent, with the higher subsidy applying to the less wealthy shires and municipalities. (In later years a combination of per capita subsidy and other components was introduced.)

The Library Act

With the declaration of war on 3 September 1939 free libraries faded into the background and Cabinet decided to defer the library Bill. Dismayed, Remington and W.H. Ifould, the principal librarian, immediately began lobbying the minister, the premier and the opposition leader. They also canvassed friends and supporters of the Free Library Movement: the Taxpayers' Association, newspaper editors, business leaders and members of the Australian Club. Threatening to resign and mount a media campaign against the government, Ifould (1939) urged his minister to 'stick to the library Bill and press Cabinet to go on with it, even if you have to provide for the government subsidy not to be operative until a date to be fixed in the future'.

When they met in October, Cabinet agreed to this compromise, and in the early hours of 3 November 1939 the library Bill finally passed through the New South Wales Parliament with bipartisan support. It was proclaimed on 22 December 1939 and was planned to take effect, except for its financial clauses, in six months' time.

June 1940 was the ill-starred month of the Dunkirk evacuation, the German occupation of Paris, Italy's entry into the war and the French capitulation. Any hopes that the library board and local councils would

immediately set up a free library system in New South Wales were dashed, and the outbreak of war in the Pacific the following year prolonged the delay. Serious thoughts did not turn to free public libraries until the tide of war eventually began to turn. In November 1943, at the official opening of the new Public Library of New South Wales building, William McKell, the New South Wales premier, announced that the Library Act would be fully proclaimed from 1 January 1944.

The Act takes hold

The impact of the Act was startling. Within 18 months 32 New South Wales councils had adopted the Act and seven were already providing library services. Sixteen were planning to begin operation during 1945. The financial arrangements were working smoothly. The dream of total coverage of the state by free public libraries was becoming a reality. By the end of 1946 a quarter of the 3 million inhabitants of New South Wales were being served by a free public library.

In the 1950s and 1960s more and more local authorities adopted the Library Act and set up free library services. Many took the option of forming cooperative library services to benefit from economies of scale and share resources. In the 1970s several regional libraries were established in rural areas, bringing viable library services to smaller communities. The missing pieces of the library jigsaw were gradually being filled in. In 1992 the adoption of the Act by the New South Wales shire of Junee was hailed as the final step towards a complete network, but this was not quite the case. The huge and sparsely populated Central Darling shire does not have its own library service, but its population is able to use the resources of the pioneering Broken Hill Public Library through its outback letterbox library service.

The library services of today are a far cry from the earliest free public libraries set up towards the end of the Second World War. Their collections and services have expanded, along with their popularity. Their buildings have generally grown and are much more user-friendly by today's standards. They have added new media and new technology to meet the needs of their communities and innovative programmes for target groups. They have well-trained and highly professional staff. They contribute to the social and economic well-being of their localities. They are a highly valued and respected part of their communities.

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6

Libraries in the South Pacific

Paula H. Jones

The nature of the Pacific Ocean and its islands is central to any discussion of the development of libraries in the South Pacific. The vastness of the Pacific has isolated the islands within it, and this in turn has shaped the history and development of these island countries, from the earliest inhabitants to the colonisers and missionaries and later the dependent and independent nations that make up the group of islands known as Oceania.

This chapter looks at the nature of politics and libraries in that part of Oceania generally referred to as the 'South Pacific', although this term does include the Marshall Islands, which are north of the equator, and Kiribati, which lies along the equator. The countries include the Cook Islands, Fiji, Kiribati, the Marshall Islands, Nauru, Niue, Samoa, the Solomon Islands, Tokelau, Tonga, Tuvalu and Vanuatu. Excluded from examination are Australia, New Zealand, Papua New Guinea, French Polynesia and those countries coming under the sphere of influence of the USA (American Samoa, the Federated States of Micronesia, Guam, Palau and the North Mariana Islands).

The countries of the South Pacific share the isolation of distance, a history of colonialism and commonalities of culture. Conventionally, there are three cultural groups: Melanesia (Papua New Guinea, New Caledonia, the Solomons, Vanuatu and Fiji), Micronesia (Northern Marianas, Palau, Marshall Islands, Kiribati, Nauru, Guam and the Federated States of Micronesia) and Polynesia (Hawaii, New Zealand, Easter Island, Samoa, Tuvalu, Tokelau, Tonga, Wallis and Futuna, the Cook Islands, French Polynesia, Pitcairn Island, American Samoa, Niue and the eastern parts of Fiji). In reality, the mix of cultures within these three ethno-divisions is a lot more diverse, reflecting the history of Pacific exploration that pre-dates European contact. There are about

1,400 languages spoken in the Pacific – 25 per cent of the total languages of the world (Lynch, 1998: 25).

Despite the apparent difference in cultures, all countries of the South Pacific recognise a commonality of culture, often called 'the Pacific way'. All the indigenous peoples of the South Pacific were oral in tradition. Writing was introduced after European contact. The oral tradition has a bearing upon the development of libraries, in so far as there is no history of a compelling need for written records among these cultures, and this contributes to the marginalisation of libraries that we see within this region.

With European contact came other cultures: Europeans in the form of sailors and traders, and later missionaries, administrators and settlers; East Indians from India were brought into Fiji as indentured labour to work the cane fields from 1875; Chinese first settled as traders and shopkeepers in Fiji from the late nineteenth century. Throughout the South Pacific, various groups have migrated and settled, such as the Chinese in Samoa, the Solomon Islands and Fiji, Tongans in Kiribati and Fiji and the i-Kiribati (formerly the Gilbertese) in the Solomon Islands.

Most South Pacific countries came under colonial rule. Fiji ceded to Britain in 1874 and was a British crown colony until independence in 1970 (Douglas, 1994: 200–2). Samoa has been variously administered by the USA, Germany and New Zealand, before gaining independence in 1962 (ibid.: 749–52). The Solomon Islands had a series of colonial administrators and conquerors: Germany and Australia (late nineteenth and early twentieth centuries), Japanese occupiers during the Second World War and Britain (late nineteenth century until independence in 1978) (MacNeill, 2000: 106–10, 149–55, 184–6).

Similarly the Marshall Islands were a German protectorate, occupied by the Japanese during the First World War and remaining in their possession until the Second World War when US forces occupied the chief atoll, Majuro. The Marshalls remained under US control until they became a self-governing republic in 1979 (Douglas, 1994: 391–3). They still retain close links with the USA, which has conducted nuclear testing there since 1946. Vanuatu was jointly administered by France and Britain in one form or another from 1888, and became independent in 1980 (ibid.: 708–10).

The Gilbert and Ellice Islands were originally a British protectorate and later a colony, before establishing themselves as the two independent nations of Tuvalu (1978) (ibid.: 648) and Kiribati (1979) (ibid.: 361). Nauru was annexed by Germany in the late nineteenth century, surrendered to Australia at the end of the First World War, transferred to

Britain shortly afterwards, then was occupied by the Japanese during the Second World War and administered by Australia until its independence in 1968 (ibid.: 407–10). A number of countries remain self-governing in free association with New Zealand, e.g. the Cook Islands (2007) and Niue (2007). The tiniest country of the South Pacific, Tokelau, voted by a small majority in a referendum on 24 October 2007 to remain a colony of New Zealand and not become a self-governing nation in free association with New Zealand (United Nations, 2007). The hereditary monarchy of Tonga was a British protectorate from 1900 until 1970 (Douglas, 1994: 651–2).

This plethora of colonial and other governments with historical and administrative links to the South Pacific countries becomes significant when we look at the development of libraries within the region.

The forms of government for the South Pacific countries vary, from Tonga, a hereditary monarchy, and the Solomon Islands, Samoa and Tuvalu, which are constitutional monarchies, to republics such as Kiribati, Nauru, Vanuatu, Fiji and the Marshall Islands. Countries such as Niue and the Cook Islands remain self-governing in free association with New Zealand, while Tokelau is a New Zealand colony. Nationalism runs strongly in these countries, which are proud of their unique Pacific heritage. At times this nationalism sits uneasily with their former administrators, on whom South Pacific countries are still heavily dependent for aid.

Libraries in the region

The development of libraries in the region initially reflects the colonial administrations, and then later we see the development of national institutions after independence. Early libraries were established by missionaries, closely followed by some forms of subscription libraries. In Suva the current public library was established in 1908 with a Carnegie grant. In the twentieth century archives were established, arising out of colonial administration, notably the Central (later National) Archives of Fiji.

As South Pacific countries moved towards independence, the concept of national libraries became more attractive and a number of national archives and libraries were established after the 1960s: Solomon Island Archives, 1974; Solomon Islands National Library, 1979; Kiribati National Library and Archives, 1979; Tuvalu National Library, 1979; Cook Islands National Library, 1992 (Simmons, 1993: 3); Vanuatu National Library, 2005.[1] Countries which have a legal deposit Act include Fiji (1972), where published printed material is deposited in the

Library of the National Archives and the University of the South Pacific Library, the Solomon Islands (1972, revised 1995) and Vanuatu (1974, revised 1988) (Simmons 1993: 3). Fiji to date has not established a national library, though it has been mooted a number of times since the 1960s, most recently in 2005 by the then Minister for Information (*Fiji Times*, 2005). However, the military coup in December 2006 (Fiji's fourth since 1987) prevented this from moving ahead.

Public libraries in the region are sometimes attached to national libraries, which provide lending services – for example Kiribati National Library. Samoa's public library is the Nelson Memorial Library. Fiji has 11 public libraries, including Suva City Library. Seven of these are administered by the Library Service of Fiji (LSF), an agency of the Ministry of Education set up in 1964 to help establish school (and later public) libraries in Fiji. The rest are run by town councils.

During the time of colonial administrations, libraries were often set up with experienced librarians from overseas brought in to establish and run these new facilities. Fiji is a case in point – in his book *Libraries and Archives in Fiji: A Chronology*, W.J. Plumbe (1984) documents the establishment of many libraries in the public, government, school and academic arenas. Up to the mid-1960s the professional librarians were usually of European origin; gradually since then local people have been sent overseas to train as librarians.

Many of the libraries that were established during colonial times were initially supported by grants from aid agencies, with the expectation that the appropriate parent organisations would take up responsibility for their upkeep and running. For example, Western Regional Library (Fiji) was established with a grant from the British Council. Libraries within the region continue to attract aid funding – for example, Suva City Library has received substantial aid from Japan and New Zealand in the past ten years.

Libraries in the doldrums

School libraries throughout the region have remained the least developed of all libraries. Countries such as Kiribati and Fiji provide a school library service. The Library Service of Fiji (LSF) was set up by the Ministry of Education in the mid-1960s expressly to help develop and support school libraries. The lack of achievement in this area reflects some problems common to the development of school libraries

throughout the region. In 2000 the Fiji Library Association made a submission that was critical of the LSF's work to the Fiji Islands Education Commission:

> Library Service of Fiji (LSF) has been in existence since 1964, yet very little seems to have been achieved in the sustained development and improvement of school libraries...
>
> Various reasons may be cited for this, such as poor or indifferent management and leadership with Library Service of Fiji, insufficient funding, and lack of trained and qualified library personnel... One consequence is that LSF staff with little or no library training advise schools on library development.
>
> However, we feel the chief reason for the lack of real impact on Fiji's libraries is that there has been little real understanding by the Ministry of Education of the role of libraries and resources in education. Therefore Library Service of Fiji has been operating in isolation from the mainstream education services. (Jones et al., 2000: 4)

In fact, this lack of understanding is at the heart of the problems of overall library development throughout the region. Governments and parent organisations in general do not perceive the crucial role libraries play in developing literacy, information literacy and lifelong learning skills.

The situation for public libraries is marginally better. Some public libraries, such as Samoa's Nelson Memorial Library which acts as a *de facto* national library, are very active and take the lead in helping libraries in their countries develop. But for the most part public libraries struggle to achieve basic services for their patrons. There are many reasons for this. In particular, public libraries:

- are underfunded (Suva City Library has not had a book budget since 1988), and rely upon donations of books and other materials;
- lack qualified professional librarians at the helm;
- very often are staffed by unqualified people;
- are insufficiently staffed by para-professionals;
- have poor-quality facilities;
- are generally manually operated (although Nelson Memorial Library and Cook Islands National Library have recently installed Koha with the help of UNESCO and the University of the South Pacific);

- provide limited services;
- offer very few activities such as regular story times;
- lack internet connectivity and hence cannot offer information literacy programmes (Suva City Library, with the Fiji government Information Technology Services, has for several years been running a programme to teach internet skills to school students, but as the staff have very little internet training and experience, the connection is very slow and the training numbers per computer are large, the success of this is debatable);
- operate in isolation because there are no government policies in place that give them a firm role to play in the economic and intellectual development of the nation.

The national libraries, many of which are in reality public libraries, suffer similar problems. Not one national library is staffed by a professional librarian. All are underfunded and are unable to provide much leadership when it comes to developing the libraries in their countries. There are exceptions – for example, the National Library of Vanuatu, which is part of the Vanuatu Cultural Centre, along with the National Museum and the National Photo, Film & Sound Archive. The library and centre have a dynamic website and are very active in promoting libraries in Vanuatu.

Library training in the region

There is no training at a professional level offered in the South Pacific. Potential librarians must study abroad. One reason for this is that there are so few professional library positions in the region. At the last count there were 32 positions, of which 22 are attached to the University of the South Pacific (17 at USP Library, Laucala Campus, four at USP campuses regionally and one at PRIDE – Pacific Regional Initiatives for the Delivery of Basic Education). Eight of the ten remaining positions are within Fiji; of these, seven remain unfilled by professional librarians. The last two posts are in Samoa, and both are filled by professional librarians.

In fact, USP Library management prefers to train its future librarians through graduate traineeships whereby several young graduates (who hold a basic degree in any discipline) are identified and sent for training at postgraduate diploma or master's level. In this way, the library's future librarians are exposed to best practices in the countries where they study.

USP Library has successfully trained many of its professional librarians through this scheme, including the former university librarian (now acting vice-chancellor), the present university librarian and the deputy university librarian. A number of USP librarians gained their professional qualifications this way.

Para-professional and vocational training

The University of the South Pacific is the only organisation offering formal library qualifications for library assistants and attendants. There are two programmes, offered solely by distance – the Diploma in Library/ Information Studies, which is at academic level for para-professional library assistants, and the Certificate in Basic Skills in Library/Information Studies, a vocational programme that trains library attendants. There have been over 200 diploma graduates since it was first offered in 1990, and over 200 graduates with the certificate, which was first offered in 1998.

Levels of staffing in South Pacific libraries

There is a serious lack of qualified library staff at all levels in all libraries, with the exception of a very few, such as USP Library (Laucala Campus) and Fiji School of Medicine Library. Some diploma graduates head public libraries and staff government and special libraries. School libraries have very few qualified staff, and many schools employ totally unqualified and inexperienced library staff at the lowest possible wages, or assign library duties to teachers, often teachers of English. Consequently, the poor image of libraries and library staff is constantly being reinforced, entrenching negative viewpoints that result in no budgets and poor facilities. And so the cycle continues.

Library associations

Fiji Library Association (FLA) has played a significant role in the past in helping libraries develop within Fiji. In particular, it produced *Standards for Fiji Libraries* (Fiji Library Association, 2003), a document that has been largely ignored by government agencies in Fiji. Currently FLA is virtually inactive. Other library associations (for example, Vanuatu, Tonga, Kiribati, Samoa and the Marshall Islands) organise activities for

their members and are sometimes able to sponsor members to attend meetings such as PIALA's annual conference. PIALA (Pacific Islands Association of Libraries and Archives) is active in the northern Pacific, but because of the huge cost of airfares attendance by South Pacific representatives at PIALA conferences is rare (an exception being the Marshall Islands, which are in the northern hemisphere). With the exception of FLA, PIALA and Vanuatu, these associations have no strong professional leadership and their activities are more localised than national. They have little voice when it comes to influencing the decision-makers in their countries.

Regional efforts to improve libraries

A number of regional organisations play a significant role in library development in the South Pacific. The premier regional organisation is the Pacific Islands Forum, usually referred to as 'The Forum', with an administrative secretariat based in Suva. Established in 1971, it represents the heads of government of all the independent and self-governing Pacific countries, together with Australia and New Zealand. The forum describes itself as 'the region's premier political and economic policy organisation' (Pacific Islands Forum Secretariat, 2007). It meets each year at head of government level to discuss issues of concern to the Pacific. Additional meetings are held periodically at ministerial level – for example, the Forum Education Ministers' Meeting.

The Pacific Islands Forum provides the framework by which changes of direction in strategic government planning are made at a regional level. The forum has not played a direct role in the development of libraries in the South Pacific; significantly, it has no library adviser. However, regional concerns about basic education in member countries have led to a much higher profile for education and to a certain degree libraries (Pacific Islands Forum Secretariat, 2001). This is reflected in the strategic education plans of some of the countries, where libraries are recognised as being an essential component of teaching and learning.

The Pacific Community is one of the oldest regional organisations in the world. It began in 1947 as the South Pacific Commission (SPC). In 1997 it changed its name to the Pacific Community, with a secretariat, and is still commonly referred to as the SPC (Secretariat of the Pacific Community). Its headquarters and main library are in New Caledonia, with a smaller library based in Suva.

Where the forum is policy-oriented, the SPC's focus is on programmes to achieve its mission to 'help Pacific Island people make and implement informed decisions about their future' (Secretariat of the Pacific Community, 2007: 1). Therefore the SPC offers an extensive range of programmes in areas such as agriculture, forestry, crop production and health. The SPC librarian has traditionally been involved with regional efforts to improve libraries and has represented the SPC and the Pacific at regional and international forums.

USP Library

USP Library has had an important part to play in the development of libraries in Fiji and the region since it was first established in 1968 at the Laucala Campus in Suva. It is the pre-eminent library in the region, and is funded and staffed appropriately for an academic institution of its size. It has relocated twice since 1968: first in 1972, to a new building funded by the British government, and later in 1988 to its current site, funded by AusAID. In 1971 Fiji enacted a legal deposit Act whereby two copies of published works were to be deposited with the USP Library and the Library of the National Archives (the collection of the latter to form the core of a Fiji national library should one ever be established). The university, which offers a large number of courses and programmes by distance learning, has 21 campuses and centres throughout the region, with a major campus in Vanuatu and another in Samoa. All campuses have libraries that are supported centrally by Laucala in terms of collection development. Library staffing, however, is the responsibility of individual campuses.

USP Library has been involved in many of the important developments and initiatives in libraries in the region, and has taken a leading role in many of the regional committees and meetings relating to library development. Like the SPC librarian, the university librarian has represented the region at international forums.

Standing Conference of Pacific Libraries (SCOPAL)

SCOPAL was an informal network of libraries first established in 1978. The SPC and USP were prominent among its members, who also

included heads of national and major libraries in the region, University of Hawaii Library and the National Library of New Zealand. It aimed to 'give a unified regional voice to widely scattered national library services, and to act as a catalyst, clearinghouse and coordinator for regional library-based information projects' (Anonymous, 1992: 1). Arising out of its efforts, the Pacific Information Centre (PIC) and Pacific Islands Marine Resource Information System (PIMRIS) were established. SCOPAL also acted as a lobby to get a library/information diploma programme established at USP.

From 1991 to 1994 there were attempts to establish SCOPAL on a more formal basis and funding was sought for a secretariat, to be based at USP. However, the project could not attract sufficient funding and SCOPAL lapsed. Its aims were worthy, but without a solid base its achievements were limited. It was also plagued with problems of communications. Pacific airspace is very expensive, so SCOPAL members communicated by fax, telephone and satellite PEACESAT meetings rather than face to face. Scattered throughout the minutes of meetings are references to poor attendances at the PEACESAT meetings, miscommunications and rescheduled meetings. Without a permanent base and because of communication difficulties, projects such as SCOPAL suffer from a natural inertia and lapse over time.

Pacific Information Centre (PIC)

The Pacific Information Centre is an example of a regional initiative that arose out of SCOPAL. It was intended to be the mechanism by which SCOPAL could achieve its aims. PIC was set up in 1983 as a unit within USP Library. It was funded by the IDRC in full from 1983 to 1991, after which USP Library absorbed the costs of staffing and operating the centre.

PIC's stated goal was to 'promote and develop self-reliance in access to information among the peoples of the South Pacific' (University of the South Pacific, 1982: 1). For 21 years PIC was responsible for the production of a number of very important bibliographies, such as the *South Pacific Bibliography* and the database South Pacific Periodicals Index, as well as numerous subject-oriented bibliographies. However, there was insufficient funding for the PIC librarian to visit the region and lobby ministries and organisations to improve their libraries.

In 2004 the Pacific Information Centre closed. The difficulty of obtaining a librarian with bibliographic indexing and cataloguing skills was the catalyst for the closure. In a memo to staff, USP university

librarian Sin Joan Yee stated, 'after a review of PIC's functions and products, the USP Library decided to close the Pacific Information Centre (PIC). It was felt that there is now a lesser need for print bibliographies as a result of technology and online catalogues' (Yee, 2004: 1). USP Library therefore absorbed or reshaped many of PIC's bibliographic functions.

Pacific Regional Initiatives for the Delivery of Basic Education (PRIDE)

The PRIDE Project arose out of the Forum Education Ministers' Meeting in New Zealand in 2001, which drew up the *Forum Basic Education Action Plan 2001* (Pacific Islands Forum Secretariat, 2001). A direct consequence of that document was the establishment of PRIDE within USP's Institute of Education, and it was generously funded by the European Union and New Zealand. PRIDE is implemented in two phases: Phase One (operational) runs from 2004 to 2009; Phase Two (closure) will run from 2010 to 2011. PRIDE aims to help countries develop strategies for their education sectors and implement some of these.

As part of the PRIDE Project, a library/information specialist was employed to establish a virtual library of key education documents and make this accessible electronically, and liaise with teachers and other educators on 'best practices'. Consequently, the information officer, a librarian, Elizabeth Cass, has been able to visit and liaise directly with key personnel in education sectors across the region, highlighting the need for policies that include libraries. Ironically, PRIDE has been able to achieve some of SCOPAL's and PIC's major objectives, because PRIDE has been appropriately funded. Already this is having a positive effect on the development of libraries in the region – some national planning documents now reflect the need for positive action to develop school libraries and staff.

CLAIM

A very recent development has been the establishment of CLAIM – CROP Library and Information Management Working Group. The Council of Regional Organisations in the Pacific (CROP) 'is an ad-hoc committee composed of the heads of… Pacific Island intergovernmental organisations, and permanently chaired by the Forum Secretariat. Its

purpose, according to its charter, is to discuss and coordinate the work-programmes and policies of the different regional agencies to avoid either duplication or gaps in the provision of services to member countries' (CROP, 2007). The CROP member organisations are Fiji School of Medicine, Forum Fisheries Agency, Forum Secretariat, Pacific Islands Development Programme, Secretariat of the Pacific Community, South Pacific Applied Geosciences Commission, South Pacific Board for Educational Assessment, South Pacific Regional Environment Programme, South Pacific Tourism Organisation and USP.

At a meeting of CROP library staff at USP in November 2007, the group decided to form CLAIM and include representatives from PARBICA (Pacific Regional Branch of International Council of Archives).

> The meeting expressed concern at the invisibility of libraries/archives in the Pacific Plan and Digital Strategy and identified the need for greater attention to be given to the information management field, especially the need for human resource development in these sectors. The need for collaboration and harmonisation of policies amongst CROP libraries/archives was also discussed. A working group called CLAIM was formed to initiate dialogue with Forum leaders and donors, and to formulate a regional plan to facilitate further development, implementation and monitoring of the Pacific Plan with regards to information management.[2]

The question is whether this new group, whose aims are somewhat narrower than SCOPAL's, will have more success or whether its efforts will follow a familiar pattern of limited success determined by direct access to funding to support its objectives.

Mechanisms for change – national planning documents

An examination of national planning documents in the region shows a woeful neglect of any but passing references to libraries. This lack of government interest has been a key factor in the poor library development in the region. There is little understanding that good governance depends upon access to quality information. 'Very few

decision-makers and Pacific Island leaders will link good governance and accountability to the efficient management of public sector records' (Williams, 1998: 1). The following are some samples from strategic planning documents.

Fiji (2002) *Rebuilding Confidence for Stability and Growth for a Peaceful, Prosperous Fiji: Strategic Development Plan: 2003–2005*:

> If Fiji is to become the hub of education excellence in the region and become competitive in the global market, improvement in the quality and delivery of education at all levels including higher education and vocational training is essential. A particular focus must be on raising education standards in rural schools to be on a par with urban schools. Education also needs to be aligned to technology developments and future skill demands such as Information Technology. (Fiji, 2002: 12)

There is no reference to libraries in the entire document.

Fiji (2007) *Strategic Development Plan 2007–2011*:

> ICT has the potential not only to create new jobs through call centres and other related activities, but also to empower rural dwellers with information and provide low-cost tele-services in some cases. The adoption of ICT is also the key to improving productivity, especially in the public sector. Government intends to deliver as many online services as possible by 2006 and make greater use of ICT, in order to improve internal processes. (Fiji, 2007: 54)

There is no reference to libraries in the entire document and no conception that libraries could have a role to play in 'empowering rural dwellers with information'.

Fiji's Ministry of Education strategic plan for 2006–2008, *Educating the Child Holistically for a Peaceful and Prosperous Fiji*, is an impressive-looking document with a lot of very specific outcomes, into which the development of libraries and improved training for library staff could fit very easily. But there is no specific mention of libraries in the entire document, except in the organisational structure chart, where Library Services appears with the responsibilities of 'Management of Library Services, Provision of quality library resourcing, Upgrading of libraries, Training' (Fiji Ministry of Education, 2006: 29). Here was an opportunity lost to position school libraries as a central part of strategies to improve basic education. Given that Fiji had a military coup in

December 2006, it is uncertain to what degree the current ministry is implementing this plan.

Another example is the Niue Department of Education (2002) Corporate Plan. Niue has only two schools, one primary and one secondary. There is no reference in the plan to any specific library strategies. However, a budget of NZ$4,000 was allocated in the primary field, and NZ$4,500 for the Niuean budget 2003–2004. This allocation covers 'Informational texts, Narrative texts, Reference texts/posters, Manual computer system, Computer cataloguing system for students/teachers, Repair stationery, Paper stationery, poster/text publishing, Computer Software support information & research skills' (Niue Department of Education, 2003: 28). The allocation, meagre as it may seem, is actually a great deal more than most primary school libraries in Fiji would receive.

Nevertheless, there have recently been a number of positive initiatives within planning documents. The Kiribati Ministry of Education, Youth and Sports *Operational Plan 2005–2006* incorporated strategies to improve school libraries. These included helping non-government schools to establish libraries, staff training, automation of library services and raising public awareness about the use of library services (Kiribati, 2004).

Nauru's Department of Education and Training includes in its *Strategic Plan and Annual Budget 2006–2007* a strategy to ask donors for AU$100,000 for library books, storage and shelving, in line with its objective to 'provide basic learning materials, including library books and blackboards' (Nauru Department of Education and Training, 2006: 2). The strategic budget does not specifically mention library training or staffing. However, PRIDE is working on a number of projects with the Nauru Department of Education and Training, and it is likely that this area will be addressed.

The Samoan Ministry of Education, Sports and Culture has incorporated a significant section on developing school libraries into its 2006–2015 strategic plan. It has a vision of library services as 'responsive to the needs of schools to enhance information literacy and learning for all' (Samoa Ministry of Education, Sports and Culture, 2006: 35). It very specifically identifies problems facing libraries, including lack of trained and qualified librarians due to 'lack of marketing and promotion of librarians as a career; lack of in-service training for librarians causing a poor image of librarians as a career; poor salaries for librarians, and lack of scholarships in library training' (ibid.: 36). The document then makes extensive and specific policy

statements relating to libraries and outlines 17 strategies to achieve its library outcomes. The strategy for in-service training for school library staff is already under way.

A strategy for upgrading libraries in the Solomon Islands is in progress, supported by the European Union. School and provincial libraries are given special attention.

The positive steps towards better school libraries in the region are a direct outcome from the PRIDE Project, which has been working closely to achieve the *Forum Basic Education Action Plan* across the region.

Aid and libraries in the South Pacific

As we can see, aid funds have played an important part in developing libraries and library infrastructure in the region. Many funding agencies have supported the development of libraries in the past 40 years and there have been high numbers of volunteers in libraries in the South Pacific countries. But how effective has this been?

Where aid is given to libraries with appropriate infrastructure and staffing, it is very effective. The development of USP Library, PIC and PIMRIS shows real and long-term benefits. Where aid is given to individual projects, the results are often localised and of limited benefit. The aid given to Suva City Library demonstrates this: the children's library was refurbished, air-conditioned and given a substantial new children's collection by the government of New Zealand. The initial result when the children's library opened in 2005 was most impressive. But Suva City Council has not allocated any budget to Suva City Library (before or since then) and without a budget to develop the children's library further, the collection will become tattered and unattractive and the section will lapse back into its former moribund state.

Aid through government initiatives fares no better when appropriate infrastructure is not considered. In 2003 AusAID provided AU$1 million for books for rural primary schools in Fiji and an experienced Australian school librarian was brought in as a volunteer to select books and, with LSF staff (most of whom had no library training themselves), train library staff in these schools. However, the library staff at most of these schools remain untrained, nor are there programmes to show teachers how to use books in the classroom and incorporate information literacy into the curriculum. After three years, one wonders if the books are still in the schools and what use is being made of them. The benefits of this

project seem short term only. Far too often, aid to libraries is not made dependent upon proper infrastructure and staffing.

Cyclones, coups and corruption

The physical world can have a huge impact upon library development. Libraries can be destroyed by cyclones and floods in a few hours. USP Library lost its roof when Cyclones Eric and Nigel hit within days of each other in 1985, and books were extensively damaged. However, with the university's support the library recovered relatively easily from this setback. But when a flood rampaged through Nadi Town Council Library in 1999 it lost virtually everything – books, furniture and library fitments were all destroyed or damaged beyond repair. Like many municipal libraries, Nadi Town Library received little budget and so had to rely entirely on donations to start afresh.

With global warming come rising seas. Many of the smaller island countries of the South Pacific will be affected – some, such as Kiribati, Tuvalu and the Marshall Islands, may 'sink' beneath the rising waters within the next 30 years, their peoples migrating elsewhere. In such circumstances, one wonders how much incentive there is to develop libraries in these countries.

Political unrest in the South Pacific has reared its ugly head in the last 20 years or so. Fiji has experienced four coups since 1987, and the Solomon Islands have been devastated by an extensive period of civil unrest since 1998. Vanuatu, Tonga and Samoa have all experienced periods of civil unrest. The reasons for this are many and various, but major causes relate to the growth of nationalism, competing ethnicities, unresolved post-colonial tensions, rampant corruption and tensions rising out of democratic values and systems that are apparently at odds with traditional and cultural systems. The economic impact of this unrest is devastating. Libraries, which do not have a high profile, are marginalised further in the competition for available funds, and experienced library staff migrate to seek safer and more lucrative pastures. It is hard to estimate to what degree libraries in the region have been affected by political unrest and corruption.

In some cases the impact on libraries is very clear. In 2000 the FLA made an extensive submission on school libraries to the Education Commission (Jones et al., 2000). Many of its recommendations were incorporated into the commission's own recommendations and it

seemed as if there was a real opportunity for school libraries to be upgraded and developed appropriately. But the civil 'coup' of George Speight and company took place in May 2000, and an interim government was followed by an elected government that largely ignored the commission's extensive recommendations. So there was an opportunity lost to implement a lot of strategies to improve school libraries in Fiji.

Solutions to library development

How can libraries in the Pacific be turned around so that they are vital information centres that will enhance lifelong learning and boost literacy and information literacy? It is clear that a number of factors contribute to the poor state of libraries throughout the region. These include:

- lack of understanding on the part of decision-makers as to what a library is and can be;
- unwillingness of governments and parent bodies to spend adequate funds on libraries;
- lack of leadership at the national level;
- lack of qualified librarians in key areas;
- lack of trained and qualified library staff;
- over-reliance on aid and donors;
- lack of continuity in regional initiatives to improve libraries.

When we look at the success stories, such as USP Library, it is clear that it is successful because the university has addressed the issues above.

Ideally, the region needs another SCOPAL, but adequately funded with a secretariat. Funding agencies are reluctant to support such bodies in perpetuity, so the region needs to look at an agency such as the Pacific Islands Forum to propose and support this. PRIDE has demonstrated what can be achieved with one person who is funded to negotiate with, lobby and convince stakeholders of the benefits of libraries. Without such a stable support mechanism in place, it is likely that the current crop of initiatives will lapse after a few years, and libraries will revert to being underfunded, with pathetic and out-of-date collections, providing little by way of services and largely irrelevant to the informational needs of their communities.

Notes

1. A. Naupa, personal communication, 1 November 2007.
2. S.J. Yee, personal communication, 20 November 2007.

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7

Staying alive in a political world: the case of libraries and information centres in Nigeria

Zakari Mohammed and Victoria Okojie

Introduction

Politics is an innate tendency in all living beings, particularly in the animal kingdom but most especially in the human race. This tendency helps to guide individuals in strategising ways and manners to fit, survive and advance in the changing world within and outside their immediate and remote environments, either as leaders or followers. In essence, all humans are political animals, or rather politicians, whether in an active or an inactive capacity. Thus, by extension, all humans belong to the political class in their positions and capacities, whether involved actively in politics (as occupation or vocation), holding political positions, working in government or private establishments or institutions, establishing or running private outfits of any sort, engaging in any sort of self-sustained endeavours, including labouring, or participating directly or indirectly (as common citizens or followers) in political dynamics and arrangements for the existence, survival, sustenance and advancement of a family, society, community, state or nation.

The bottom line lies in the fact that every member of a family, society, community, state or nation, especially in the contemporary democratic setting, has a right to take a decision as to whether to vote and/or be voted for in any politically inclined dispensation irrespective of its type, level, location, time, period or duration. In effect, such a member has a role to play directly and/or indirectly at one point or another in the general affairs of the environment to which s/he belongs to ensure its corporate existence, survival, development and advancement. Hence one

may not need to belong to a political party, association or any form of politically inclined arrangement to be considered a politician, as some elements of politics have to be displayed in one form or the other, directly or indirectly, for one to be relevant, exist, survive, develop and advance in any environment and circumstance. In other words, our actions and inactions to ensure peace, stability, progress and advancement of any environment, society, community or ourselves in any circumstance can be said to be political. The political class could be said to comprise the active politicians, the white- and blue-collar jobbers, the aristocrats and the other citizenry irrespective of their socio-cultural, economic or political inclinations.

The library and the political class

Legislators and all categories of politicians in the contemporary world are by their nature and characteristics information-dependent. They require information from any source provided it will assist them in the performance of their political activities and legislative functions. Sources of information needed by legislators, politicians and indeed policy-makers cover all forms and types of print, non-print and electronic media to political and non-politically inclined meetings, rallies, campaigns, festivals, conferences, seminars, workshops, retreats, other policy-making forums and most especially the public and legislative libraries and information centres.

Ideally, libraries and information centres are supposed to serve as essential public goods or institutions that should provide all the information necessary to contribute to the achievement of government policies and objectives; promote education, knowledge, skill and learning; promote social inclusion and leisure; promote democratic society, ideals and practices; and promote freedom of access to information for the enhancement of socio-cultural and political struggle and freedom. They are also to serve as an avenue for the acquisition of the knowledge, skills and experiences necessary for the socio-political, cultural and economic advancement of a people and a society.

By and large, the public and legislative libraries and indeed other types of libraries and information centres are established to serve as veritable sources of old and current information. They are institutions for the acquisition, processing and dissemination of information on government activities, policies and plans, government reports, Bills, Acts, budget

speeches and proposals, legislative proceedings and other relevant reference materials useful in the performance of politicians, legislators, government officials, researchers and the interested public in their day-to-day activities. They give individuals opportunities for self-development and empowerment.

To some extent, over the years there has been a marriage of convenience and a symbiotic relationship between libraries and information centres on the one hand and the political class and government on the other. This led to the emergence of public or government-owned libraries and information centres, based on the premise that the former can serve as the latter's mouthpiece in the education and enlightenment of the public. A majority of them were set up to satisfy some of the government's plans as well as its political objectives and goals, aimed at having a better control of the governed. For example, in the British colonies of West Africa, including Nigeria, a number of reading rooms were established by the colonial governments to serve as a propaganda avenue where the citizenry were informed of the goings on in the political arena and on the war frontiers. In line with these objectives, their collections were mostly newspapers, magazines and other ephemera, while the types of services provided were geared towards meeting these basic needs.

The nature and characteristics of the libraries in colonial British West Africa were similar to those of Eastern Africa. According to Ikoja-Odongo (2003: 3), the first public library in Entebbe, Uganda, was established in 1923 to provide reading services for expatriates. These libraries were conceptualised bearing in mind that the population in the colonies was largely illiterate and could hardly read or write in the English language. It was not until June 1959, when the Chancellor of the Duchy of Lancaster introduced in the House of Commons a five-point programme aimed at increased export of British books to its colonies, that the British government, through the British Council, assisted in the development of library systems in a number of its colonies (Were, 1994). These newly developed public library systems in Nigeria, and indeed in Africa, were relatively functional, efficient and effective. The new class of élite that emerged after independence depended heavily on the libraries for their information needs: educational, socio-political, etc. Regional governments and institutions voted adequate funds for the libraries to perform their duties. The status of the librarian in society was so high that the university librarian of the University of Ibadan (the first university in Nigeria) acted for the vice-chancellor whenever the vice-chancellor was away. Head librarians in other organisations and institutions were members of the management team and often the

'think-tank' whose views were not only sought but also valued. This is no longer the case, as the university librarian's status has been diminished to that of a principal officer of the university and the deputy vice-chancellor now acts when the vice-chancellor is away.

Similarly, the libraries and information centres in Eastern Europe, which experienced decades of communist administration, were conceived more as propaganda machines. Politically, they are seen to have existed to limit and control public access to information and also to channel readers' intellectual curiosities and needs (Kuzmin, 1993). This led to an erosion of trust in the accuracy and value of information they provided, as it created the belief that information was available only to the élites. Only officially sanctioned information materials (mostly propaganda) were made available to the general public.

In contrast, libraries in the USA, particularly the public library system, were established on the premise that access to information should be free and open to all. They were expected to take a democratic stance towards the people they served and the information resources and services they provided. All points of view on a given topic were to be provided to guarantee freedom of expression and freedom of access to information as a reflection of all the principles of library philosophy (Pinhey, 2003: 2).

From the foregoing, it could be said that there has been a mutual relationship between the emergence, existence and survival of libraries and information centres and the political class and government. Libraries thus enjoyed various forms of patronage from the government of the day as well as from the political class (élites) who were the main consumers of their products and services.

The turning point between the library and the political class

Unfortunately, however, the marriage of convenience between the library and the political class did not last long after the independence of a majority of the colonies in Africa, nor in Eastern Europe after the collapse of the communist empire in the early 1990s. There have been changes in the conception of political needs, government priorities, the nature and characteristics of the political class, particularly the élites, and the socio-cultural, political and economic milieux of contemporary society. This is despite the fact that libraries and information centres have by and large assisted the governments of the moment and the élites

to achieve their political ambitions, especially in the areas of informing the electorates and the citizenry, helping them in taking or making informed decisions about government, participating in democratic processes and educating themselves for personal and occupational advancement and fulfilment. This was possible through the provision of community information and referral services, reading and meeting areas, including exhibitions, and a variety of information resources.

The library and information service for the political class and the general public in Nigeria, especially in contemporary times, is at a crossroads due to a variety of challenges. These include the changing characteristics of the customers; lack of adequate patronage and support by the government, especially in the area of funding; the availability of other competing sources of information services provision and delivery, such as the internet; and the impact of information and communication technologies on information system access and utilisation.

In developing economies like Nigeria there seems to be a shift in the understanding of the concept of politics, especially by politicians and the general public. In political parlance, a politician could once have been perceived as one engaged in partisan politics as a profession, for political gain or appointment, or for achieving partisan goals or objectives such as making oneself available to provide service to the public. Today, politics is seen as a quick way to self-enrichment and self-aggrandisement. The concept of service to the public has been relegated to the background. The basic thrust of the desire for office has shifted to desire for wealth, grandeur and the associated prestige. According to Nwabueze (1994: 86), to be in politics in Nigeria or even merely to hold a public political office and not enrich oneself by it through corruption is seen as a mark of naivety, if not idiocy, and earns for the person concerned derision and mockery from his friends and clansmen. He added that the dilemma of such a person is even worse because his claim to innocence is not believed by the public anyway. These and many more other embarrassing misconceptions of the ideas of politics and service to the public, especially by the political class of the day and indeed by the public, presuppose a consequent shift of paradigm in the mutual marriage between the political class and the library, with the latter at the receiving end. What we have today is a sizeable number of money-bag politicians and nonchalant government policy-makers whose interest in information access and utilisation, especially using conventional sources such as the library, leaves much to be desired.

It is a basic fact that a majority of libraries and information centres in the developing world have been in serious financial crisis for decades,

especially during periods of military rule. There have been consistent cuts in their annual budgets, leaving them with barely enough for salaries and wages and with little or nothing to purchase even newspapers or undertake minor repairs and restorations. The low priority accorded them has turned libraries into 'ghosts' of themselves. Burlingame (1993) observed that it has become necessary for libraries to seek alternative sources of revenue to support their activities due to rapid growth of information, increased costs for services and materials and demands for additional services. This implies that librarians need to spend more time and energy networking and writing grant proposals in order to provide the required services. The picture in Nigeria is no different, as the country has experienced a long period under military rule since independence.

The most financially hit libraries in Nigeria are the public and school libraries, whose collections are more like archives. In a survey commissioned by the World Bank on the use and availability of textbooks in 160 primary and secondary schools in eight states in Nigeria, Segun and Okojie (2005: 35) noted that even though about 60 per cent of schools had spaces designated as libraries (relics of the glorious past!), most of these 'libraries' were poorly equipped and had very old, outdated and unattractive materials, and as such could hardly pass for a contemporary library. Indeed, many libraries had been converted to stores which simply housed books and other resources that were not often used. The survey revealed that fewer than 5 per cent of the schools claimed to have 'functional' libraries. However, it was observed that such libraries were usually stocked with recommended textbooks and students used them as mere reading rooms! A critical analysis of this library sector shows that school libraries in the true sense of the words are basically non-existent in public schools in Nigeria.

The public libraries have not fared much better. Fewer than 10 per cent have internet access (sourced through donations), and most of the new book stocks were donated by international agencies. The academic libraries have not been spared, either. A majority of them could simply be referred to as archives. There has been a negative correlation between the products and services they provide and the demands for them. This has resulted in the rapid negation of their products and services in favour of the internet as an alternative rather than a complementary source of information. Fortunately, recent interventions by the Education Trust Fund (ETF) have saved the libraries in Nigeria from total collapse. Donor agencies such as the World Bank, the Carnegie Corporation, Book Aid International (BAI), the MacArthur Foundation and the Library Development Funds (LDF) arrangement by the National Universities

Commission (NUC) have continued to serve as face-saving devices for the degenerating academic and public libraries. It is also important to place on record the interventions made by the private sector. Financial institutions such as First Bank (Nig.), the United Bank for Africa (UBA) and Intercontinental Bank and communication firms such as Globacom and MTN Nigeria Communications have provided some of the information and communications technologies and electronic library needs of some of the educational institutions in Nigeria.

The legislative libraries and information centres in Nigeria are more like glorified book warehouses, as they are rarely utilised by the legislators, whose levels of educational background, socio-political and economic thought and preoccupations are generally in conflict with the essence of establishing these libraries. There is no doubting the fact that the legislators are busy people engaged in all sorts of legislative duties, functions, processes and other political activities within and outside their chambers and constituencies. They need every bit of information identified as relevant to the success of their legislative and political endeavours in their hands and at their fingertips irrespective of their locations (Mohammed, 2007: 4). Ironically, this supposition and observation cannot be said to be applicable, in the practical sense, to a majority of Nigerian legislators when their levels of library patronage are x-rayed. Most are rarely seen doing any reading, searches or consultations in the legislative libraries or anywhere else. Perhaps this explains the actions and inaction of some of them at legislative sessions, as well as their reactions to some serious national and international issues begging for their attention, intervention and contributions.

Consequent upon the foregoing anomalies, particularly in the area of funding and provision of enabling facilities and environment, libraries and information centres are not in good standing to cope with the challenges posed by the changing needs of their clientele. This has been translated into their inability and lack of capacity to acquire and maintain state-of-the-art ICT facilities and infrastructure; connect and maintain 24-hour internet connectivity and service provision; acquire and update e-collections; acquire, process and update printed and non-printed information resources; hire and retain qualified and experienced staff, especially in the areas of ICT applications and operations (hardware and software); acquire and maintain contemporary library furniture and furnishings; provide and sustain ICT-based library and information services; and cope with the increasing demand for a variety of contemporary library and information services where time and customer location are inconsequential.

The sorry state of libraries is evident in other emerging democracies, such as Croatia, where a majority of civil servants see public libraries as mere tools for promoting literacy and thus their collections need to include valuable books other than popular reading materials (Horvat, 2003: 3). Describing the state of libraries in South Africa, Qwelane (2000: 2–4) observed that the library services are deteriorating, the economic fundamentals of the country have impacted negatively on libraries and what is available in the libraries is a portrait of librarians of yesteryear. He advocated the need to turn the fortunes of libraries to the better through the adoption of the Latin saying *Gloria est consequen da*, meaning glory must be sought for.

Staying alive

There is no doubting the fact that library and information services provision is necessary in both developed and developing economies, in all spheres of human endeavour. This is even more crucial in developing economies like Nigeria where there is a continued influx of library users, especially from the educational and research institutions seeking information or services from dilapidated libraries that do not even have internet connectivity as an alternative or complementary source of information for coping with their increasing and varied demands. The public libraries do not meet client needs either, as they are even worse hit due to near total relegation by the authorities, such that the demands for their materials, services and study spaces are near crisis proportions, particularly in the cities and urban centres. Another challenging dimension for the provision of enhanced library and information services is the need to cater for the teeming illiterates, semi-literates, school dropouts, job-seekers and other categories of people engaged in the productive and non-productive sectors of the economy resident or hanging around in the urban, semi-urban and rural areas.

The future of libraries and information centres in the current democratic setting should not be mortgaged or undermined in societies and nations like Nigeria, ridden with socio-economic and political inequalities such as illiteracy, poverty, hunger and disease. These conditions make it imperative for libraries to become more politically aware in order to fulfil their set objectives. Indeed, there is a window of opportunity, with the new democratic dispensation, for libraries to redefine their role to provide services that transcend the traditional library

provision, such as social and community service referrals, information about community organisations, exhibition space and meeting areas for individuals and groups, internet access, adult literacy programmes, tax forms and volunteer tax advisers, voter registration forms and so on. Pinhey (2003) noted that the transition from military rule (a totalitarian state) to a genuine democracy is an enormous struggle in many ways. Overwhelming economic, social, political, cultural, emotional and mental hurdles challenges the citizens and governments of emerging democracies. She further noted that libraries are an essential component of the global resurgence of democracy, which has been under way since the 1960s. They have helped citizens to participate fully and effectively in their democracy and make informed choices about their government, as well as providing them with appropriate resources to educate themselves for personal and occupational success and fulfilment. At a time when libraries must stretch their scarce financial resources to meet basic needs and compete with other sectors, a library's cost-benefit analysis is high priority. What is therefore necessary is to develop strategies for turning around library and information services provision so that it can impact positively on all sectors of the economy. Libraries can influence the organisational politics of their operating environments using various strategies, including but not limited to the following.

Advocacy

Library and information professionals, possibly under the umbrella of their professional associations, should reassess their performance at various levels over the years from practical perspectives, with a view to evolving better strategies for lobbying the authorities on the need to empower libraries to ensure better service delivery. Advocacy on topical issues is a powerful tool that can be used positively to facilitate the development of libraries. Advocacy has been successfully used in other sectors, including service-oriented sectors, and librarians must employ this skill and use it in a businesslike manner. Over time, librarians have focused mostly on talking to themselves rather than to the people they serve. To their detriment, librarians have not learnt to 'blow their own trumpets' loud and clear. This must change if libraries are to stay alive in a political world where there are many competing basic needs and interests.

The Nigerian Library Association, established in 1962, has successfully used advocacy to facilitate the establishment of the National Library of Nigeria and the National Library Act of 1962. Also, the

association was instrumental in securing government support for the professional education and training of library personnel, leading to the establishment of the Institute of Librarianship (now the Department of Library, Archival and Information Science) at the University of Ibadan. In 1995 the association successfully lobbied the government to establish the Librarians' Registration Council of Nigeria (LRCN), which has responsibility for regulating the practice of the library and information profession in Nigeria. In recent times, when the anomaly of appointing non-librarians as directors of state public libraries is becoming commonplace, the association has focused more on advocating that only professional librarians should be appointed directors of libraries. The Oyo State Library Board has effectively used intense lobbying to get the government to set up its ICT centre; raise the status of the director of the state library services to that of a state librarian (equivalent to a director-general), thereby creating vacancies for five additional library directors; and gain the passage of an Act obliging all local government areas in the state to establish zonal public libraries.

Partnerships

There is urgent need for collaboration among ICT professionals, mass-communication professionals, library and information service professionals, publishers, authors, parents, teachers, guilds of editors, friends of libraries and other stakeholders to constitute a united front for the emancipation of library and information centres and other types of information services delivery institutions so that they can be removed from the list of endangered species of relegated public institutions. Libraries in partnership with these stakeholders have been in the forefront of reading promotion in Nigeria. Several book fairs (at national, regional and state levels) have been held, as well as other activities such as school quizzes and debates, exhibitions, readings by authors, career talks and so on. Although attempts have been made to meet and hold discussions among the stakeholders from time to time, there is a need for a more coordinated and consistent approach to tackling the challenges in the book industry.

Public-private partnership initiatives

There is need to explore holistically the engagement of libraries and information centres in public-private partnership (PPP) initiatives, especially

with finance institutions, communication firms, community groups and other well-meaning individuals of high integrity, with a view to influencing them to invest in funding and management of library and information services on mutually beneficial terms. A few such initiatives have resulted in setting up internet facilities in three universities; the MTN Schools Connect project in collaboration with Schoolnet Africa has also linked up a few schools, while a few public libraries have been equipped with modern ICT facilities by some good-spirited individuals. Although a few other similar initiatives appear in libraries in the nooks and crannies of Nigeria, there is a need for a more coordinated approach that would lead to concrete benefits, especially in rural areas and among disadvantaged groups such as the physically challenged, women, youth and children.

Fundraising and grant seeking

Librarians need urgently to improve their skills in proposal writing in order to attract grants and funding for the activities and resources they need to perform optimally. The concept of developing, packaging and managing different aspects of the library service as mini-projects within the library system as a means of stretching the limited resources available has not been fully exploited. There has been very little access to the pool of grants available from national and international organisations. In recent times there have been more conscious efforts to seek grants by the Nigerian Library Association, the National Library of Nigeria and other libraries. Many university libraries have successfully sought grants and support from the Carnegie Corporation, MacArthur Foundation, eIFL.net, Journal Donation Project and so on.

Resource sharing and inter-library cooperation

Resource sharing, cooperation and collaboration among library and information services providers need to be encouraged. The importance of this cannot be overemphasised, especially in this period of global economic recession and with the world becoming a global village. Libraries must be encouraged to form consortia along the lines of their specific interest groups so as to derive the benefits that usually accrue from such networks. University, polytechnic and college of education libraries in Nigeria are at various stages of setting up consortia. Six university libraries supported by the MacArthur Foundation are putting finishing touches to evolving strategies for sharing electronic resources. The National Universities

Commission is currently subscribing to electronic databases at cheaper rates for university libraries in Nigeria. Also, the new Millennium Development Goals office set up by the federal government is exploring ways to facilitate resource sharing among college of education libraries by using electronic thesis and dissertation systems (ETDSs) as a critical first step.

Use of ICTs

Another strategy that should be employed by libraries to stay alive is the exploitation of ICT capabilities and potentials for the provision of state-of-the-art library and information services that can cope with the increasing and varied needs of existing and potential users. Most librarians still have only a rudimentary knowledge of using the internet and other ICTs, and as such have not been able to demonstrate convincingly the benefits of these tools to their clients. The result is that potential users are increasingly turning away from libraries to other sources, like cybercafés, for their information needs. This is a worrying trend that must be stemmed because of the inherent danger of other professionals taking over the traditional role for which librarians are known: the provision of information. The current trend of creating virtual libraries in Nigeria needs to be encouraged. The NUC, with the support of the ETF, developed a virtual library for Nigerian universities. Many other organisations, government ministries and institutions are at various stages of developing virtual libraries. What remains to be done is to develop a strategic approach to this endeavour, and perhaps have one central coordinating body – the National Library of Nigeria.

Staffing

This is a major challenge that must be overcome if libraries are to stay alive. Hiring, training, retraining, continuing education and motivation of qualified staff, especially in the areas of ICT, finance, fundraising, strategic planning and management, will ensure the provision and sustenance of enhanced services that will win the confidence and sympathy of both the clientele and the authorities. Library managers should do a staff skills audit with a view to building their capacity, thereby enhancing their ability to provide more efficient and effective services.

Also, there is an urgent need for non-professionals (staff with no library education) to be flushed out of the system. For a long time, the library profession in Nigeria was an all-comers job that often saw unproductive

and difficult staff been transferred to the library in some organisations as a disciplinary measure. The effect of this can only be imagined. However, as soon as the LRCN overcomes its teething problems, a proper mechanism for regulating the practice of librarianship in Nigeria will be put in place and the high-quality standards that obtain in other professions will be achieved. The LRCN has the basic functions of determining who is a librarian and the level of skills and knowledge required, accrediting library science programmes, keeping a register of librarians and maintaining discipline within the profession.

Services

The services provided by libraries need to become more relevant to the needs of their clientele. Librarians must be more proactive and creative in reaching out to their users. For instance, mobile library services using cheap modes of transport such as motorcycles or tricycles can be used to provide information to rural areas. In a survey carried out by Smith and Usherwood (2004: 3), they noted that respondents saw the public library in Australia as an essential public good, underpinning education, promoting social inclusion and a vital part of a democratic society that should promote freedom of information. Specific services could also be targeted at disadvantaged groups, while mailshots, selective dissemination of information, current awareness services and so on can be used effectively to satisfy the information needs of users. For example, the Kano State Library Board outreach service for women in purdah who otherwise do not have access to libraries attracted the attention of government, which consequently provided additional funds to the library. The 'American Corner' established by the American embassy in Bauchi has been able to attract government funding through its skills acquisition programme and other innovative services for women. The Oyo State Library Board has been able to attract government patronage and funding through its services to disadvantaged groups such as the blind.

The issue of charging for library services is an ongoing debate which has not been fully accepted by the library clientele (ibid.). There is no doubt that libraries need to reposition themselves as information 'hot spots', the preferred place that everybody turns to when searching for information. It is important to note that information literacy activities should be stepped up and done on a consistent basis for all categories of library users in order to make the libraries truly centres for lifelong learning, as stated in the Millennium Development Goals.

Library school curriculum

There is the need to review the curriculum of the library schools to ensure that the skills and competencies taught are adequate for the products to function effectively after school. Many library schools still do not have well-equipped computer laboratories and do not teach courses on advocacy or internet search strategies. There are plans by the Nigerian Library Association and the LRCN to work with library science educators to overcome this challenge.

Content development and research

There is a need for engagement in research and database construction and management to serve as a foundation for decision-making, planning and involvement in other viable activities that would facilitate the achievement of the goals and aspirations of libraries and information centres. Nigeria is well known for its relatively low provision of relevant data in any sector. The libraries can play a key role in this to support policy-makers and thereby become more relevant to society. Libraries in Nigeria have an opportunity to carve a niche for themselves and become more relevant in the global scheme of information provision by creating and uploading local content on the internet and in other electronic formats. A strategic approach to doing this must be developed urgently, and libraries must take the lead in the initiative to showcase indigenous knowledge (IK).

Library and information policy

It is important have a national library and information policy which would provide the framework for libraries in the country to operate. The development of a draft policy should be considered by the professional association. Also, individual libraries in Nigeria need to return to the good practice of developing realistic strategic plans to avoid a haphazard approach to providing services.

Professional association

The Nigerian Library Association should become more politically aware in order to play its role as a reliable defender of the ethos of the profession. It must take the lead and partner with other stakeholders to reposition the librarianship profession to make it more relevant in the

emerging global electronic village. It must redefine the role of librarians in line with the reality of new ICT interventions in library operations. To achieve these aims, the association needs to provide continuing education, capacity-building and staff exchange programmes to develop the skills of librarians and help them compete favourably for the dwindling resources available to governments. There is a lot to do, and it is hoped that all of these plans will be realised.

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8

Libraries and politics – Danish reflections and examples

Winnie Vitzansky

Introduction

In my world, libraries and politics are inseparable – this is no surprise given my position in the Danish Library Association. I work in a political environment, and adding to my sense of constantly being involved in all sorts of political issues is the fact that the Danish Library Association is mainly representing public libraries in Denmark. In this chapter I will therefore reflect on the issue of libraries and politics from the perspective of a public library association as well as from my Danish perspective.

Our political environment

Libraries have always been a political project. Libraries have played a vital role in our society as disseminators of information, knowledge and culture to everybody – irrespective of their social conditions, religion or political beliefs. That is the reason why the decision-makers are the politicians in democratic societies who grant libraries money to run their services – to state the obvious. When the public libraries developed as rapidly as they did in Denmark in the late nineteenth and early twentieth centuries, it was because they had an important role to play in the development of our democracy as well as the development of an industrial society that needed skilled labour. The libraries were instrumental in this political and economic project, and in Denmark the library pioneers worked closely with other adult education initiatives. The library pioneers were all strong believers in a 'library spirit', and

they formed associations of various kinds to establish and run libraries. One of the results of this work was the creation of the Danish Library Association in 1905. But in the early twentieth century a 'public service' perspective came into the library system in Denmark, as the first county libraries were established and the first Library Act was passed in Parliament in 1920. This development was only possible because the library pioneers formed alliances with supporters of the library spirit among leading members of society and politicians. In other words, they lobbied for libraries.

Do today's library associations need to be politically aware?

In this sense we work under the same conditions as the pioneers. We too need to form alliances with politicians and related organisations in order to further the cause of libraries. We still need political support for libraries, and that means we need to develop strategies to gain access to the politicians to convince them about the continued relevance of libraries in a modern society.

In the twenty-first century libraries are still a political project, with the overall goal of giving all people free and equal access to information and culture. In a democratic society it is necessary that the citizens have this access – independent of political and religious beliefs.

But the way in which we are securing this fundamental right is changing. Even though libraries still play a vital role in the global information and knowledge society, this role is in transition. We are no longer information poor. On the contrary, we are overwhelmed by information in Denmark as in many other countries: books and other materials are no longer a scarce resource, reserved for the wealthy and intellectuals. Almost anybody can afford to buy what they need – if they want to. Therefore we are redefining the library, and all over the world we are busy doing so.

Library professionals need to understand this reality and implement the necessary changes. A quite different thing is to make the political decision-makers understand, promote and finance these changes. My experience is that it is way easier to convince politicians of the need for books than it is to convince them of the need for internet services, development projects and contracting of database licenses. And to explain why we need it all – books, music, films as well as the digital resources – is a challenge which

requires the library association to have good lobbying skills and good relations with national and local politicians! And we need a very different set of arguments when we lobby for libraries today than we did just few years ago.

We also need to do our advocacy work in a very different way. For instance, we have to be much more outgoing and visible, because the modern library is not a matter of cause. In my Danish environment I find that we are better at convincing ourselves of the importance of libraries than we are at convincing the outside world about the same thing! We tend to blame the politicians for always forgetting us. It is true that it often happens that libraries are forgotten, for instance in national strategies, but my point is that it is our responsibility to ensure that they don't forget us! If we want to achieve public recognition, and consequently the necessary financial support to run updated and qualified libraries, we must also work politically.

To gain broader understanding it is necessary to make your cause understood and accepted by the decision-makers and the public. In order to get your fair share of the cake you must be able to convince the politicians that your cause is at least as important as all the other good causes.

Therefore library associations as well as all other professional groupings need to be outgoing and aware of the political mechanisms. But in addition, the library associations must see themselves as lobby organisations and learn how to work as professional lobbyists – at the national level and at the international level.

Bringing the libraries into the political agenda

In the Danish Library Association we represent one of the more radical solutions to achieving this political approach to working for libraries: we have brought the political decision-makers and the librarians together in the same association! The Danish Library Association has a long history of cooperation between librarians and politicians. One of the likely reasons for this tradition is that Denmark, as previously mentioned, got its first Library Act in 1920. When you have library legislation, which needs regular revision, the professionals have to establish contacts in the political system. As the Danish public libraries gradually moved from state grants to local municipality grants, links to local politicians became a necessity.

This is reflected in the structure of the Danish Library Association, where the president since 1962 has been an active politician and from the late 1970s a local politician. Does this mean that the librarians have no role to play in the association? On the contrary, it means that a very close cooperation has developed between the local cultural politicians and their library managers through their joint work in the Library Association on the same cause: the development of the Danish library system.

However, it requires a quite complicated organisational structure of the Library Association to ensure that both groups have a say. Consequently the Danish Library Association is made up of two sections: one for the politicians, the other for the library professionals. What follows is a rather simplified outline of our structure, but I hope it gives you an idea of how political we are!

The council of the association consists of 39 politicians and 19 library professionals. The president is always a politician and so is the first vice-president. The second vice-president is a library professional. To be eligible as a politician you must be an elected member of the committee in your municipality responsible for the public libraries. Underlying this system is an election procedure which secures the political balance in the council. The goal is that the political section of the council of the Danish Library Association should be a correct reflection of the political balance in the local municipalities, which are members of our association. This is also the reason for having both a political president and a political vice-president. If the president belongs to one side of the political spectrum, the vice-president should represent the other side.

This carefully composed balance gives the Danish Library Association a very high degree of political legitimacy, which is one of our strengths in the political world. The possible weakness is that we cannot be as radical in our views as the library professionals would sometimes like. But the main point is that it is very difficult for a minister of culture, for example, to ignore our views on public library policy matters. The minister knows that our positions reflect both the views of the local politicians, who are responsible for the local public libraries, and those of the library professionals, who are responsible for carrying out the policies.

Cooperation between the libraries and their politicians takes place at several levels, starting in our regional associations (we have five regions, following the Danish county structure), and continuing in the board, the council and the many committees of our associations. The most important forum for cooperation is our annual meeting. It is a unique opportunity for the politicians and their library professionals to get to know each other,

and through the political and professional dialogue at the meetings both parties get a much better and more nuanced understanding of each other's needs and necessities. This opportunity cannot be overestimated. A lot of dedicated culture politicians are born at our annual meeting!

Lobbying for libraries – a Danish perspective

I will give you a few examples of how our association works in practice.

Denmark got a new Library Act in 2000. It has been called the best Library Act in the world, creating the legal framework for the new hybrid library by, for example, securing that all public libraries provide free internet access. Leading up to the legislative work was a fierce debate on user pays versus free access to the services of public libraries. In the Library Association the same debate was reflected at board and council meetings, ending up in a clear position defending free access to library services as a fundamental right in a democratic society.

We presented this view to the Minister of Culture of that time and she agreed its importance; but probably more decisive was that she assessed that when the Library Association agreed – and it represented parties from the political left to right – the principle was likely to hold up in Parliament. So she fought for it and she won. (Whether we will also win next time the Act is revised is a very open question, as voices in our association have started questioning the principle, so we will see.)

And when the European library associations under the leadership of the European Bureau of Library, Information and Documentation Associations (EBLIDA) lobbied for improving the European Copyright Directive, politicians from our board contacted their party colleagues in the European Parliament to convince them to vote for the views of the libraries. It was very effective.

Library strategies

Today one of our main focuses is on the need for library strategies. A library system that is also going to cater to the future demands of society requires a balance between local initiatives and national direction and support. In order to strike that balance in times of change we need national strategies and national legislation. Otherwise we will get very

uneven development in local libraries, and the required central initiatives will not necessarily be taken.

We especially need strategies for managing change, and that is why for example the United Nations (UN) initiated the World Summit on the Information Society (WSIS) in 2003 and very clearly recommended that all nations make strategies for the development of the information society – or in other words national knowledge strategies. The knowledge society is a reality, as is global competition, so we have to find strategies to cope with this new world. Seen from a library perspective it is imperative that libraries achieve a central position in a national knowledge strategy in order to avoid the threatening library by-pass, which may easily become a reality. We need politically binding strategies, emphasising the need for a holistic approach where we see libraries in connection with education and research.

But in order to make the knowledge strategy instrumental I think we need two additional tools: a national library strategy – defining the vision and the direction for the library system; and local library strategies – interpreting the national visions into the local environment and local needs.

National library strategy

Together with national library legislation, a national library strategy is an important tool in defining the direction of the complete library system. In Denmark we got a national library strategy in 2006. It came into being through the initiative of the Danish National Library Agency, which is part of the Danish Ministry of Culture, and it is approved by the Minister of Culture. Seen from the point of view of the Danish Library Association, however, it has an important weakness: it has not been adopted by the Danish Parliament. To be instrumental as the guide to national library development, national political approval is imperative. Therefore the Danish Library Association has a double approach to this strategy: on the one hand we pragmatically support using it as the basis for local library strategies; on the other hand we try to make those parliamentarians involved in cultural issues in Parliament further the political debate on this issue. This will hopefully lead to a politically adopted strategic plan for Danish libraries, supplementing our Library Act.

Local strategies

Over the past two years one of our main goals has been to motivate local politicians and library directors to prepare strategic plans for library

development in their local communities. The reason for this recommendation is that, with effect from January 2007, Denmark has implemented a comprehensive reform of our municipal structure, reducing 271 local municipalities to 98. The Danish Library Association has been supportive of the reform from a library perspective because of the improved ability of larger library systems to cope with the challenges of the complex modern library service. But we have been worried that the economic consequences of the reform might leave the libraries with less money and less political attention, because of the more demanding voices for childcare, services for the elderly, schools etc. Our response to this situation is the request for local library strategies. Unfortunately our worries have proved to be justified. Public library funding was on average cut by 5 per cent in 2007, and only a very few of the municipalities had made library strategic plans.

Therefore the Library Association plans to visit all municipalities during 2007 to encourage them to prepare strategic plans. A very important point in our 'tour' is that we always come in pairs: a politician and a professional together. And likewise we ask the municipality to be represented at the visits by the chief librarian, the administrative director in charge of culture in the municipality and, not least, by the political head of culture. So far (April 2007) this has worked out in all the municipalities we have visited. And almost all of those visited up to now have included library strategic work in their planning for next year. This is of course only one example of how we constantly try to bring libraries into the political agenda. Next year we will know more about the effects, when we know the budgets of all Danish public libraries in 2008. We cross our fingers.

Partnerships

I also want to draw your attention to some of the other tools we may use in gaining influence and becoming more visible. I am thinking of partnering: with related organisations, with influential persons in society, with the business sector, etc.

Obviously we need to link our library strategies with the educational and research strategies of our society. Although it is obvious, we have not yet succeeded in getting a Danish strategy for the knowledge society, covering culture, education and research – but we are working on it!

Partnerships with museums and archives need to be explored – especially as we in Europe have a clearly expressed EU policy of

strengthening the so-called ALM (archives, libraries and museums) cooperation. I believe it is very important for the citizens we all serve that we try to look at our work from an overall perspective in order to see where we may be able to cooperate to give the citizens a better service, and thus broaden the group of partners.

From a more practical point of view, partnerships with people who can help us promote 'the good cause' are a well-known and successful way of reaching out to the public. In 2005 the Danish Library Association ran a large campaign for the modern public library, and formed alliances with well-known people from all parts of our society. We had our Minister of Culture, we had sports stars, famous cooks, scientists, musicians and politicians from all over the country promote the use of the library. It was very successful. As a nice side-effect we gathered new ambassadors for the libraries – Figures 8.1–8.3 are three examples.

Figure 8.1 **Line Daugaard is a former member of the Danish National Women's Handball Team and three times Olympic gold medallist**

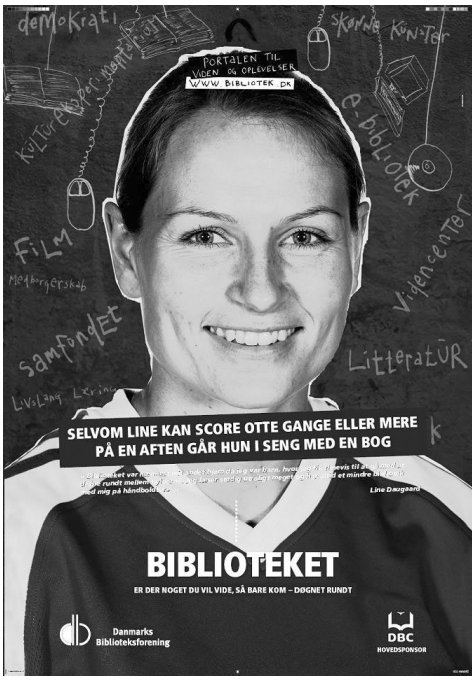
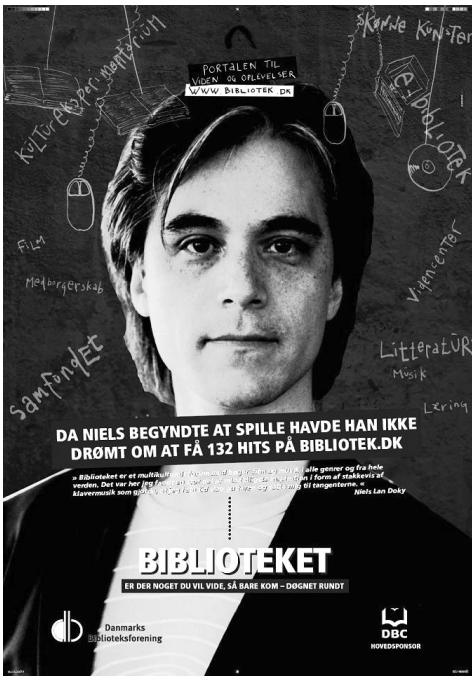


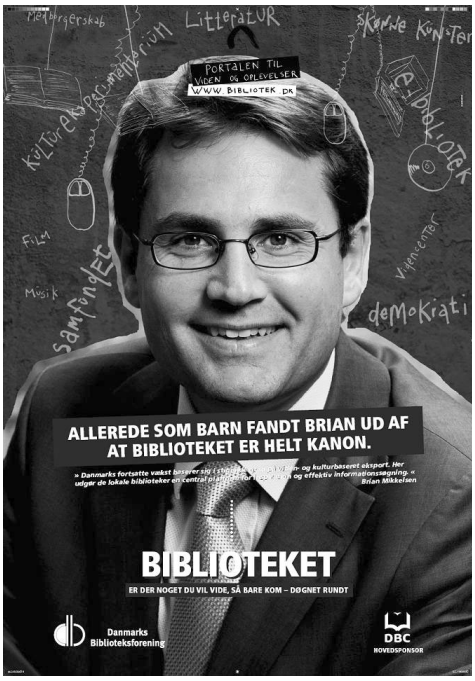
Figure 8.2 **Niels Lan Doky is a world-famous pianist, mainly playing jazz, but pop and classical music are part of his repertoire**



International cooperation

International cooperation is a different kind of partnership between libraries. In times of change we need to inspire each other and learn from each other, and we need to be able to advocate for libraries at the global level. I therefore see an increased need for international cooperation – not so much for making mutual standards and guidelines, as was often the case in the twentieth century, but more in order to form strong international advocacy. That is the reason why the Nordic Library Associations especially have worked hard within the International Federation of Library Assocations and Institutions (IFLA) to make it become a more modern and more political organisation – one able to cope with the challenges of the twenty-first century. One of the recent examples of global lobbying was the library lobby around the already mentioned WSIS in 2003 and 2005,

Figure 8.3 **Brian Mikkelsen is Danish Minister of Culture and since 2001 has been a member of the Conservative People's Party**



organised and coordinated by IFLA. The WSIS was a UN initiative together with the International Telecommunications Union to further the development of an inclusive information society. The goal of the global library lobby was to make sure that libraries were included in the declarations and action plans from the WSIS as a central partner in creating an information society with room for *all* people. In this effort IFLA worked together with national library associations all over the world, and the mutual lobby was based on various manifestos and declarations to support the international and national lobby initiatives.[1] I am very convinced that we will see many more initiatives like this one in the future.

The global society is becoming a reality, and makes us increasingly dependent on international legislation and treaties. Therefore we can no longer just see our national library development isolated from the international development, with the copyright issue as one of the most obvious examples.

Conclusion

Today, public libraries in Denmark still play a central role in education and culture in the local communities. Almost 80 per cent of the population use the libraries on a regular basis. But it cannot be taken for granted that this will still be the case in the future. We can see that the pattern of library use is changing, especially among children and young adults. Their media use changes so often and so rapidly that it is a huge challenge for libraries to give them a relevant service. In our view this is just the most obvious sign of change. If we are not able to become much more user-oriented, much more adaptable to a changing environment and more visible, we will not be a central part of tomorrow's community.

Does it matter – except for the library staff? Is it all right if people get their information and cultural input from other sources? I don't think so. The reason we also need libraries tomorrow is the same reason we needed libraries in the first place. Libraries secure the basis of a democratic society; they ensure that all people, independent of religion, political affiliation and social conditions, have a basic right to free access to information and culture, and to quality and guidance. Even with Google this is just as important as it has always been. And that is why we need to lobby for libraries – in a way adjusted to the demands of the twenty-first century.

Note

1. See www.ifla.org for more information on this initiative.

9

The political framework for public libraries in the Netherlands

Marian Koren

The library landscape and politics

The public library system in the Netherlands consists of three layers of library services related to three levels of government, serving about 16 million inhabitants, of whom a number are from immigrant backgrounds. At the local level about 1,100 public libraries are financially supported by local authorities, which provide on average 80 per cent of the libraries' funding. In addition, 15 per cent of library income is through users (membership and overdue fees) and 5 per cent through other paid activities like room rent, courses and lectures.

Most communities have a library or mobile service (60 buses in total). Local libraries can have a service contract with a provincial library service organisation. There are 12 provinces (ranging from 400,000 to 2.5 million inhabitants). At the provincial level, the provincial government subsidises regional library infrastructure, programmes and projects, executed through the provincial service organisations and some libraries with regional tasks.

At the national level, the state (Ministry of Education, Culture and Science) subsidises the Netherlands Public Library Association as a sector institute for maintaining and improving the public library network. This includes tasks for professional quality, innovation, IT, promotion of reading and a central lending collection facility for foreign languages. A major task was added in 2007: cooperation with services for the visually impaired and travellers. The association receives membership income from all public libraries. Other income is received through applying for major IT projects, especially to build further on the digital library.[1] Central library and information services are handled by NBD/Biblion

(a merger of a former department of the association and the Netherlands Library Service, NBD), a partly non-profit library supply foundation established by public libraries, booksellers and publishers in 1970.

Development and legislation

The initiatives of community groups, churches and liberal or charity institutions have played a substantive role in building up the Dutch welfare state. Dutch public libraries were set up by these groups and gradually received funding from the state and local governments. Nowadays, public libraries still are mainly private non-profit foundations and receive about 80 per cent of their funding in local subsidies. Contrary to international principles of the public library, Dutch public libraries have maintained the roots of a readers' association, including a subscription fee, at least for adults. Nevertheless, a large network of public libraries has been established, with around 4 million members and counting 8 million visits a year.

After the Second World War provincial library centres (PBCs) were created as service organisations, and from the beginning of the 1950s the transformation of rural provisions into proper public library services became a reality. PBCs developed the logistics to set up one library after another through acquisition of library stock, recruitment of staff, management and financial administration, library architecture and furniture and mobile services; in later years library automation, marketing, public relations and institutional services have become part of their programme in addition to the tradition school services.

The 1975 Act for Public Library Services confirmed this structure: libraries in communities with fewer than 30,000 inhabitants should have a contract of cooperation with a PBC in order to receive state funding, which was in fact paid directly to the PBCs. Even after the 1987 decentralisation of state subsidies and responsibilities to local and provincial governments, most smaller libraries continued their service contracts with the PBCs on a voluntary basis. The Welfare Act of 1987 stated that management and financial administration were obligatory services to be paid for by provincial subsidies and performed by the PBCs. Under the 1994 Act on Specific Cultural Policy the common, joint responsibility of the government levels is to stimulate the formation of library networks.

In the late 1990s a concentration of local government (economy of scale) was undertaken, resulting in a smaller number of local authorities. Local

and provincial governments now have more freedom to develop their own library policies; subsidies are no longer earmarked; local libraries and PBCs – gradually renamed provincial service organisations (PSOs) – also have more freedom to develop and innovate services. This decentralisation has led to a number of differences in library services all over the country: differences in access, user fees and quality and variety of services.

Bibliotheekvernieuwing: restructuring and innovation

Based on advice from the Council for Culture and a government report (the Meijer Report – Meijer, 2000), a restructuring of library organisations was started in 2000, taking a different form in each province. The original idea of upscaling was to create larger library organisations, called 'base libraries', going beyond municipal/local authority boundaries. In this way it was believed that library organisations would improve professionalism and specialisation, and have the necessary scale for the new information infrastructure. Libraries have made up their own provincial network plan and receive support from their provincial authority. This means that there is variation in structural provincial cooperation and development: at the national level, the three government levels have signed a contract (2003) and annex (2004) to cooperate for the new structure.

The Minister of Education set the tone with his perspective report for 2003–2007, *More than the Sum*:

> For many, the public library is the primary culture portal. It is the most commonly used and lowest threshold cultural institution in our country, as confirmed by the evaluation of the *Actieplan Cultuurbereik* [Action Plan Cultural Reach]. Almost all primary schools have a structural relationship with a public library for cultural-educational and education-supportive activities. The libraries will continue to play an important role as an instrument for promoting cultural awareness. However, the potential of libraries as wide social providers extends beyond culture alone. The service provided can be used much more effectively than is currently the case. The library is a public knowledge institute, being both a source of information and an active and expert collector of information in every conceivable area. It is an important educational partner in the

> development of language, reading and information skills within the framework of the *studiehuis* [independent learning at upper secondary level] and for supporting teachers. At the end of 2001, the library sector, the IPO [Association of Provincial Authorities], the VNG [Association of Netherlands Municipalities] and the State started an innovation process so that the library can retain and strengthen its pivotal role in the cultural infrastructure and in the knowledge society. During the coming Policy Document on Culture period, the process of innovating the public library system must largely be concluded, not only administratively, but primarily from the content and quality points of view. Moreover, the special library provisions for the visually challenged are currently being improved as regards their organisation and technology. The association together with the public libraries is an area that requires specific attention. As far as the innovation process of the public libraries is concerned, I am able to promise a considerable financial contribution from the intensification resources for the policy area of Education, Culture and Science which can increase from two million [euros] in 2004 to an amount of twenty million [euros] in 2007 and beyond. Among other things, this money will be used to develop new products at national level, for example in the area of IT. The funding will also be used to encourage best practices and to implement a quality care system for the library system. I am going to consult with the covenant partners concerning the results that have to have been achieved by the end of 2008, the contribution everyone needs to make and the way in which the resources are to be used. My aim is to have a revitalised system by the end of 2008, from both the quality-content and organisational perspectives. (Ministry of Education, Culture and Science, 2003: 17)

The Netherlands Public Library Association is a partner in the execution of the restructuring and innovation plans (*Bibliotheekvernieuwing*). Innovation and accountability are key words for the authorities. Thus a *Guideline for Base Libraries* (Netherlands Public Library Association, 2005) has been adopted, creating a common document for the joint authorities and the professional field. The authorities required a quality indication and standard for the annual subsidy of public libraries. Is the subsidy well spent and on the right issues? Therefore, a system of certification has been set up – a separate bureau organising self-evaluation and audits.

In order to support the management and human resources of public libraries, the association has prioritised a sector-wide quality improvement plan. Cultural governance is one of the new focal points. The Council for Culture, which advises the government on cultural affairs, including public libraries, writes in its report 'Innovate, participate! A cultural policy agenda for the Netherlands':

> The task of cultural institutions is not only to act as good stewards of the cultural treasures they have in their care and which largely belong in the public domain. It is just as important for them to use the new opportunities to maximise the availability of these treasures for social and – subject to certain conditions – economic use. The users, and not the material, are the priority. Cultural institutions will therefore have to act more like guides or mediators in order to show users the way… Exclusive rights constitute a major risk for archives, libraries, broadcasting companies and the press. To them, free access to high quality information and culture is an essential condition for their proper functioning. Only then can they identify, monitor and structure that same high quality information and culture in a reliable manner and make it meaningfully accessible to as many people as possible and therefore allow it to fulfil the role entrusted to them in a democratic society…
>
> Public content as stored in museums and various sorts of archives must therefore be protected against usage which is oriented primarily around making profit via the Internet or other digital channels. As far as libraries are concerned, a solution must be found for the problem that copyright protection of publications via loan fees and licences for digital material causes cost increases that they cannot pay and results in access to this material being limited to, for example, members of a university library. Only then will a virtual public space be created within the digital domain to which everyone has access, on account of the basic right to information, and where quality, reliability, completeness, authenticity and diversity of culture and information are guaranteed. (Council for Culture, 2007: 29–30)

One may conclude that at the national level authoritative bodies are engaged with public libraries, as reflected in their policies and advice. At the same time, they expect major changes in the field.

Political perceptions: a research project

Around this major shift, initiated by the adoption of the Meijer Report (2000), a research survey was conducted in 2002–2003 as part of the IFLA-initiated project 'Political perceptions of public libraries', coordinated by Professor Bob Usherwood of Sheffield University. There were three main questions.

- What perception do politicians and policy-makers have about public libraries, and what does this mean for different target groups?
- What is the value of these institutions in our Western democracy; do they contribute to economic development?
- To what extent do libraries help to realise government policies?

The Dutch study used the international survey schema and was based on interviews with 37 politicians and 37 policy-making officials. Because it was election time, it was difficult to find national politicians willing to respond, therefore local and regional respondents were mainly used, although the total number cannot be regarded as representative enough to draw national conclusions. Nevertheless, the study offers a qualitative insight into their foremost views on public libraries. It appears that politicians and civil servants have different perceptions: whereas civil servants emphasise the cultural and information function of the public library, politicians seem to put much greater value on its social function.

Both groups of respondents, however, agree as to the importance of public libraries, although they also acknowledge that libraries have had insufficient attention from policy-makers in recent years. Libraries have been subsidised as par for the course, without understanding of or involvement in provision or end goals. In general the subsidies granted to libraries are high, highlighting the importance given to libraries by government. Grants are barely questioned because libraries are seen to reach a large number of people.

The innovation and restructuring of the public library sector that must be implemented in years to come demand that authorities take a different view of their role. This will have a positive effect on the involvement of politicians and civil servants in the public library sector, as their satisfaction increases when innovation is realised, services are distributed adequately and positive cooperation networks are built. This supposition has in fact come true. Involvement has increased through the large library renovation and restructuring operation that was undertaken from 2004 to 2007. After this major restructuring operation, local politicians

are now more closely aligned to public library policy and draw local libraries into other types of local policies, e.g. youth policy, social welfare services, etc.

In this research the politicians and civil servants regarded their poor contact with library administrators and managers as disadvantageous. The public library is seen as providing an essential public service which contributes to government policy. Most believe public libraries are essential for our democratic society and that users should be charged for borrowing materials. Less agreement was expressed in relation to the educational support function of the public library; the idea was that the library should promote freedom of information, or that it is instrumental in realising changes in society.

The respondents acknowledged the fact that they were unable to measure the value of public libraries effectively, which means that evaluation becomes subjective. Financial aspects are too central as assessment criteria. Both politicians and civil servants spoke of the influence of ICT developments on the future of library work, and they also mention numerous threats and opportunities for the sector.

Defining and judging library policy

Many respondents found it difficult to indicate what evidence they use in assessing the value and impact of the public library service. Both politicians and civil servants admitted relying primarily on financial results and limited figures concerning numbers of users and borrowed materials. The provincial and national representatives cited examples such as effectiveness of the network, results of cooperation with other sectors and the way libraries were able to innovate their services and reach certain target groups. No concrete or objective information was available.

Two of the respondents mentioned a publication by VNG, *Aandachtspunten in gemeentelijk bibliotheekbeleid* (Jongmans et al., 1995), which they use when evaluating the library. The financial framework is the single most important thing that influenced politicians when taking decisions about the public library service. It is the real limit to freedom of action within policy-making. Innovation was a second important aspect. A city councillor commented: 'Moaning about more money for existing services doesn't get me very far. But if the library is able to present us with innovative and unexpected proposals which also reflect and support our policies, I'm more than willing to fight for them.'

A number of respondents believed government policy in this field was being developed in a rather unprofessional way. 'We can't seem to succeed in comparing the library interests with the interests of street maintenance or building new houses. In the council everyone points to the level of library subsidies, while it is almost nothing compared to the funds spent on city renewal.'

What are missing are good instruments which objectively measure the value of the library. One civil servant told of how concrete figures of numbers of library users in comparison with those of other social-cultural institutions in the city had suddenly led to more funding for the library.

A little over a quarter of the respondents had user surveys available, but it was unknown what position those survey results have in other provinces. The positive character of these surveys made a big impression, but at the same time left questions to be answered. Many respondents admitted that there was still much to be learned about the public's wishes, but nothing had been done to address this. Civil servants especially felt that it was up to the library to collect such information. One out of five respondents received the library journal *BibliotheekBlad* on a regular basis, and the majority used it to obtain information. One in three respondents surf the website of the Netherlands Public Library Association occasionally.

IT effects and the future

Looking back at this survey, the responses to questions on the role of IT and the internet in affecting library services are remarkable. Half of the respondents did not have an answer, others demonstrated a large variety in their response, and in the meantime (five years) a number of these expectations have been realised. For example:

- the internet will improve access to library services;
- in the future the library will become accessible 24 hours a day;
- it will be easier to ask questions virtually;
- libraries will have to gain a great deal of knowledge and skills to be able to keep up in this field;
- many people will no longer visit the library and will instead find information through the internet;
- the library has been 'playing with its books' too long to acquire any ICT expertise;

- the library must pave the way for everybody to have access to digital information, and use it effectively;
- libraries should be the authority on ICT in our community and should play an important role in supporting schools and other non-profit organisations;
- libraries should teach not only their customers, but also more challenging target groups, to work with computers;
- 'library costs will be sky high because of the investments necessary'.

The views on the role of IT also influenced the general view on the future of the public library service. On the one hand there were positive responses counting the opportunities: there will be increasing interest in the knowledge community, in which the library has an important part to play, meeting the increased needs for information. The increasing use of IT and the professional service of the library can be of assistance to other organisations, which can also find a presence in the library. Other strong points included the image of reliability and quality, the large audience and the wide distribution of library access points. Restructuring the library sector offers new possibilities for cooperation.

But threats for the future were identified, such as the increasing costs of library services, and governmental interference with library work without financial remuneration. Furthermore, the dusty image and the lack of IT and marketing expertise might hamper development. One may also take into account that people tend to read less, and some branches might need to be closed. Finally, doubts on management skills were expressed: 'Lack of decision-making skills and entrepreneurial flair within the library. Lack of demonstrating involvement in (local) political themes such as safety and security for citizens, or public communication between citizens and government, and thus missing the opportunity for innovation.'

By way of recommendations, some civil servants mentioned that a library law should be reinstated in order to manage the government subsidy to the library sector more effectively. They also predicted that 'the planned enlargement of scale will not in itself lead to an improvement in library services. We are concerned with the quality of library management. It is difficult to find new library administrators, just as it is within the educational field.' They hoped the current informal relationship between politicians and library administrators could be converted to a more structured one, and that something would be done to the 'introvert character of libraries'.

The results of the survey were presented on several occasions to discuss the outcomes with library managers and local authorities. The whole report was available online at the association's website.[2] What has happened since then?

Political awareness-raising

Because of the major library restructuring and innovation process, library boards, managers, staff and also local and regional politicians and civil servants had increasing contact with each other and were confronted with the obligation to work on a local agenda. In other words, political awareness-raising had started.

The *Guideline for Base Libraries*, as a common point of departure, was transformed into a position paper presenting the library as 'Axis of the changing society' (De openbare bibliotheek, 2005). The essence of the public library service and its significance for the current society are presented in this paper and also in a dynamic PowerPoint module, which made the paper easy to present everywhere. Other activities were also undertaken by the Netherlands Public Library Association.

In order to support local libraries with their local agenda-setting, lobbying at the municipal council, etc., the association developed a number of lobbying instruments. These contained tools for making the library more visible and attractive for partners, e.g. schools, social and youth workers, arts centres, kindergartens, etc. The lobby toolkit included a DVD, 'Look! The library!', which was sent to all libraries for them to show it to municipalities and partners for cooperation. It was also made available in English. Another DVD, 'Look on knowledge', focused on what the library can do for schools, educational institutions etc. This was followed by a leaflet, 'Helpdesk for education'.

To help in the local lobby, library managers were identified who were willing to serve as a lobby-buddy: a number of library leaders have made themselves available for lobbying advice for colleagues. Furthermore, a course on 'Lobbying – effective contacts with the local authority' was designed, giving advice on how to lobby locally, build up networks and partnerships and influence library development, and this was followed by many local management teams and boards.

Some basic information brochures were developed and distributed, sometimes after an expert round-table or conference. For example, the brochure 'At the heart of the vital society' is based on an essay by Bert

Mulder, director of the Information Workshop. It tells the story of the modern library.

The prospectus 'The library, a hidden treasure in your municipality' was another document produced to help start the local library agenda and discussion with the municipality. What arguments could library boards and management use to convince their local authorities? There are also notes on arguments for libraries: 'What is so important about libraries and why is innovation necessary?' A number of arguments and responses were collected as notes and mailed to the libraries and municipalities.

The election of local and provincial representatives presented a major opportunity for libraries to lobby for their case. Guidelines for local election programmes were elaborated, and included a number of recommendations for library lobbying before the local elections. But one shouldn't forget the 'after sales'. So once the elections were over, a new set of help was distributed: 'Lobby after the elections' responded to the question of how to lobby once the elections were over. The association had tips, but also needed the addresses of the newly elected members and sent a letter to all local councils related to the national library lobby activities.

Furthermore, the need for better data was felt, so in many ways the discipline of collecting and providing statistics was improved. In 2007 the figures could be completed online and give immediate results.[3]

Working with stakeholders

For a long time, librarians working in non-profit organisations have been reluctant to work along political lines and contact their immediate stakeholders on a regular basis. Through the structural innovation process at all levels, the ties between libraries and their stakeholders have become closer. Working for a common agenda, putting library activities on the agenda and formulating library plans in the local and regional context have helped mutual understanding. Instead of opposing politicians and civil servants, the general orientation is now towards service: how can we help and support them to achieve their aims and objectives? And the library has many possibilities to do so and to contribute. In the end this will pay off for the library as well, as a positive connotation and image are associated with the library. Some of the stakeholders are listed below, to give an idea of how many and different actors are involved in the political framework of libraries and the development of policies.

Ministry of Education, Culture and Science

The OCW is the Ministry of Education, Culture and Science. Although public libraries are primarily the responsibility of local authorities, the central government has an overall interest in libraries as an integral part of society, culture and education. The ministry also contributes financially to the process of library innovation.

Bureau Bibliotheekvernieuwing

The Bureau Bibliotheekvernieuwing was founded in 2002 to coordinate, stimulate and facilitate the process of library innovation which started officially in that year. Library innovation is based on a contract between the OCW, the Association of Netherlands Municipalities, the Association of Provinces and the public libraries, represented by their association. The bureau ceased to exist in March 2008, but tasks will be continued within the Library Association as the national sector institute.

Association of Netherlands Municipalities and Association of Provinces

The VNG is the organisation for municipalities. Consultation with the other two layers of government takes place on a regular basis. The 12 provinces in the Netherlands have their own umbrella organisation: the Inter Provinciaal Overleg (Association of Provincial Authorities – IPO). There is also regular consultation with nearly all ministries of the central government in The Hague to see to the interests of the municipalities. The Dutch government comprises three layers: the middle layer consists of the 12 provinces, which share the responsibility for good library work and library innovation with the central and local governments. Inter-provincial cooperation is channelled through the IPO.

Expert centre for cities and rural areas

Some ministries and a number of cities have formed an alliance to share knowledge and expertise in order to vitalise inner-city areas and solve common problems. This expert centre has also focused on public libraries, and supported making library innovation and city development a well-known issue by offering workshops, knowledge exchange etc. In

the same way initiatives have been taken to vitalise rural areas and smaller cities and villages, including library services. This resulted in the DVD 'Look! The library!' being produced in two versions: one for cities and one for rural areas.

Instituut voor Publiek en Politiek

The Instituut voor Publiek en Politiek (IPP) – the Dutch Centre for Political Participation – is an independent organisation that promotes political and social participation, both in the Netherlands and abroad. Some of its projects are subsidised by the central government, while others are commissioned from provincial and municipal authorities, other government agencies and non-governmental organisations. The IPP promotes and organises debates, meetings and conferences on topical political issues; designs and implements projects to encourage citizens to participate in political decision-making; develops new forms of communication between citizens, politicians and civil servants; promotes European citizenship by organising courses and seminars and by setting up a European political education network; and, finally, creates websites and produces educational material in digital form and in print. Cooperation with libraries has taken place on the occasion of elections and seminars on governance.

Leadership with a background in politics

In the Netherlands Public Library Association and also in some libraries, staff members and some librarians are active in politics. In general this is considered positive for the libraries, as they become much better known in the political world, and also these librarians are valued because of their wide knowledge. They can really give content to an issue, whereas many politicians mainly work with their political knowledge.

The advantage for libraries is that these librarian/politicians know far better than average how the political system works, whom to contact, what network to address, when and how. A good example is The Hague Public Library under the leadership of Burgers van den Boogaert. He was very active in making libraries visible in the city, and demonstrated the library as the best institution for and practical example of integrating immigrants and other groups into society. In this case the library of The Hague is part of the local administration. Another example is the

Rotterdam Municipal Library, where the library is really a facilitator for the Rotterdam municipality to connect politicians and citizens. The library organised hearings for politicians: every citizen could come with suggestions and complaints, and have a chat with the politician on duty. In such a case, the library is truly the living room of the community.

Elections

Other examples of relations between libraries and politics can be seen at election time.

Whether local, provincial, parliamentary or European elections, libraries collect the programmes of all parties and invite them for lectures and debates. For the delicate referendum on the European Constitution (2005), the Netherlands Public Library Association together with libraries even organised a dedicated website called 'independent information'.[4] The Europe Direct information service in a number of main libraries is especially focused on European politics and democratic processes. The Dutch Centre for Political Participation compares party programmes and presents a digital election guide. It is rare that 'libraries' are a special subject in those programmes, so there is a need for constant and thorough action from the library side. Politicians are interviewed for the library journal and invited to speak, especially on what they think of libraries. In this way, libraries can achieve a higher profile. Here are some examples of how these schemes worked in practice.

- *Provincial elections*. Sometimes there is special support for the library case. On the occasion of provincial elections, the immigrant/refugee author Kader Abdolah (2006) wrote an open letter to the provincial politicians and explained to them the importance of libraries for refugees and immigrants. He learned the first 20,000 words from a Dutch children's book and wrote his first book in Dutch with them, telling a story in his own way. This was an example of how the library means much to many people and should have a place in the authority plans: 'You have a unique possibility to connect the library with social inclusion, *inburgering* [new citizenship], education, youth policy.'
- *Local elections*. Libraries organised 'speed dating' with candidates for the local council from all parties: the focus was on safety and education. In three rounds of 20 minutes politicians and citizens gave their views and changed partners every two minutes. Local press and media were present to involve a wider audience.[5]

- *Young people*. Libraries are using several means to stay connected with young people and encourage participation. A number of libraries organised special *Biebnights* open to young people aged 14–18; they received facilities and a budget to organise a cultural programme. In one of the libraries, a debate between young people and politicians is organised before the *Biebnight* starts. Young people might not know what politicians are doing, but the reverse may also be true. The youngsters invited the politicians to come to their schools. The library serves to connect the community.[6]
- *National elections for Parliament*. The Netherlands Public Library Association prepares a simple ABC book for parliamentarians explaining why the library is so important and what innovations and news have been happening. All members of the two chambers receive a copy. Because of the success of libraries local politicians also want copies, so they order large numbers for local advocacy.[7] As a principle, the library will not put its neutrality and independent status at risk, so all parties are treated equally and get the same information and facilities, e.g. leaflet displays, information market, etc.
- *Public affairs*. The need for public affairs has become very urgent. But the function is still under development: finding the right staff is not easy. Candidates should know more than public relations: they should be knowledgeable about the political and media world, and also about the basic values and principles of the public library and its long and strong story.

Isn't that professionalism: to tell the story a thousand times, and keep the audience interested, because it is about them and their lives in society? This is why librarians must stay alert and be aware of the political framework in which they operate. Investment in public affairs is necessary: there is considerable education and development at stake for library users and generations to come.

Notes

1. See www.bibliotheek.nl.
2. 'Political perceptions of public libraries in the Netherlands', a study into the image held of public libraries by politicians, civil servants and policy-makers. Part of international research by the IFLA Library Theory and Research Section, undertaken under the authority of the Research Department of the Netherlands Public Library Association (NBLC). See www.debibliotheken.nl/content.jsp?objectid=3893&highlights=political,perceptions.

3. See the association's website: www.debibliotheken.nl/content.jsp?objectid=13400.
4. See www.onafhankelijkeinformatie.nl.
5. Examples from the libraries at Drimmelen, Geertruidenberg, Gilze&Rijen and Oosterhout are at www.debibliotheken.nl/content.jsp?objectid=6007.
6. An example from Library Stede Broec is at www.probiblio.nl/nieuws/bericht.asp?422.
7. See www.debibliotheken.nl/content.jsp?objectid=3679.

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Key organisations and websites

Association of Dutch Municipalities: www.vng.nl.
Boekman Foundation, study centre and library: www.boekman.nl.
Council for Culture: www.cultuur.nl.

FOBID (Netherlands Library Forum): www.fobid.nl.
Interprovincial Authority Forum: www.ipo.nl.
Lobbyinstrumenten, dedicated website of advocacy tools developed by the Netherlands Public Library Association: www.debibliotheken.nl/content.jsp?objectid=5028.
Ministry of Education, Culture and Science: www.minocw.nl/english.
Netherlands Public Library Association: www.debibliotheken.nl/english.
Social and Cultural Planning Bureau of the Netherlands: www.scp.nl.
Statistics Netherlands: www.cbs.nl.

10

A unified approach to the teaching of library studies

Michael Gorman

Introduction

At one time, library studies and library practice were localised and rooted in local, regional or, at best, national policies and practices. The trends towards globalisation in all aspects of human life and the decades-long drive for standardisation in many aspects of library work have made the localisation of library practice neither desirable nor sustainable. If library studies are to be a universal and unified field, it follows that education (teaching and research) in library studies must be based on internationally accepted notions of the boundaries of the field and internationally accepted definitions of its components. Because those notions and definitions have not been delineated fully, there is a general lack of consensus on the nature and boundaries of librarianship in the twenty-first century. The boundaries between librarianship and information science (and between library studies and information studies) are little understood and less charted.

I propose a definition of librarianship that is centred on the human record – that vast assemblage of messages and documents (textual, visual and symbolic) in all formats created by humans since the invention of written and visual communication. Given that focus, library studies are seen as the field of those professionals who assemble and give access to sub-sets of the human record (collections); who list and organise those sub-sets so that they can be retrieved; who work to ensure that records of those sub-sets are integrated to allow universal access to the whole human record; who are dedicated to the preservation and onward transmission of the human record; and who give help and instruction in the use of the human record. Library studies embrace all forms of

recorded human communication – print on paper, manuscript, recorded sound, audiovisual materials, electronic resources and documents, etc. – and seek to provide equal access to all those forms. Library studies are informed by a set of core universal values – intellectual freedom, service to individuals and society, stewardship of the human record, universal access, etc. – and are conducted within an ethical framework that embraces these values. This chapter outlines a framework for education in library studies based on this definition.

Education in library studies

I wish here to delineate the essential features of programmes of education that prepare library professionals to work in libraries or related areas. Also, I wish to describe what those professionals need to have acquired in the course of attaining an appropriate qualification that is accredited by a national or supranational professional association. That qualification may be a university degree (at the bachelor's or master's level) or a professional qualification, depending on the educational structure of the country in which the qualification is obtained. This description, of course, raises two questions. What is the appropriate venue for and level of library education? Also, what is the role of the professional association in authorising and/or accrediting the qualification?

Basic library qualifications

One valid definition of a 'profession' is 'a calling requiring specialized knowledge and often long and arduous training' (Webster, 1976). Here one can talk about the nature of that specialised knowledge in librarianship, the form the training can take and if there is a unified approach to education in library studies. That specialised knowledge is best acquired after a general education of a suitable quality and at a suitable level. In many countries a general education will be acquired in the course of taking a bachelor's degree at a university or college, and therefore an education in library studies will be at the postgraduate level – in the form of a master's degree or diploma. In other countries and educational systems, the general education will be acquired in school, normally up to the age of 18, and education in library studies will be within a bachelor's degree or as structured professional training of

another kind. Whichever of these is chosen, there is a general consensus that a librarian should be someone who not only has specialised knowledge but also a broad knowledge and understanding of the liberal arts and sciences. In general, we can say that in all countries library studies should be built on the basis of the best general education that is available. The important thing is that the qualification to be a librarian should certify that the holder is an educated person who possesses specialised library knowledge and is well equipped to use that knowledge in library work. Further, that library qualification, whether acquired in a university, college, professional school or other venue, should be of a consistent quality and reflect a consistent content within the educational system of the country in question.

The role of professional associations

One hallmark of a profession is that its members exercise control over professional education. This can be done in a variety of ways, ranging from complete control by the professional association – in which the curricula, examinations, etc., are prescribed – to loose oversight of the educational process. Each country and each association will have to decide how to approach this question, but a national profession that has no, or minimal, control over its education will reap the inevitable consequence of an ever-growing gap between professional education and professional practice.

The field of library studies

As stated before, the essential character of the field of library studies is defined by reference to the human record. In other words, it is concerned with recorded knowledge and information in all formats, and with the services and methods to assist in accessing that recorded knowledge and information. It is concerned with the management and use of the human record and deals with the creation, communication, identification, selection, acquisition, organisation, description, storage and retrieval, preservation, analysis, assessment, dissemination and management of recorded knowledge and information. Library studies are based on shared values and ethical standards – statements of those values and codes of ethics will vary from country to country, but each statement and code will contain a kernel of values (e.g. intellectual freedom, equality of

access, service) and ethical conduct (e.g. confidentiality with respect to library use, openness to all points of view, no discrimination against any group in society) that are common to all libraries and all librarians.

This definition of the essential character of library studies contains, in outline, the broad subjects with which programmes for professional librarians should be concerned. Libraries, great and small and of all types, have a variety of services (listed below) in common and use all appropriate technologies to increase the cost efficiency and cost benefit of those services. It follows that a core professional library curriculum should cover these services and the various forms they take in different types of library, as well as the impact of technology on those services.

- *Information and knowledge creation and communication*. It is very important that librarians understand the processes by which published and unpublished carriers of recorded knowledge and information (hereafter 'documents') are created. Libraries are concerned with published and unpublished printed documents (books, journals, music, maps, etc.), manuscript texts, sound and video recordings, microforms, sundry audiovisual materials, three-dimensional created objects, realia and, of course, digital documents and resources of all kinds. Bibliography (the study of printed documents) has a long scholarly history not matched by other means of communication, but the educated librarian should also have detailed knowledge of all the processes by which all forms of communication are created; the means by which they are disseminated; their history, present and future; and the role that each plays in library services.
- *Identification and evaluation*. Librarians have to be able identify relevant documents in all media in order to carry out the great majority of their professional tasks. Knowledge of the widest range of resources in which documents can be located is therefore an essential component in a library education. Once identified, those documents have to be evaluated, and the critical thinking necessary for that evaluation is an essential tool for the educated librarian.
- *Selection*. Libraries today have a variety of 'collections'. The most obvious is the collection of tangible objects that the library owns and houses. There is also the universe of such collections owned by other libraries to which the library has access by means of union catalogues, inter-library lending programmes, document delivery processes, etc. Then there are the intangible objects (electronic documents and resources) for which the library pays (by subscription and otherwise).

Lastly there is the universe of intangible documents that are available to the library and its users by means of the computer access provided by the library. Selecting material to add to the first and third of these 'collections' once relevant documents have been located, identified and evaluated (collection development) is a primary professional activity in which all librarians should be educated. Further, the educated librarian should be aware of policies and approaches by which all libraries build their collections.

- *Acquisition*. Once tangible and intangible documents and resources have been identified and selected the library must either acquire them or arrange access to them. This task (acquisitions) is often performed in great part by workers other than librarians, but an educated librarian must have a more than passing acquaintance with acquisition and access processes (including such acquisition mechanisms as approval plans). Although libraries acquire and give access to documents and resources from both public and private sources, the latter involve some specific issues. A library studies graduate should be conversant with the private (and increasingly internationalised) sector that encompasses publishers and vendors, and the legal and financial implications of interacting with that sector.
- *Organisation and description*. The organisation and description of documents by means of cataloguing, classification and indexing (hereafter 'cataloguing') are the intellectual heart of librarianship. The bibliographic architecture that results from cataloguing according to national and international standards is the vital element in all library cooperative programmes, and the structures (codes, classification schemes, subject heading lists) that create that architecture are among the basic documents of librarianship. It is worth noting that cataloguing is applied to all four types of 'collection' (see *Selection*, above), and in fact makes each type of collection (each sub-set of the human record) feasible and accessible.
- *Storage and retrieval*. Each medium used for documents is stored in ways appropriate to that medium, and retrieval of those documents is facilitated or hindered by the means of storage. The educated librarian must be fully conversant with storage and retrieval systems for all documents (tangible and intangible).
- *Preservation*. There is considerable concern about the preservation of the human record. That concern began with the 'slow fires' of books printed on acidic paper, the brittleness and fragility of microfilms and

films, the impermanence of manuscripts and all the other threats to the tangible media, and has grown because of the mutability and instability of electronic records. The educated librarian should be conversant with all the perils to human records in all formats, and with all the methods and procedures for averting those perils.

- *Interpretation*. Users of libraries, both on-site and remote, require assistance in the use of the collections to which the libraries give access. That assistance can take many forms. It encompasses reference and advisory services; librarian-faculty consultation processes; informal help of all kinds; librarians working as part of research teams in specialised institutions; recommended readings lists, lists of websites, etc.; library instruction/information competence programmes; and all other human-to-human interactions. The educated librarian should be aware of the details and strategies of all these approaches, and the scope and limitations of all sources used in these interactions.
- *Assessment*. All library collections (tangible and intangible) and all library services and programmes should be subject to continuing evaluation and assessment. That evaluation can be evidence-based or can be on the basis of professional experience. The educated librarian should be conversant with all assessment techniques and their applications in a variety of library contexts.
- *Dissemination*. Libraries, especially special libraries, have moved beyond library services based on 'waiting to be asked' to the anticipation of user needs by bringing materials and services to the attention of potential users (often called selective dissemination of information). The use of techniques such as user profiles is facilitated by computer technology. The educated librarian should be knowledgeable about such programs.
- *Management*. Libraries vary greatly in mission, size and funding sources. They may have hundreds of employees of various types or only one employee. They may own and give access to vast general collections or they may be concerned with smaller, intensively specialised materials. No matter what the type of library, there are management, personnel and financial implications requiring librarians with an education in all administrative/management issues. This part of the field of library studies is heavily influenced by, and draws upon, the wider field of management and business studies.
- *Furthering literacy and learning*. All libraries have a role to play in improving literacy levels in their society and furthering a culture of

learning. That role can vary greatly from library to library (depending on the type of library and the community served) and from country to country. The unifying principle lies in commitment to literacy and the belief that societies are improved – intellectually, financially and in all ways – when their citizens are literate and have every opportunity for learning.

- *Values and ethics*. Almost all library professional associations have a published code of ethics, statement of values and/or other statement embodying their ethical beliefs. A survey of those statements reveals both differences and unanimity. For example, the statement of policies of the Library and Information Association of South Africa (LIASA, undated) contains a reference to the importance of intellectual freedom; the statement on professional conduct (ALIA, 2007) and the core values statement (ALIA, 2002) of the Australian Library and Information Association refer to intellectual freedom and the free flow of information and ideas; and the code of ethics of the Librarians' Association of Malaysia (Persatuan Pustakawan Malaysia, undated) refers to 'the principle of intellectual freedom' and 'free and equal access to sources of information'. Other key concepts such as service, privacy and confidentiality of library users and preservation of the human record are also commonly encountered in the many codes and statements. It is evident that librarians throughout the world have enumerated, and believe in, values and ethics that are common to all, and that a thorough understanding of those values and ethics and their application should be a part of library education.

The curriculum

A curriculum for library education must provide opportunities to study the theory, principles, practice and values that underlie library service. That study should be by means of a variety of educational methods and experiences.

The preceding section delineates and defines the parts of the field of library studies, each of which should be included in the curriculum. I believe that the library profession in each country has a duty to devise and implement a 'core curriculum' of courses based on a definition of the field of library studies within that country (the national core). Further, I believe that a careful examination of the field will show that there is a core *within* each core that is shared by all. In other words, the central

field of library studies (the universal core) applies in all countries, and should be accommodated within each country's core curriculum and within the wider curriculum of library education.

Think of the curriculum of any institution giving library education as three concentric circles.

- *Universal core*. The smallest, inner circle is the core of courses that are common to all library education in all countries.
- *National core*. The second circle, which contains the universal core, consists of courses that make up the core curriculum for that country.
- *Wider curriculum*. The third circle, which contains the universal core and the national core, consists of the courses that are special to the particular institution. The third, wider curriculum will vary from institution to institution and will include subjects not defined in the analysis of the field of library studies given above.

The subjects that comprise the field of library studies can appear as part of the universal core, the national core and/or the wider curriculum. For example, the universal core would include study of the principles and practice of cataloguing, the national core the practice of cataloguing in the country or region and the wider curriculum applications of cataloguing in specific contexts. The aim must be to produce librarians whose education has given them an understanding of the theory, principles and practice of each part of the field and who understand the core values of librarianship and their application to each of those parts.

The faculty

A programme of library studies should not only cover all parts of the field as defined and delineated earlier within a core curriculum, but should also have qualified teachers who are intimately involved with the major share of teaching and research in the subjects encompassed by the field, preferably by direct teaching or, at a minimum, by curriculum development and coordination. Their teaching and research will be supplemented (but not replaced) by part-time teachers (usually practising librarians), many of whom will teach in specialised areas. These part-time teachers can enrich the quality and diversity of a programme, because practitioners as part-time teachers bring real-world experience and practical knowledge that can benefit their students greatly. In many cases, a programme of library education will be within a grouping of

programmes or a larger institution devoted to related but non-library topics (information science, education, computer studies, etc.). It is imperative that the integrity of the library programme and adequate staffing for that programme should be preserved in such circumstances.

Summary

- There is a field of librarianship based on interaction with, and the transmission of, the human record.
- This field can be mapped and defined for the purpose of library education.
- Each area of the field can be taught at three levels: as part of a universal core curriculum common to all countries; as part of a national core curriculum common to all library education in a country or region; and as part of the wider curriculum specific to a given teaching institution.
- All library studies programmes should have a teaching faculty that is adequate, in number and types of specialisation, to teach and do research in library studies.
- Professional associations should accredit library studies programmes that create a curriculum embracing both the universal and the national core curricula; teach that curriculum effectively; create research in that field; and maintain and support a teaching faculty dedicated to those aims.

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11

Is library course accreditation a political necessity?

Kerry Smith

Introduction

This chapter is not solely about the processes and politics of the accreditation situation as they apply in Australia, although much of the discussion is based on Australian experiences. Libraries are a global phenomenon and offer a sustainable information service to the many communities they serve. In order to prepare people to work in these libraries, educational programmes in librarianship are offered in many countries. These programmes vary in the training and education they offer. One way of monitoring and managing this variety is for professional associations to accredit the programmes for their relevance to the profession they serve. In order for this to happen, the associations develop expectations for the content of such programmes.

Educational programmes in librarianship

Educational programmes in library studies include introductory clerical certificates that familiarise students with library operations; library technician certificate and diploma programmes which cater for technician and higher-level library assistant appointments, as recognised in many Commonwealth countries; undergraduate-level studies which enable professional qualification, again recognised in many Commonwealth countries and becoming more common in the USA; postgraduate professional qualifications at the graduate diploma level, another Commonwealth recognised qualification; master's-level

professional qualifications as available in the USA and Canada and now in a number of other countries; and research programmes at the honours, thesis master's and PhD levels. Like other professions, librarianship in many countries has sought recognition and/or accreditation of courses at the professional level.

The International Federation of Library Associations 'Guidelines for professional library/information educational programs' were prepared by the Section on Education and Training in 2000, with the last update being in 2002 (IFLA, 2000). They are currently being considered for revision. The document recognises the 'long and distinguished history' of library education, and that educational programmes are offered at the technical, graduate and professional levels, and also at research and doctoral levels. The guidelines address the graduate and professional levels and acknowledge core elements which should appear in library education programmes:

- the information environment, information policy and ethics, and the history of the field;
- information generation, communication and use;
- assessing information needs and designing responsive services;
- the information transfer process;
- organisation, retrieval, preservation and conservation of information;
- research, analysis and interpretation of information;
- applications of information and communication technologies to library and information products and services;
- information resource management and knowledge management;
- management of information agencies;
- quantitative and qualitative evaluation of outcomes of information and library use.

The guidelines also suggest that:

- the curriculum contain a practicum, internship or fieldwork that incorporates appropriate means to allow students to appreciate the interplay between professional theories and their application in professional practice;
- methods of teaching include skills that can be transferred into workplace situations, e.g. teamwork, communication;
- the curriculum be regularly reviewed, and the LIS staff should have the oopportunity to offer consultancies to libraries and information agencies.

There is no comment in this IFLA document on accreditation or recognition processes for courses which follow these guidelines.

How do we find out about these educational programmes? The *World Guide to Library Archive and Information Science Education* was published in 1995 by IFLA (Riss-Fang et al., 1995). It has been for the most part superseded by information located on the World Wide Web (WWW): sites include the *World List of Departments and Schools of Information Studies, Information Management, Information Systems, etc.* (2007) and the American Library Association's 'Directory of accredited masters programs' (ALA Office of Accreditation, 2007). Nevertheless, a new edition of the *World Guide* is imminent.

What is accreditation?

The Shorter Oxford English Dictionary (1984: 14) defines *accreditation* as 'furnishing with credentials; authoritatively sanctioning'. Authoritative sanctioning can come in another way. The Australian Library and Information Association (ALIA)[1] prefers to 'recognise' library programmes. *Recognition*, according to the same dictionary, has a number of meanings. That relevant in this context is: 'the action of acknowledging as true, valid or entitled to consideration: formal acknowledgment as conveying approval or sanction of something. To *recognise* is to acknowledge by special notice, approval or sanction; to treat as valid, as having existence or as entitled to consideration' (ibid.: 1764).

Is there a difference between these two levels of authorisation? Since accreditation means giving credentials, this brings with it a formality in the process and implies that a person or body with the acquired and required knowledge and standing would be assessing the programme or person(s) against known standards, and awarding the necessary credentials should the programme pass tests and benchmarks. Recognition does not give credentials, rather it validates a programme or person(s) as relevant to a set of criteria against which it is assessed.

Parr (1991: 100) acknowledged a similarity between the recognition of courses by ALIA and accreditation, 'since [ALIA] assesses courses in library and information science schools against certain criteria and then admits their graduates without further examination or qualification to its professional register'. Parr (ibid.) believed that 'The real difference between accreditation and recognition in the Australian context comes down to one of authority and intention.' Perhaps these issues are minor; however, as will be revealed, the processes for each are not that dissimilar.

Why accredit?

Like other professions, the library profession is generally keen to have its members recognised in the workplace as well prepared and educated for the tasks and challenges ahead of them. This recognition carries with it the imprimatur of the relevant profession regarding the educational programmes in which its future professionals have successfully participated. It should stimulate improvement in standards and in educational institutions and programmes (Flowers, 1979).

The development of professions received considerable impetus from the scientific and technological advances of the Second World War, when it became apparent that many areas of expertise were required in the emerging and changing workforce. These levels of specialisation are generally recognised under a general professional title, e.g. medicine, which can include physicians, urologists, oncologists, anaesthetists, obstetricians and gynaecologists. The natural sciences are even more specialised: geologists have their sub-groups of petroleum geologists, mineral geologists, petrologists, exploration geologists, geophysicists, palaeontologists, etc.; and there are the botanists, physicists and biologists, for example, who also have their sub-groups.

There is a similar complexity of professional identity in librarianship. Members of the profession can take advantage of the number of specialisations it offers: these specialisations are usually achieved in the workplace, where professionals work in certain specialities or in special types of library environments. The first category includes, for example, cataloguers and indexers, and within this category can be found those who specialise in certain types of cataloguing and indexing, e.g. music, languages, subjects and the like; those who work with rare materials; and database builders. The second category includes those who work, for example, in special, theological, geoscience, law, medical, academic, public and school libraries.

Librarians have been around for centuries. However, the academic endeavour and research scholarship of the discipline do not command the same attention from associations and professional peers as they do in many of the aforementioned professions. In the natural sciences, practice is informed by research process, academic scholarship and practical know-how. The members of the natural science academies (geoscience is one example) are still considered members of their profession even though they have moved away from general/industry practice. Nevertheless, the trend to license or accredit is evident for those professionals who practise in industry. It is the academic natural scientists who, for the most part,

contribute to the extensive professional literature, and their work and writings are closely followed by those in industry (Smith, 2003).

Is this the same in librarianship? There is a professional literature in library and information studies (LIS), but much of it contains reports of practice. Some journals demand a refereeing process, and few are recognised in academia as being of a scholarly nature.[2] What of the LIS academics? Do the same patterns of membership and scholarship apply? Those LIS academics who meet the criteria for professional membership of their association(s) are able to join; and there are other categories of membership which can be used so that academics can keep in touch with professional matters. The professional interplay is, in my view, another story. It seems that just as librarians categorise their work, so too they categorise their networking and professional activity. Established groups tend to network together (e.g. the special librarians, the cataloguers, the university library community). It might be argued that so, too, do the academic community network among themselves. It also seems that in some countries a definite practitioner/educator divide exists. However, because of accreditation/recognition demands on their LIS programmes, LIS educators must also be participants in the LIS communities they serve.

Accredit or recognise?

The professional recognition or accreditation process is a considered set of events. It is generally taken very seriously by the associations that practise it, by the professionals who are members of those associations and by the academic community whose programmes are under examination. The process for library programmes is best illustrated by considering the steps involved for some of the major professional associations.

Accreditation is the preferred route of the ALA and the Chartered Institute of Library and Information Professionals (CILIP).[3] Both associations have produced comprehensive documentation for their accreditation procedures. ALIA recognises courses. An assessment of the processes and patterns of these procedures for the three associations reveals that:

- there is a history of commitment by the three associations to LIS education;
- the process is voluntary for all academic institutions;
- they all base their accreditation/recognition process on formally adopted and rigorous procedures;

- while the three associations recognise that course design is the prerogative of the institutions, they also set prescriptive criteria on which course assessment by them will be based;
- these course criteria are closely aligned with the IFLA guidelines for library education programmes;
- there is an important role for senior professional members of each association in the process;
- visits to institutions are commonly required;
- accreditation is approved by the ALA and CILIP by an accreditation board, while in the case of ALIA the recommendations of the recognition committee are considered by the board of directors, who make the final judgement;
- each association's form of accreditation varies in levels of complexity;
- the ALA and ALIA generally accredit/recognise for seven years, and CILIP for anything up to five years;
- administrative support is given by all associations;
- various review strategies are employed by the three associations;
- it appears that only the ALA levies charges to institutions for the procedure.

When we consider the work involved in the accreditation and recognition processes, we wonder why ALIA, which undertakes almost as much work as those associations which accredit their programmes, does not accredit. This has been partly explained as ALIA not wanting to interfere too much in the political climate of the host universities. This issue does not prevent other professions from seeking accreditation of programmes at Australian universities.

Parr (1991) draws our attention to the differences in educational processes at the government levels between those practised in the USA and in Australia at that time, remarking that Australian universities are self-accrediting and that ALIA had no warrant, unlike the ALA, to accredit courses on behalf of state authorities. This is still the case. As Parr (ibid.: 100) states:

> failure to receive recognition may be unfortunate and reflect badly on a school, but it would not prevent it from being accredited to teach and graduate students. It would only mean that graduates of its courses would not be admitted without further qualification to the professional register of the Association [ALIA].

At that time the Library Association (LA) in the UK approved courses, but graduates of those courses had further steps to take before being eligible to appear on the LA's professional register. This separates out academic achievement from professional training, and Parr (ibid.: 101) saw this as giving the LA control to maintain professional standards while still retaining influence among UK library schools. Parr (ibid.: 104) believed that the 'maintenance of professional standards cannot be left to schools', and argued for an even stronger approach by ALIA, since its recognition and administrative procedures were less demanding than those of the ALA and the LA.

Whether an association decides to accredit or to recognise must take into account the cost of the process. In the early days of the Library Association of Australia (LAA) course recognition process, charging institutions for the work undertaken was considered. At the time of Flowers's (1979) paper, there were views that some institutions would close their doors if they were made pay for the experience. ALIA does not levy direct charges to institutions, although there was an attempt in 2006 to do this. Feedback to ALIA from the profession and educators did not support this move and so the initiative was dropped. The costs to institutions as levied by the ALA are considerable. CILIP appears not to charge. But the costs borne by each of these associations, while variable, would be considerable.

It also appears that in North America and the UK there are some library schools that do not seek accreditation. This is not yet the case in Australia. Whether this decision is based on the cost of the process or other matters[4] needs to be borne in mind.

Is accreditation a political process?[5]

Until recently, the professions – and there are an increasing number whose educational programmes are offered at the university level today – were recognised as without peer in their areas of expertise. Experiences of more than the library profession in some university circles have indicated a desire by some university senior managers to remove professional recognition from university processes. This desire has not been widespread, though it has contributed to a general deprofessionalisation of some courses in universities in the Western world.

When the LAA began its recognition process, library associations were held in high esteem by Australian university administrators and educators, and the associations' input to the educational process was

valued (Flowers, 1979; Parr, 1991). This may still be the case, particularly in the USA, where the ALA has a wider administrative role in accreditation than just satisfying the membership and general library profession on educational standards. The steady growth in library schools in Australia from the mid-1960s was followed by an increasing mix in programmes in the 1970s. Since the Dawkins higher education reforms of 1988,[6] library schools have steadily declined in number around the country (Pawley et al., 2001).

There are some who work in Australian universities who appreciate the role of ALIA in the course recognition process, and there are those who appear not to. As can be deduced from earlier descriptions, considerable preparation is required by both the educators and ALIA. Some university library educators are of the view that their university has adequate processes in place to ensure the quality of its library programmes. This point was made much earlier by Foskett in 1978 (as quoted in Flowers, 1979: 318), who highlighted:

> a surfeit of accreditation that some of our library schools suffer from: '...in each state there is now an accrediting body, which reviews the institution and decides whether it has the necessary facilities to teach at a tertiary level and also reviews individual courses, employing for that purpose panels drawn from the profession, and from other schools teaching in the same subject area. The present Library Association accreditation policy would seem to be a direct duplication of this procedure, and to serve very little purpose.'

Although circumstances have changed since the late 1970s, such panels as mentioned by Foskett continue to exist as the universities conduct internal reviews of courses and schools, often using external reviewers. This situation is exacerbated by a higher expectation for accountability that has been placed on Australian universities by their significant funder, the federal government, with a concomitant increase in reporting requirements. The universities might then argue that the necessary checks and balances are already in place.

It also appears that library educators do not wish to be encumbered by the restrictions of the 'library' programme in their move to embrace the wider information environment and the electronic information age. Others, while going in similar educational directions, still see value in the recognition of relevant programmes by professional associations.

At Curtin University of Technology, for example, the town planning and social work programmes are two of a number which are regularly

professionally accredited, and each area involved in these programmes works diligently to meet the established criteria for accreditation. Nevertheless, the library programme at that same university has had its challenges in the last 15 years and has at least once been threatened with closure. These events have ostensibly been because of the perceived small size of the programme when compared with other areas and disciplines[7] in a university which now has a total student population of approximately 33,000. It is the view of the library studies academics involved in this and similar events that the weight of professional support and accord with relevant programmes has influenced the programme's continued existence. This support was not always evident. A major threat to close the programme occurred in the early 1990s when, although the teaching programmes were recognised by ALIA, general professional support for the school was low. The situation has improved considerably since then, but the area is constantly monitored by a university hierarchy which is necessarily driven by wider agendas.

LIS university education in Australia

Fundamental to university management issues are those of funding for Australian university education. Professional LIS education in Australia is available at the undergraduate (bachelor degree) level and the coursework postgraduate (graduate diploma or possibly master's) level. Funding for undergraduate teaching in Australian universities is supplied by the federal government, and students are now expected to contribute to this through a government 'loan scheme': the Higher Education Contribution Scheme (HECS). This scheme is administered through the Higher Education Funding Act 1988 and began with a modest undergraduate fee contribution (since increased considerably) in 1987 (DEST, 2007a). Before this, Australian university education at all levels was generally free (Pawley et al., 2001). The current federal government funding model means that undergraduate places in all disciplines at all Australian universities operate on a quota system. This can bring about internal political battles within universities in protecting quotas for less popular degree programmes from the grab for quotas by more popular programmes.

At the Australian postgraduate coursework level, educational programmes are now 'user pays', and today the fees can be offset by the government's FEE-HELP loans scheme which offers low interest on student loans (DEST, 2007a). As a significant number of the professional

LIS educational programmes in Australia are offered at the postgraduate level, the new FEE-HELP scheme should assist student numbers in these programmes. There was an interregnum of a few years between the demise of fully government-funded postgraduate coursework education and the introduction of precursors to the FEE-HELP scheme from 2002, and some Australian library programmes experienced a decrease in enrolments. Most programmes have picked up considerably since the introduction of these loan schemes, particularly as there is no quota for places, or the quota is set by the university or limited only by the resources available to offer the programmes. Anecdotally, university academics are wondering how long the Australian government can sustain these schemes and what will happen next.

Aligned with issues of funding are the ever-increasing number of new degree streams now being offered at Australian universities. Some LIS schools are fighting to retain their identity by offering their named programmes in flexible degree courses. Flowers (1979: 316) quotes from work by Selden in 1960: 'The issue of control over admissions is extremely important to any profession. This is especially true in the formative stages of a profession as it fights for recognition and struggles against the superior attitude of the established professions.' It could be argued that the LIS profession in a number of countries is now mature. But is it? What is the basis of a mature profession? Surely not one still struggling for recognition of its professional worth in the new information age? Surely not one with a struggling body of knowledge which is being rapidly cloned by other newer and more modern[8] professions?

Flowers (ibid.) takes another tack. He comments on the need to be concerned about the quality of the intake into professional courses; the need to be concerned with professional image and that a profession will be judged by the people in it. This matter has never been of concern to this author, but it is often discussed in library professional newsletters. There may be some library schools which can govern their intake. This was the case in Australia in the 1970s and 1980s, when it was possible to interview potential students before accepting them. It may be possible to do this in other countries. But as Flowers also asks, is there a danger of typecasting a profession if we do not, at best, randomly choose those who wish to enter into it? Random choice in the Australian context is based on entry scores and a preparedness to pay at the undergraduate level, and academic eligibility and the ability to pay at the postgraduate level. Yet the profession in Australia continues to attract middle-aged females in great numbers.

Is there a role for research in LIS professional education?

There are other factors at play in the equation, not least of which is the need to further intellectual enquiry in matters of information studies and science; something best done at universities though severely compromised by the practice-based professional orientation of librarianship. The IFLA (2000: 2) guidelines mention 'Research, Analysis and Interpretation of Information' as a core curriculum element, and that for academic staff teaching at the professional level 'a sustained record of scholarship is expected comparable to that expected of university teachers in other disciplines' (ibid.: 3). The CILIP (2005) documentation specifically mentions a prime concern with course relevance in an applications environment providing generic and transferable skills, rather than purely academic issues. The ALA (ALA Committee on Accreditation, 2006) documentation recommends consultancies so that academics in the field stay in touch with practice.

Smith and Harvey (2006) contemplated the role of professional associations in fostering a research culture among members, emphasising the Australian context. They reported evidence of some associations realising that research and the research process need to be better recognised, particularly as library professionals are increasingly undertaking higher-level qualifications which include a research component. Yet a research qualification is not always necessary for recognition as a professional librarian, so the question needs to be asked: why should librarians bother to undertake the research rigours and intellectual endeavour to achieve it? There is, for example, the clear expectation by Australian universities that any library professional hoping to enter an academic career should either possess or be well on the way to completing a PhD. Changes to the funding of university research are currently under way in Australia, with the establishment of the research quality framework (RQF) and new methods of assessing research undertaken being developed by the federal government (DEST, 2007b). If LIS professional education is to remain at the university level then the educators themselves need to consider their position in the broader Australian research agenda carefully, particularly as many universities are striving to be included as 'teaching and research' universities, if not in the 'research only' category proposed. The final category of becoming a 'teaching only' university is also possible, but not favouored by some of the remaining universities in which LIS education is currently offered.

Former ALIA president Gillian Hallam (2005: 4), herself an LIS educator, noted in a 'Frontline' column in *inCite* that:

> it can be strongly argued that research is critical for the creation of professional knowledge and therefore critical to the survival and growth of the library and information profession. Without a commitment to research, we will not be a profession as such, but merely an occupation that focuses on routine processes.
>
> LIS educators have a responsibility to ensure graduates are equipped not only with the conceptual structures and thinking processes of their discipline, but also with an understanding of and experience in the range of research methodologies that can be applied in practice.

Perhaps significantly, nowhere in her column does Hallam suggest that the professional association, ALIA, has a role in ensuring that research is firmly placed in the curriculum of first professional qualifications; rather, the responsibility lies with librarianship educators. Is there enough interest in the profession to seek recognition of research not only as a coursework subject but also as a demonstrated practice through research project work?

The recent establishment of a research fund capability within ALIA has meant that, in order to secure taxation concessions, ALIA needed to set up a committee of researchers to administer requests seeking to access this money. So the ALIA Research Committee was born. Interestingly, fund management is only a small part of the committee's business: its discussions range far and wide on research matters in LIS. It is to be hoped that ventures like the ALIA Research Committee and the initiatives arising from its deliberations will move the profession in Australia, even ever so slowly, towards the recognition that a research culture is an important component of professional presence and continuation.

Both CILIP and the ALA have research committees. The Library and Information Research Group is a CILIP special-interest group 'formed in 1977 to bring together those interested in library and information research'; it 'promotes the value of information research and links research with practice' (CILIP, 2007). The ALA has a long-standing interest group in research, the Library Research Round Table:

> The Library Research Round Table (LRRT) was founded in 1968 to contribute toward the extension and improvement of library

> research; to provide public program opportunities for describing and evaluating library research projects and for disseminating their findings; to inform and educate ALA members concerning research techniques and their usefulness in obtaining information with which to reach administrative decisions and solve problems; and expand the theoretical base of the field. (ALA, 2007)

If the practical nature of the profession overrules other scholastic achievement, an underlying outcome will be that courses in library studies will eventually lose their place at the university campus, at least in Australia, since it would be argued that there are other institutions where trainees can learn library practice.

What is accreditation worth?

In basing his model of recognition/accreditation on readiness for professional practice, Parr (1991: 109) states:

> when the Association [the LAA] admits a graduate from a recognised school to professional membership it is in effect assuring the community that it has satisfied itself as to that person's professional competence. Of course, that is part of the fiction I referred to... The Association has no way of judging his or her professional competence in the field, it knows only that the applicant has met certain academic criteria.

Is this what the recognition/accreditation process is all about? If so then in order to assure the Australian library community that a graduate from a library school programme was ready for professional practice, ALIA would need to take further steps in its recognition procedures.

Is it time to ask some hard questions.

- How do we measure a true profession of librarianship?
- How do we encourage a fruitful nexus between LIS research scholarship and practice?
- What is the role of a professional library association in the library education process?
- How might an association demonstrate its responsibility for standards of entry to a profession?

- If an association adopts an interest in the education of its future professionals, should that association leave it to the relevant educational institutions to manage educational standards for professional preparation?
- Should that association monitor or inspect courses?
- Should reaccreditation be regarded as merely a formality if certain standards are met?
- Should the emphasis be on practical preparation?
- Should there be a recognition of the need to push the intellectual rigour of the discipline?
- If there is a board to govern these matters, should its members be elected or appointed using relevant criteria?
- Given the politics of education today, should associations demonstrate more awareness of these situations, and how should they do this?
- Are the size and number of LIS schools in a country an issue (see Pawley et al., 2001; Hallam, 2007)?

Parr asked other questions in 1991.

- Have the library schools delivered on the contract?
- Are they producing graduates capable of performing as professionals without further training or experience in the field?
- Do/should library schools increasingly react to their educational milieu rather than the professional body?

In 1979 Flowers requested that the nexus between academic qualification and initial and continuing membership be resolved. Has this happened?

Conclusion

Many wiser professionals have gone before the author in discussing the pros and cons of accrediting library programmes. Yet in earlier times in Australia, the stakes were different. Professional associations operated at a time of professional belief and focus, when university education was more stable. They were indeed the 'heady days' of which Flowers (1979) writes.

Today there are a number of issues at play in the complex relationship between LIS professional associations and education for future LIS professionals, particularly in the Australian context. It would be most helpful if our professional purpose was more focused and we regained pride in our professional turf. Instability is a sign of today: instability in the role of the profession, its association(s) and the education for it. How we decide to handle all of these matters and the shifting political nuances that surround LIS education will be a challenge to us all. The accreditation processes outlined in this chapter are based on a serious commitment to education for the profession they serve. This high regard that the profession demonstrates towards the education of its future members is a very important component in a very political process.

Acknowledgements

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Notes

1. New name for the Library Association of Australia (LAA), adopted in 1989.
2. This issue is a paper in itself. As an example of the 'scholarliness' of the information studies literature, as of October 2007 there were 53 titles listed in the journal citation reports, social science edition, journal summary list on the ISI (2006) *Web of Knowledge*.
3. The new professional body in the UK formed by the unification of the Institute of Information Scientists (IIS) and the Library Association (LA).
4. Parr (1991: 104) mentions that, at the time of his paper, 'formerly prestigious schools have failed ALA re-accreditation as parent universities decline to provide the resources to meet standards'.
5. In outlining some of the political factors, the author has drawn heavily on her own experiences in the knowledge that, as discussed with international colleagues in library education, situations are similar in a number of countries.
6. In 1988 the then federal Minister for Education, John Dawkins, instigated major structural reform of the Australian university system, abolishing the tripartite structure of universities, institutes and colleges and establishing a 'unified national system' of only universities. This reform included a restructuring of the fee structure for university education (Pawley et al., 2001).
7. This situation is Australia-wide (see Pawley et al., 2001).
8. Dare I say, 'sexy'?

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