



Report on the activities in 2015 within the framework of UNESCO category II centre operation

I. Introduction

Based on the reputation it has gained in a prolonged period of time in the area of librarianship and in the academic sphere in the regional geographic territory of South-eastern Europe, IZUM is known as a renowned regional centre for the development of library information systems and current research evaluation systems within the region. With its professional and innovative initiatives, IZUM has been present in the region for almost three decades and has managed to gain a large amount of trust.

COBISS (Co-operative Online Bibliographic System and Services) is a reference model of a system representing the platform for the national library information systems and current research information systems in Slovenia, Serbia, Macedonia, Bosnia and Herzegovina, Montenegro, Bulgaria and Albania, and also in preparation in Kosovo. The regional COBISS.Net network interconnecting all of these is a practical example of complementary synergies, without which we cannot imagine a modern education and research system or cultural, technological and economic development. Libraries cannot take on their role if their work is not supported by modern information communication technology. Neither are they able to function efficiently as isolated islands, so they must link with each other and provide conditions for dialogue and collaboration as one of the best bases for the development of each country and the international community as a whole.

IZUM provides the libraries within the region with:

- Proven organisational solutions and COBISS software for the automation of library functions with shared cataloguing within the COBISS.Net network with user interfaces in several languages (Slovenian, Serbian, Bosnian, Macedonian, Bulgarian and Albanian).
- Proven methodology and software to manage researchers' bibliographies within the COBISS system, applications for setting up a national research information system (SICRIS, E-CRIS), and evaluation of research results.
- A variety of training programmes (for librarians and IT professionals), the organisation of specialised workshops and the international COBISS conference.
- Server capacities for COBISS, SICRIS and E-CRIS applications and services.
- Support in the acquisition of financial resources for development activities (international development cooperation).

The long-term objective is to link and connect all higher education and research organizations as well as academic, special and public libraries in target countries into the COBISS.Net network and establish compatible systems for the evaluation of research activity.

We recognise the following necessary steps:

- Motivate competent ministries and public authorities, research and educational organisations as well as libraries to recognise and accept the concept of national systems, linked into the COBISS.Net network.
- Qualify the national COBISS Centres and national E-CRIS Centres as well as libraries for the implementation of organisational solutions and the COBISS/E-CRIS software.
- Co-finance the development of the national COBISS and E-CRIS systems (library equipment, staff training, managing researchers' bibliographies) until the satisfactory establishment of the said systems in the target countries

II. Activities and tasks within the COBISS.Net project

II.1 Summary

In 2015, 22 new libraries joined COBISS.Net in total, no library left COBISS.Net.

	Installation of the COBISS3/Loan software module	Transition from COBISS2/Loan to COBISS3/Loan	New libraries
COBISS.AL ¹			4
COBISS.BG			1
COBISS.BH	4	1	
COBISS.CG		2	1
COBISS.MK	5	1	
COBISS.SR	10		9
COBISS.RS	1		7
TOTAL	20	4	22

Summary of three criteria by individual systems outside Slovenia

Some important milestones within the COBISS.Net network in 2015 were also:

- the establishment of the Training portal in COBISS.AL,
- the completion of the project of the transition of libraries to the COBISS3/Holdings software module in COBISS.BH, and,
- the establishment of a Central Register of Users in COBISS.MK.

¹ See explanation of acronyms in Appendix.

In 2015, two agreements on the implementation of the COBISS system expired, namely in Serbia and Macedonia. In Serbia, a new agreement was signed (for the duration of one year), while in Macedonia, an annex was concluded for the duration of five years.

The COBISS.AL, COBISS.BG, COBISS.RS and COBISS.CG systems do not have their own computer capacities to maintain their own national and local catalogues and databases, nor do they have the capacity to run the COBISS applications and services. For this purpose, they use the hosting system of IZUM's server infrastructure.

II.2 Development aid

In 2015, with the expected financial aid of (mostly) the competent ministries, but also other subjects of the Republic of Slovenia and international organisations, all planned IZUM's activities in the role of UNESCO's regional centre, could be listed in ten different topical areas:

1. Co-financing the purchase of equipment and the installation arrangement in the national COBISS centres
2. Translating COBISS user interfaces, user manuals and other documentation
3. Training COBISS application instructors
4. Co-financing the purchase of equipment and the installation arrangement in libraries
5. Co-financing the post-graduate librarianship study programme at the University of Shkoder
6. Training COBISS application users
7. Co-financing the conversion of local databases (catalogues) from other systems
8. Co-financing the creation of bibliographic records for the purposes of researchers' bibliographies
9. Conference participation – covering travel expenses for conference participants
10. Planning, coordinating, advising and promotional activities

In line with the financial capacities and absorption abilities some of topics were more prominent, some less, and some not at all. Because of the lack of expected financial resources the activity range has been much lower.

With regards to points 1, 4, 7, 8 and 9, nothing was done. Only points 2 (translating), 3 (instructor training) and 6 (COBISS users training) were carried out satisfactorily. With regards to point 5: it came to a halt in 2013 and despite our optimism and great motivation nothing improved in 2015. We expected a real push from EU programs and UNESCO regarding the postgraduate part-time study of librarianship (second Bologna cycle) activities, but there were obviously no chances or opportunities.

As part of point 2 (translating COBISS user interfaces, user manuals and other documentation), work was underway on translations of updates of all current user manuals into Albanian, Serbian and English and editing was carried out for all currently translated existing courses. Also in the process of translation were materials for new courses, which include the course transparencies and all other documentation, required for conducting a

course (questionnaires, signatory lists, etc.). The entire text required for the mCOBISS application was translated into Serbian and Bosnian.

As part of point 3 (instructor training), IZUM conducted two courses for future course instructors in Bulgaria, and one course in Bosnia and Herzegovina and the Republic of Srpska respectively (carried out twice each) as well as two courses in Montenegro, one of which was repeated once. In Albania, instructor training was carried out differently; there was one-on-one training for local instructors for further courses.

As part of point 6 (training COBISS application instructors), courses are generally conducted following our training programme and course materials by specially trained instructors in the National COBISS Centres (NCC) with the help and under the guidance of IZUM as part of the regular training activities following IZUM's annual work programme. The only exception is Albania, where at this moment there are not enough trained instructors yet, so IZUM's involvement is larger and the training takes place as part of our international development aid programme.

In addition to conducting the courses from the regular programme, IZUM, as part of the training of future cataloguers in Albania, also very actively performed the training processes for acquiring the required permits (*licences*) for working within the COBISS system (creating and validating test records, exams, etc.). The participants of the courses, related to cataloguing, once they completed the courses, continued the training process by creating their own records in test environments, which were then checked and validated by the "examiners". Checking test records for monographs, continuing resources and component parts is very demanding and was very time consuming for IZUM's employees. In 2015, there were nine exam dates (to acquire permits A, B1 and B2), 28 candidates took the exams and only 4 of them failed. This means that 24 new permits were awarded, which means that there are 51 certified cataloguers with the required permits for creating new records in Albania.

In addition to training, targeted activities for the inclusion of Albanian libraries in the COBISS system were also taking place. Before the actual implementation of a library, the actual situation in the library is recorded. Once the holdings minutes are signed, the library firstly joins COLIB (shared portal with library data); while a custom training programme for the library is created. At the end of 2015, the number of Albanian libraries that joined the system stopped at 29 (four new ones this year).

New libraries also joined in Montenegro (1), Bulgaria (1), Serbia (9) and the Republic of Srpska (7). The total number of libraries outside Slovenia, participating in the COBISS.Net network, was 337 on the last day of the previous year.

II.3 Additional (regular) activities

In addition to the abovementioned tasks that are part of the international development aid programme, the following activities were carried out as part of the regular, horizontal, maintenance, infrastructure and additional tasks:

- Albania: At the end of 2015, the Training portal was established. In addition to that 7 different COBISS courses were conducted for 101 participants, once each, with the exception of the course *Cataloguing electronic resources and bibliography management* that was carried out three times.

- Bulgaria: Work was continued on the project for establishing authority control for personal names in COBISS.BG. Training was conducted for a course instructor for the course *COBISS3/Cataloguing with authority control* and the course *Use of COBISS3/Cataloguing software – updating CONOR*. The abovementioned courses were then also conducted for all the employees of the St. St. Cyril and Methodius National Library of Bulgaria. The Regional Library 'Dora Gabe' in Dobrič started working actively in the COBISS.BG system. Prior to that, the NCC organised all the required training for this library. Talks have also begun about the conversion of data from the software used previously for this library.
- Bosnia and Herzegovina: In 2015, all libraries within the COBISS.BH system switched to using the COBISS3/Holdings software module; this project is now completed. The course *Transition to COBISS3/Cataloguing* was carried out twice; in parallel, a competent course instructor was also trained. Libraries were actively included in the COBISS3/Loan software module; transitions from the COBISS2/Loan software module to the COBISS3/Loan software module began. The mCOBISS application was introduced.
- Montenegro: The following courses were held: *Use of COBISS3/Holdings software* (twice) and *Transition to COBISS3/Cataloguing* (once). In 2015, 22 libraries began working in the COBISS3/Cataloguing software module, and two libraries transitioned from the COBISS2/Loan software module to the COBISS3/Loan software module.
- Macedonia: The Central Register of Users (CRU) was established in the beginning of 2015. No courses from the regular COBISS training programme were held. In the COBISS.MK system, five libraries started working directly with the COBISS3/Loan software module; the transition between COBISS2/Loan and COBISS3/Loan was arranged for one library.
- Republic of Srpska: At the end of 2015, there were 15 full members (7 of them were included in 2015) in the youngest member country in the COBISS.Net network. The course *Use of COBISS3/Cataloguing software – Beginner's* was held twice for 21 participants. In 2015, the *National and University Library of the Republic of Srpska (NUBRS)* was the first library to start working with the COBISS3/Loan software module. In 2015, a local course instructor was trained so they can now independently conduct the course *Use of COBISS3/Cataloguing software – Beginner's*.
- Serbia: In 2015, 6 different courses from the regular COBISS training programme were held. 516 participants took part in 35 courses in the total duration of 90 days. Two thirds of all courses were dedicated to the transition to COBISS3/Cataloguing. Due to the extensive training, all members of the COBISS.SR system started working in the COBISS3/Cataloguing software module in 2015; 166 libraries in total (145 switched to COBISS3/Cataloguing in 2015). The transition to the third generation platform is now complete in Serbia. Another ten libraries started using the COBISS3/Loan software module in 2015; one new course instructor was trained.

In 2015, we finished establishing authority control for personal names in Bulgaria. The software supports the model of records with parallel forms of personal names in Latin and Cyrillic script. It is also suitable for other countries that use Cyrillic script. In Serbia they are also currently preparing to switch to authority control for personal names; the authority database is being edited.

The procedure for transitioning to *COBISS3/Cataloguing* was handed over in all countries within COBISS.Net. In Serbia and Montenegro, the transition is complete, whereas in Bosnia and Herzegovina and in Macedonia cataloguers have started their training. The other systems – in Bulgaria, Albania and the Republic of Srpska – have been using COBISS3/Cataloguing since the establishment of their respective systems.

In 2015, focused activities began in COBISS.Net for either the direct inclusion in the COBISS3/Loan software module or the transition from COBISS2 to COBISS3. In the COBISS.Net member countries, 20 installations of the COBISS3/Loan software module were performed as well as four transitions from COBISS2/Loan to COBISS3/Loan.

II.4 Active event participation

We were again invited by OCLC/EMEA to their internal conference in Leiden (The Netherlands) as they consider us an important factor in the geographic area of South-Eastern Europe and would like to intensify our cooperation. We had the opportunity of direct discussions with the individual performers of technical and developmental operations, in which we could explain to them our dilemmas, present our proposals and demonstrate our actual work.

The Slovenian National Commission for UNESCO, UNESCO Office and the University of Primorska organised a one-day UNESCO forum in October, to which IZUM was also invited. The main purpose of the event was for all the stakeholders operating as part of UNESCO's programmes in Slovenia to meet, get to know each other, exchange experiences and share them with the public. IZUM was invited to present its role of a UNESCO category II centre along with presentations by other UNESCO chairs, networks, youth platforms and national committees of non-governmental and international UNESCO programmes as part of the topic on education, research and international projects. The organiser published special proceedings; IZUM contributed the article entitled *IZUM in the role of UNESCO regional centre*.

The organisers of the XII WESTERN BALKAN INFORMATION LITERACY CONFERENCE in Bosnia and Herzegovina invited us to actively participate at their conference as a part of the session entitled *Digital citizenship for a digital age*. IZUM's contribution with the title *The mCOBISS project as a best-practice example of fulfilling the goals of the EU's digital agenda* was very well received.

Unfortunately, we were not invited to any UNESCO events related to the region of South-eastern Europe.

III. Development (sub)projects

R30 – Introducing the COBISS3/Cataloguing software module to COBISS.Net

In 2014, the *COBISS3/Cataloguing* software module was introduced to COBISS.Net. The COBISS3/Cataloguing software module was updated with a procedure for converting scripts in the fields for authors when the record is downloaded from the shared database. The next step was the training for instructors for the courses *Transition to COBISS3/Cataloguing*.

The instructor training in Serbia and Montenegro was already completed in 2014. Later on, we also trained instructor from other countries. They now conduct the courses for transitioning to the *COBISS3/Cataloguing* software module independently. The National COBISS Centres (NCC) also independently perform the transition procedure that was handed over to them for their libraries.

Until the end of 2015, all the libraries in Serbia and Montenegro stopped using *COBISS2/Cataloguing* and started using *COBISS3/Cataloguing*. In Bulgaria, the Republic of Srpska and Albania, the transition was not required as they started using COBISS3 directly when their systems were established. In 2016, the transition must also be completed in Macedonia and COBISS.BH.

A protocol has been established for the communication between NCC and the user services at IZUM to ensure that a large number of test and production environments for COBISS3 are available and work without interruptions. The communication with cataloguers regarding the test records and granting privileges takes place at the NCC. From the developmental point of view, this task has been completed.

R31 – Uploading records from COBISS.Net to WorldCat

Due to the various types of Cyrillic scripts, talks are required about transcription protocols for the download and upload of records between all the involved parties (OCLC, IZUM, Serbia, Montenegro). Negotiations have been underway but we have not found a satisfactory solution yet. In addition to the technical rules for transcription, there are also unresolved issues regarding priority records in the case of identical material in different cataloguing environments. IZUM has already prepared its solutions but cannot implement them without the agreement of the other parties.

The task is ongoing and will be completed once all the involved parties come to a conclusion with regards to their proposals and provide the conditions for carrying out the agreed tasks.

R32 – Introducing the COBISS3/Acquisitions software module to COBISS.Net

In 2015, the introduction of and transition to the COBISS3/Loan software module continued. In 2015, four transitions from the COBISS2/Loan software module to the COBISS3/Loan software module were carried out within COBISS.Net (one in COBISS.BH, two in COBISS.CG and one in COBISS.MK) along with twenty direct installations of the COBISS3/Loan software module. There are still 53 libraries within the COBISS.Net network that work with COBISS2/Loan. Due to the large workload and preoccupation with other

tasks, most COBISS centres did not dedicate as much time as planned on this task (e.g. the course *Use of COBISS3/Loan software* was only carried out twice in COBISS.SR and not at all in the other countries in 2015). This task will therefore be continued in 2016, when we will continue with the required activities: train instructors for conducting courses in COBISS.BG, COBISS.CG and COBISS.SR, in cooperation with the NCCs, define the procedure of the transition to COBISS3/Loan (where this has not been done yet) and hand over all the accompanying documentation and other materials as well as cooperate and provide help during the transition.

IV. Activities for the acquisition of European funds

In May 2015, IZUM sent a letter to the European Commissioner for Education and Culture. The letter was sent to Commissioner Navracic by Milan Zver, the Slovenian MEP, with his personal recommendation. In mid-June, DG Education and Culture informed us that the COBISS.Net project might be financed by DG Neighbourhood and Enlargement Negotiations. In that case, only those countries of the Western Balkans that are getting ready to be integrated in the EU would be eligible for financial aid.

The first opportunity to discuss the financing of the COBISS.Net project with DG NEAR funds was the 4th Ministerial Meeting of the Western Balkans Platform on Education and Training (Vlorë, Albania, 2–3 July 2015). The condition was, however, that at least one of the Ministers of Education officially proposes the financing of the project and the others endorse the proposal. For this purpose, we prepared a proposal and sent it to all Ministers of Education in the target countries. We also informed the directors of the national libraries and proposed to them to exert their influence with their ministers for the proposition and support of the project. Some ministers told us prior to the meeting that they will endorse the project but they want someone else to officially propose.

Unfortunately, none of the ministers in Vlore proposed the financing of the COBISS.Net project by DG NEAR, so there was no discussion on the matter.

After the meeting, the representative of DG EAC informed us that the next opportunity to reach an agreement on the COBISS.Net project funding will be at the Western Balkans Summit in Vienna on August 27. We lobbied on all sides so that Slovenia would propose the financing of the COBISS.Net project from the European funds at the Western Balkans Summit in Vienna. There was a mutual agreement between the Slovenian Minister of Economic Development and Technology and the Austrian Minister of Science, Research and Economy of proposing (Slovenia) and supporting (Austria) the project. However, the COBISS.Net project was not mentioned at all.

When the second chance for political agreement on financing the COBISS.Net project from European funds was missed, we asked DG NEAR what they think about UNESCO offering a memorandum of understanding to the target countries to sign. According to their answer, it would be very beneficially if UNESCO could coordinate these efforts, as UNESCO could provide a regional platform, which is needed for financing the project on multi-country level.

We informed the UNESCO directly and representative of the Slovenian UNESCO Office of these facts but nothing happened.

V. **Statistics**

The following section is bringing up some statistics and graphs representing results and achievements of IZUM's work in the region in 2015. Slovenian libraries and their data are excluded (except in the bibliographic records cross-reference tables).

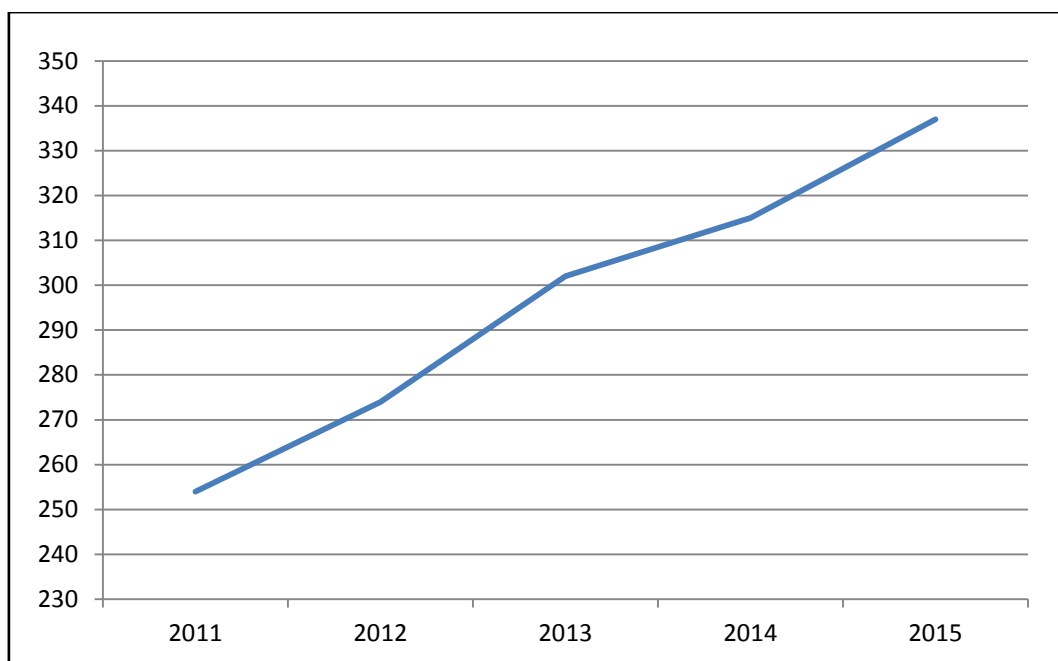


Fig. 1: COBISS.Net Libraries Growth (total)

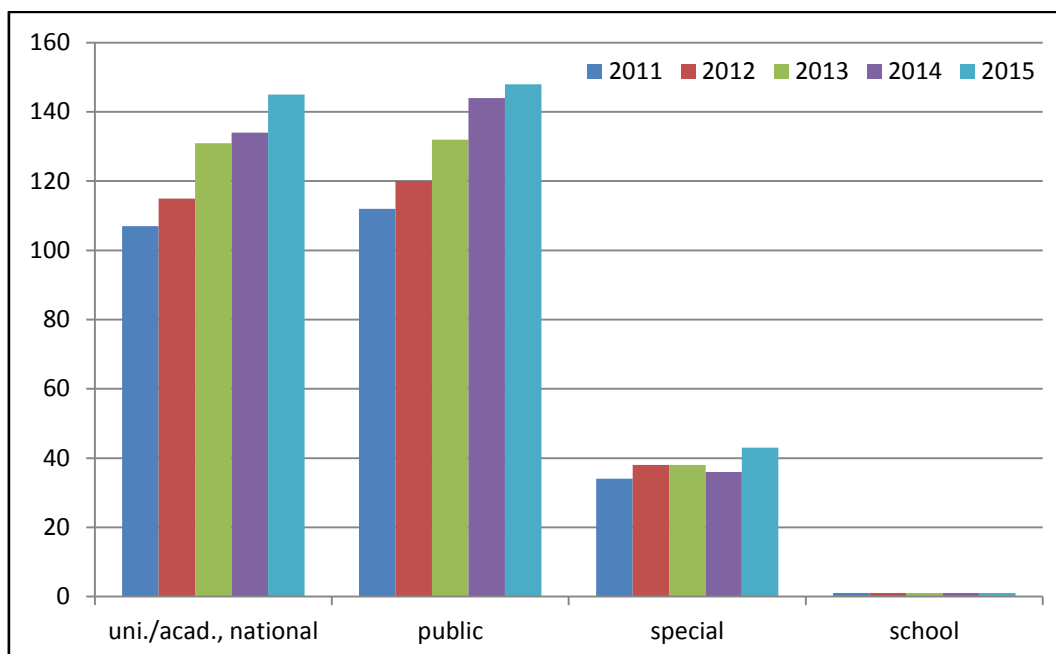


Fig. 2: COBISS.Net Libraries (per library type)

Union catalogues COBIB bibliographic records - 31 December 2015									
	COBIB.SI	COBIB.SR	COBIB.MK	COBIB.CG	COBIB.BH	COBIB.BG	COBIB.AL	COBIB.RS	Total
Monographs	2.755.368	1.917.602	413.429	298.991	395.406	498.264	78.553	93.503	6.451.116
Comp. parts	430.016	134.168	27.230	9.480	992	31	373	289	602.579
Serials	130.689	72.424	11.719	3.533	8.056	39.924	2.377	209	268.931
Articles	1.280.659	782.058	118.599	80.946	15.200	429.137	8.130	6.947	2.721.676
Perf. works	125.420	2.405	350	158	319	0	55	0	128.707
Other	7.934	3.938	249	0	488	2	35	2	12.648
Total	4.730.086	2.912.595	571.576	393.108	420.461	967.358	89.523	100.950	10.185.657
w/ RSR code	1.526.383	178.451	4.275	19.801	13.088	0	873	290	1.743.161

Fig. 3: Union catalogues COBIB bibliographic records

Bibliographic records exchange from 1 January 2015 until 31 December 2015									
COBISS.Net	From COBIB.SI	From COBIB.SR	From COBIB.MK	From COBIB.CG	From COBIB.BH	From COBIB.BG	From COBIB.AL	From COBIB.RS	Total
COBISS.SI	0	1.042	254	238	266	10	14	34	1.858
COBISS.SR	3.927	0	866	956	1.056	294	14	950	8.063
COBISS.MK	1.168	2.628	0	95	59	118	0	0	4.068
COBISS.CG	1.096	9.997	459	0	1.027	8	4	127	12.718
COBISS.BH	954	1.792	71	99	0	5	0	0	2.921
COBISS.BG	31	35	81	16	6	0	0	3	172
COBISS.AL	18	7	5	6	3	0	0	0	39
COBISS.RS	357	14.337	705	3.244	2.191	5	0	0	20.839
Total	7.551	29.838	2.441	4.654	4.608	440	32	1.114	50.678

Fig. 4: Bibliographic records exchange

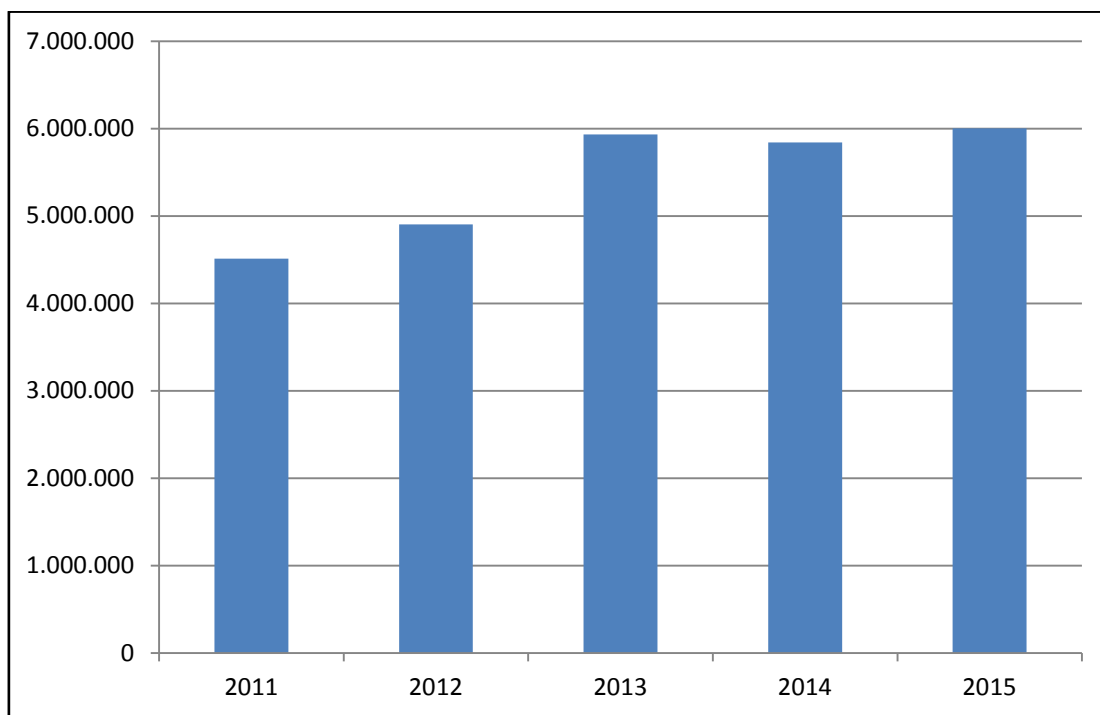


Fig. 5: Searching in union and local catalogues

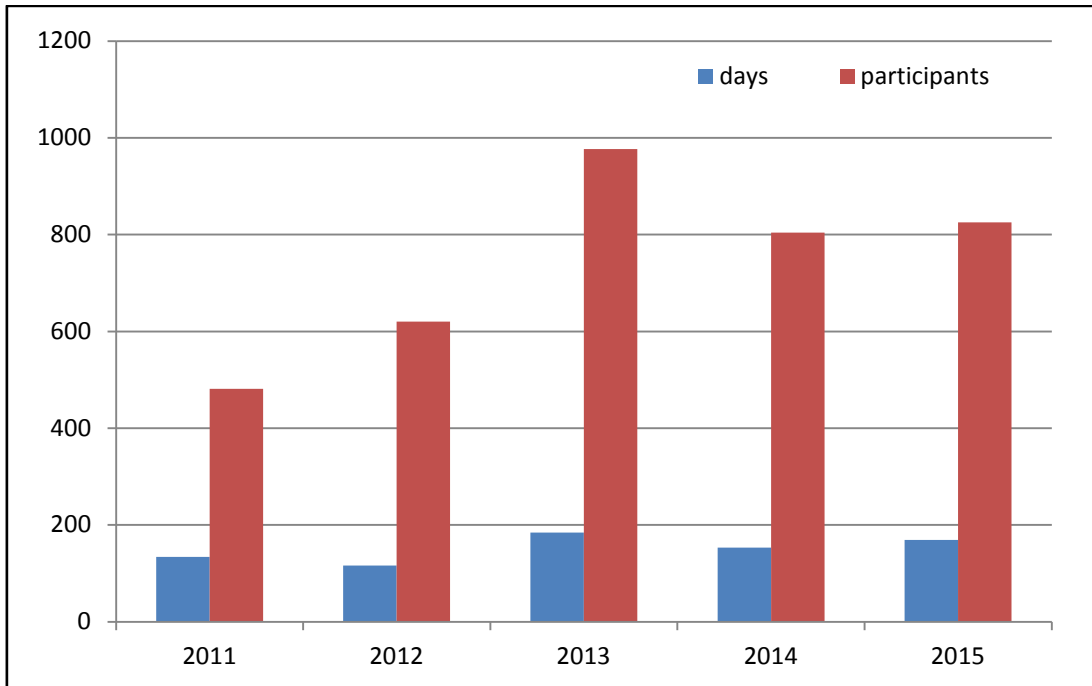


Fig. 6: Training and seminars

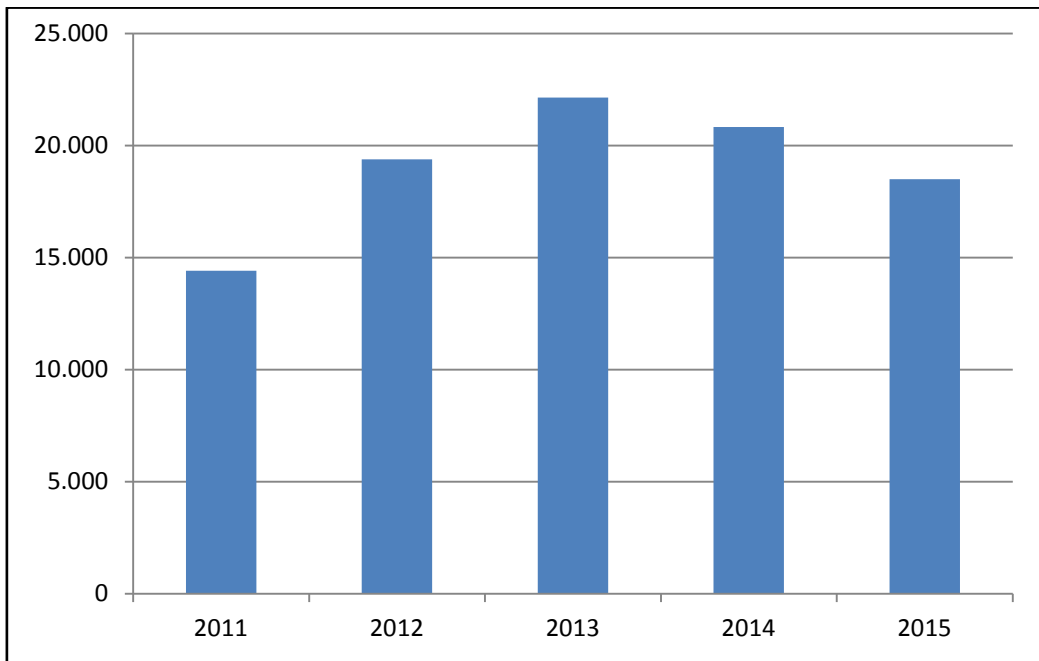


Fig. 7: Web bibliographies' printing

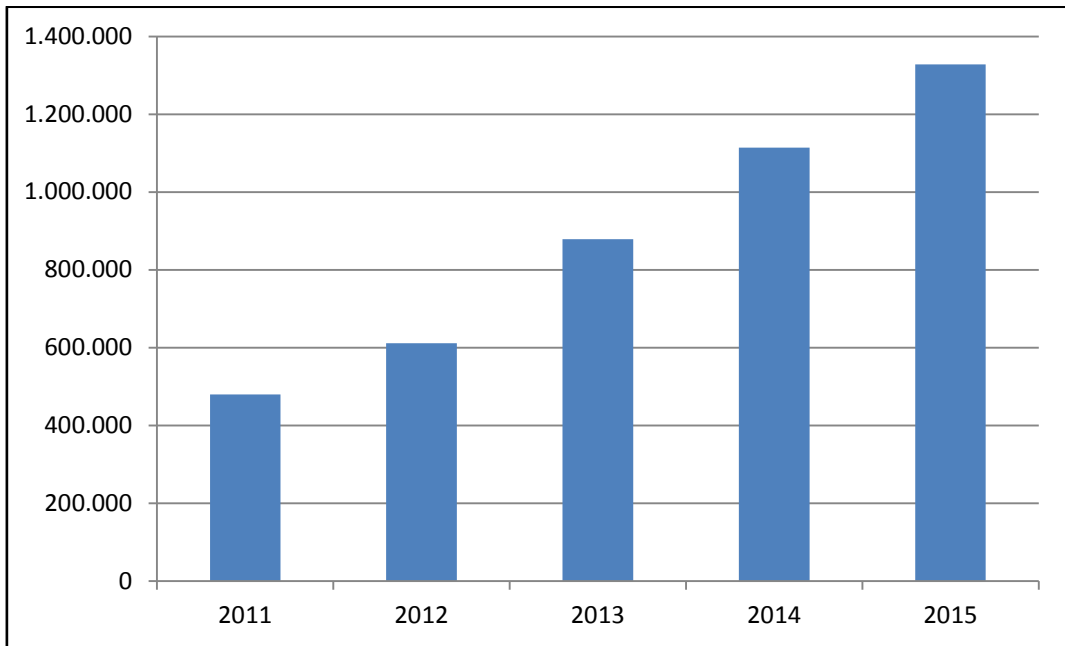


Fig. 8: Loan/Circulation (total)

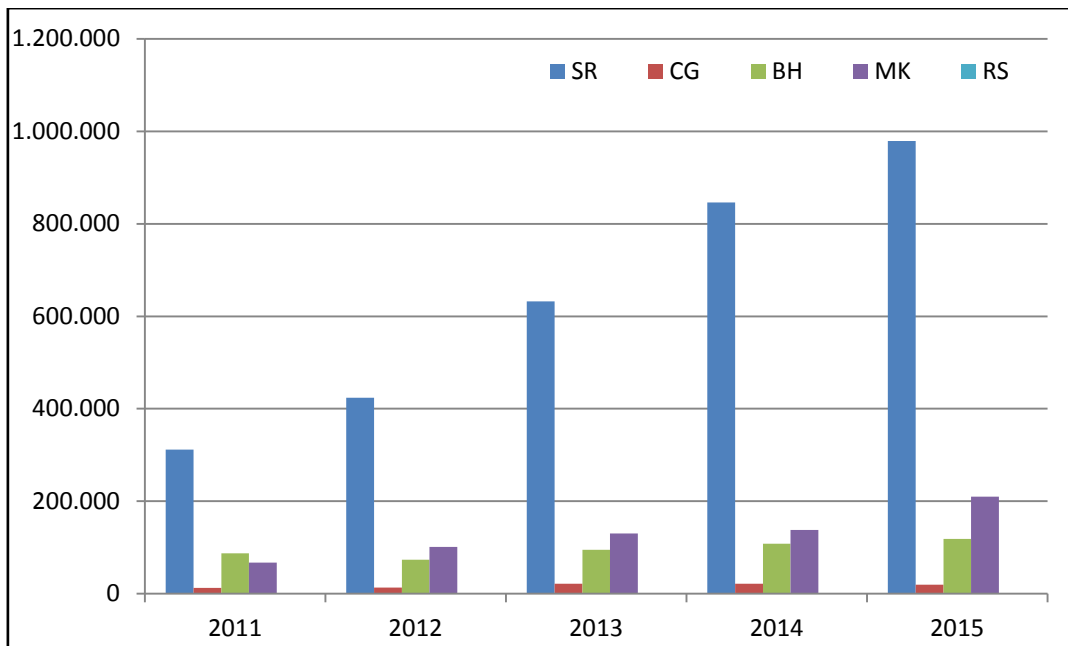


Fig. 9: Loan/Circulation (per country)

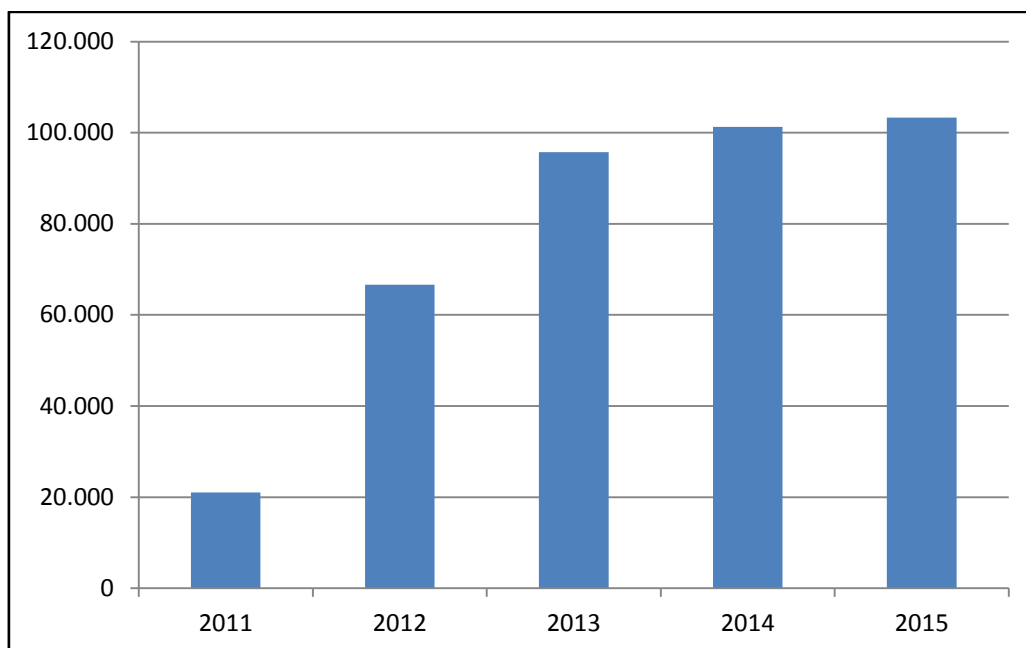


Fig. 10: Loan renewals and reservation – via COBISS/OPAC

VI. Conclusion

With relatively humble means we successfully strengthened the trust in Slovenian information technologies throughout the South-eastern European region, and even achieved a successful breakthrough in Albania. To this day, there were no additional financial support for this purpose and under such conditions it is difficult to compete on par with the efforts of the governments of other European countries, who, systematically via intergovernmental diplomacy and international agreements and various developmental aid programmes, strive to gain the trust and affection of the Western Balkan countries to use the technology they have to offer. Thus, we were forced to slow down several planned activities.

Maribor, 22 April 2016

Davor Šoštarič

Appendix

Two-letter designations are used to indicate the autonomous COBISS and E-CRIS systems within COBISS.Net as well as their individual component parts (e.g. catalogues and databases):

.SI	Slovenia
.AL	Albania
.BG	Bulgaria
.BH	Bosnia and Herzegovina
.CG	Montenegro
.MK	Macedonia
.RS	Republic of Srpska
.SR	Serbia