



Report on the activities in 2016 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 connect 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 in 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 2016, 11 new libraries joined COBISS.Net in total, ten in Serbia and one in Bulgaria. Three libraries left (one each from Bulgaria, Serbia and Macedonia). The total number of libraries outside Slovenia included in the COBISS.Net network was 345 on the last day of the previous year.

	Installation of the COBISS3/Loan software module	Transition from COBISS2/Loan to COBISS3/Loan	New libraries
COBISS.AL ¹			
COBISS.BG			1
COBISS.BH	5	5	
COBISS.CG	4	3	
COBISS.MK	2	1	
COBISS.SR	38	12	10
COBISS.RS			
TOTAL	49	21	11

Summary of all three criteria by individual systems outside Slovenia

Some important milestones within the COBISS.Net network in 2016 were also:

- All libraries in Montenegro now work with the COBISS3/Loan software module.
- All countries except Macedonia use the COBISS3/Cataloguing software module.

¹ See explanation of acronyms in Appendix.

- The mCOBISS application was implemented in Bosnia and Herzegovina and Serbia.
- The Training portal was established in Bosnia and Herzegovina and Bulgaria.

In 2016, the agreement on the implementation of the COBISS system in Serbia expired and the new agreement was signed (for the duration of one year).

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 2016, 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 can be listed in ten different topical areas:

1. Co-financing the creation of bibliographic records for the purposes of researchers' bibliographies
2. Harmonising national library catalogues with the WorldCat global catalogue
3. Organising new national COBISS centres (help with providing the technical conditions, equipment and infrastructure)
4. Translating COBISS user interfaces, user manuals and other documentation
5. Training COBISS application instructors
6. Co-financing the purchase of equipment and the installation arrangement in libraries
7. Training librarians for COBISS
8. Co-financing the purchase of equipment and the installation arrangement in the national COBISS centres
9. Co-financing the post-graduate librarianship study programme at the University of Shkoder
10. Organising specialised information centres
11. Co-financing the access to selected international information resources
12. Co-financing the conversion of local databases (catalogues) from other systems
13. Participation at the international COBISS conference – covering travel expenses for selected participants
14. Planning, coordinating, advising and promotional activities

In line with the financial capacities and absorption abilities some of the 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.

Out of the activities listed above, only the following items were carried out to a satisfactory extent: 4 (translating), 5 (training instructors), 7 (training librarians for COBISS) and 13 (participation at the COBISS conference), partly also item 1 (for selected institutions in Albania) and 2 (analysis and preparation in Serbia and Montenegro). With regards to item 9, there has been a blockade since 2013 and despite our optimism and great deal of enthusiasm, nothing had improved in 2016.

Item 1 (co-financing the creation of bibliographic records) was only carried out in Albania. A special programme was prepared, intended for both libraries and individual cataloguers. Those libraries, whose cataloguers created at least 250 new bibliographic records per year in the last two years, received a financial incentive. 17 cataloguers from 14 libraries participated in the programme. Libraries spent one third of the received funds for their development, and directly rewarded the cataloguers with the remaining two thirds.

As part of item 4 (translating COBISS user interfaces and user manuals as well as 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.

Training activities for librarians (item 7) were quite varied. Ten different courses were carried out: COBISS3/Cataloguing (Basic), COBISS3/Cataloguing (Advanced), COBISS3/Cataloguing (updating CONOR), Cataloguing e-resources and maintaining personal bibliographies, COBISS3/Downloading records and holdings, COBISS3/Acquisitions (monographs), Transition to COBISS3/Cataloguing with authority control, Transition to COBISS3/Cataloguing, COBISS3/Holdings (Serials), COBISS3/Loan. These are courses from the regular COBISS training programme that were attended by 680 librarians in 57 repetitions and in the total length of 173 days.

Albania: 4 courses, 12 days total, 40 participants

Bulgaria: 9 courses, 26 days total, 89 participants

Bosnia and Herzegovina: 9 courses, 21 days total, 85 participants

Montenegro: 3 courses, 13 days total, 37 participants

Macedonia: 7 courses, 14 days total, 72 participants

Republic of Srpska: 2 courses, 6 days total, 31 participants

Serbia: 23 courses, 81 days total, 326 participants

In four countries, the procedure for acquiring permits (*licences*) for conducting individual COBISS courses was successfully completed in 2016 (item 5):

Bulgaria: one candidate for the COBISS3/Loan course

Macedonia: one candidate for the courses Transition to COBISS3/Cataloguing and COBISS3/Cataloguing (Basic) as well as one candidate for COBISS3/Cataloguing (Advanced)

Montenegro: one candidate for the course COBISS3/Cataloguing (Basic)

Republic of Srpska: one candidate for the course COBISS3/Cataloguing (Basic).

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 2016, there were six exam dates (to acquire permits A, B1 and B2). 21 new permits were awarded, which means that there are 62 certified cataloguers with the required permits for creating new records in Albania. In other countries IZUM does not actively participate in the training processes and exams any more as this has been in the domain of the individual national COBISS centres; IZUM only participates in the process in a consulting role.

Data on new awarded permits for creating new records (i.e. in 2016) per type² and country

	A	B1	B2	SER	C	D
Albania	1	11	9			
B & H	6					
Bulgaria	4	12	12		12	5
Montenegro	18	3	3	3	2	
Macedonia						
Rep. Srpska	29	1			1	
Serbia	65	32	41	41	20	2
Total	123	59	65	44	35	7

At the traditional biannual international conference COBISS 2016 we co-financed the accommodation and travel expenses for 127 participants from the COBISS.Net countries. The conference had 310 participants from 12 countries. The invited foreign speakers included well-renowned experts from Switzerland, UK, Austria, Denmark and The Netherlands. The

² See explanation of permit types in Appendix.

night before the conference we organised a dinner for the directors of the national libraries, during which we touched upon several topics related to our mutual cooperation.

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: In 2016, the last of the currently 29 included libraries acquired the cataloguing permit and started working in the *COBISS3/Cataloguing* software module. This software module is now used in all included libraries in Albania. We went on 11 visits to the libraries with the purpose of helping with their work or the aim of promoting the inclusion of new libraries (particularly the national library in Tirana).
- Bulgaria: The project of establishing authority control of personal names in COBISS.BG was completed. The library »*Nacionalen centr za informacija i dokumentacija / Centralna naučno-tehnička biblioteka*« in Sofia started working actively in the COBISS.BG system. Prior to that, the NCC carried out all the mandatory training for this library. Talks have begun about the inclusion of the COBISS3/Loan software module in the National library "Sv. sv. Kiril i Metodij". A new instructor was trained for this purpose. Work on the bibliography project continued. The Training portal was established.
- Bosnia and Herzegovina: In 2016 all libraries within the COBISS.BH system started using the COBISS3/Cataloguing software module, which means that this project is now completed. The transition from the COBISS2/Loan software module to the COBISS3/Loan software module also continued. The mCOBISS application was implemented – this was the first implementation of the application outside Slovenia. On this occasion, a promotional presentation was organised in Sarajevo. The Training portal was established. Preparations and instructor training were underway to hand over the courses *COBISS3/Cataloguing (Advanced)* and *Use of COBISS3/Loan*. Upon the organiser's invitation, we actively participated at two professional conferences: *Western Balkan Information Literacy Conference* and *Juni na Uni (June upon Una)*.
- Montenegro: In 2016 the project of migrating to COBISS3 was fully completed. At the same time, we performed all the necessary activities at the national library and one of the university libraries to start working with the *COBISS3/Acquisitions* software module that had not previously been used in any of the libraries in Montenegro.
- Macedonia: The course *Transition to COBISS3/Cataloguing* was handed over and was then carried out regularly so that all cataloguers were trained accordingly by the end of 2016. The migration to the COBISS3 platform was performed for two libraries.
- Republic of Srpska: At the end of 2016, the COBISS.RS system had 15 full members; all of their libraries use the *COBISS3/Cataloguing* and the *COBISS3/Holdings* software module, and one of them also the *COBISS3/Loan* software module.
- Serbia: After the successful completion of the project of transitioning to *COBISS3/Cataloguing* in 2015, work was underway in 2016 within the COBISS.SR system to actively start the migration of loan to the COBISS3 platform. The mCOBISS.SR application was installed (the second installation outside Slovenia),

which was also successfully promoted at four locations in October 2016. The database of e-publications (ELINKS) was implemented in Serbia, which was the first implementation of this database outside Slovenia. At the end of 2016, 20,333 records with links to three collections of e-documents of the National library of Serbia were entered into this database.

Albania is the only country within the COBISS.Net family where, despite almost 30 libraries being included in the system, the national library still refuses all cooperation. Despite our many visits and intense correspondence there is no progress in sight. The issue is quite concerning as the national library is unwilling to cooperate due to emotional and unrealistic reasons. IZUM is still willing to actively help but it is obvious that more convincing and diplomatic efforts will be required.

Kosovo is also one of our desired target countries. Five visits to various libraries, the university and the ministry were carried out. We have been hosting a librarian from Kosovo for three years now. She was employed with the intention to acquire the required education in Slovenia (second cycle Bologna Master's degree in librarianship), take all the courses from the COBISS training programme and pass the national professional librarianship exam.

The *COBISS.Net Council* was founded. It is composed of the directors of national libraries, heads of the National COBISS Centres and representatives of institutions performing E-CRIS activities. The COBISS.Net Council formally met for the first time at the founding session at the beginning of July 2016. The session was attended by 15 appointed members (or their authorised representatives) and five guests from Slovenia, Albania and Croatia. The second meeting was intended for November 2016 during the COBISS 2016 Conference; however, the meeting was postponed due to the absence of a larger number of members. An informal session was organised during the conference for those present.

II.4 Active event participation

We were invited by OCLC/EMEA to their regular annual European conference in Madrid (Spain) 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 organisers of the WESTERN BALKAN INFORMATION LITERACY CONFERENCE in Bosnia and Herzegovina invited us to actively participate at their conference as a part of the session entitled *Librarians as support to the lifelong learning process*. IZUM's contribution with the title *Online Learning in the COBISS.SI Community* was very well received.

In Bosnia and Herzegovina, we participated at the conference *Juni na Uni* (June upon Una). The contribution entitled »COBISS.BH – a best practice example« was very well received. In addition to IZUM's contribution, COBISS was also mentioned favourably in six other contributions by other speakers.

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

III. Development (sub)projects

R27 – Implementing the COBISS3/Loan software module in COBISS.Net

In 2016, we continued to implement the module and organise the migration to the *COBISS3/Loan* software module within COBISS.Net. 21 migrations from the *COBISS2/Loan* software module to the *COBISS3/Loan* software module were performed (five in COBISS.BH, two in COBISS.CG, one in COBISS.MK and 13 in COBISS.SR) as well as 28 direct installations of the *COBISS3/Loan* software module.

The implementation of this software module did not finish in December 2016 as initially planned. The development task will continue in 2017, when the following necessary activities will begin:

- training instructors for conducting courses in COBISS.BG, COBISS.RS, COBISS.BH and COBISS.SR,
- defining the procedures for migrating to *COBISS3/Loan* (where this has not been defined already) in cooperation with the NCCs,
- handing over all the accompanying documents and other material, and
- cooperating and helping with the migration.

IV. Activities for the acquisition of European funds

We hosted a senior officer from UNESCO's Communication and Information Sector (CI) and together we outlined a strategy for searching for suitable instruments to help the member countries within COBISS.Net. The visit was followed by intense correspondence and work on preparing special action documents.

Great efforts were made to place the COBISS.Net project on the agenda and the minutes of some international conferences and to prepare the environment for new or existing European programmes. Cooperation with UNESCO was strengthened and UNESCO continues to support us. Together with IZUM, UNESCO prepared the initial development project document entitled »*Fostering Knowledge Societies in the Western Balkan through Knowledge Integration: Development of national library information systems and their integration into a common educational, research and cultural area of the EU*« and is willing to hand it to the administrators of EU development instruments. The newly founded COBISS.Net Council confirmed the document. UNESCO made an effort to organize a formal joint meeting with the target country ambassadors on 13th July 2016. This meeting was participated by only two countries and failed to generate much required joint ownership of the beneficiary countries.

V. Statistics

The following section contains some statistics and graphs representing results and achievements of IZUM's work in the region in 2016. Slovenian libraries and their data are excluded (except in the bibliographic records cross-reference tables).

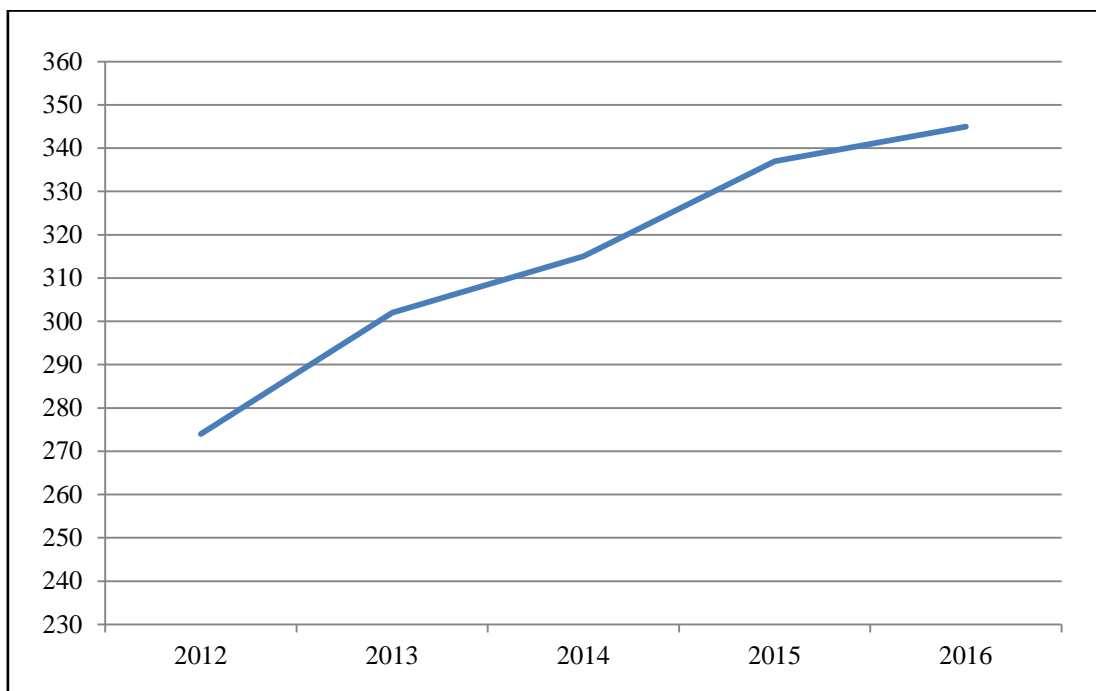


Fig. 1: COBISS.Net Libraries Growth (total)

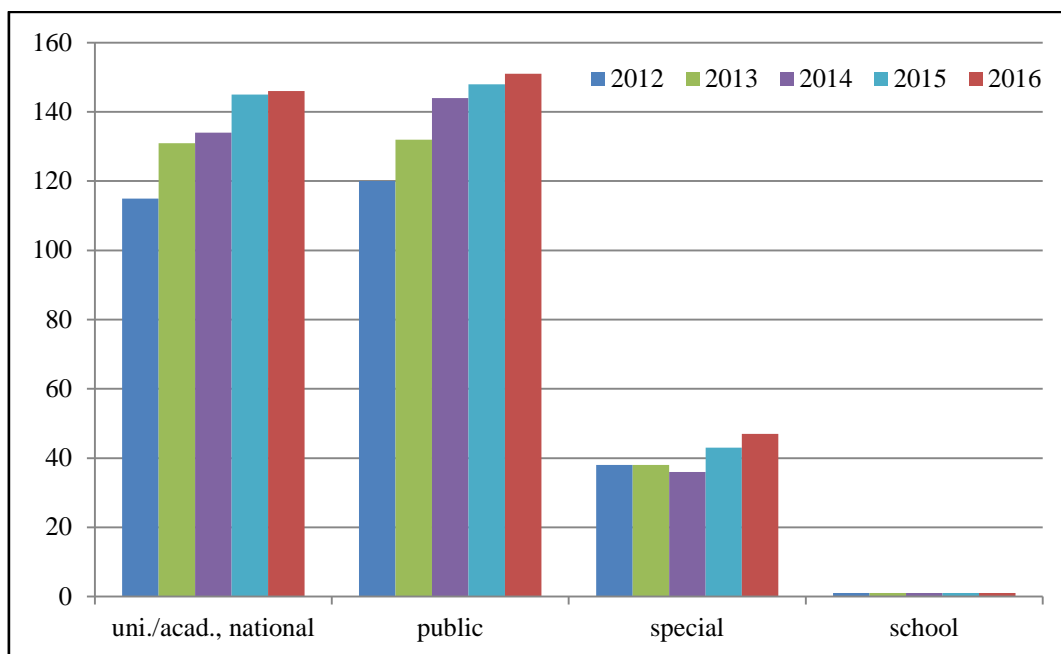


Fig. 2: COBISS.Net Libraries (per library type)

Union catalogues COBIB bibliographic records – 31 December 2016									
	COBIB.SI	COBIB.SR	COBIB.MK	COBIB.CG	COBIB.BH	COBIB.BG	COBIB.AL	COBIB.RS	Total
Monographs	2,851,957	2,007,878	422,699	321,057	411,291	510,613	86,738	120,419	6,732,652
Comp. parts	449,493	146,157	28,272	11,054	1,347	1,187	408	334	638,252
Serials	135,138	73,458	11,762	4,367	8,297	40,367	2,488	328	276,205
Articles	1,327,639	805,916	121,740	91,198	16,845	435,041	8,386	7,911	2,814,676
Perf. works	136,961	2,569	459	246	322	1	55	0	140,613
Other	8,261	4,213	217	2	489	2	35	4	13,223
Total	4,909,449	3,040,191	585,149	427,924	438,591	987,211	98,110	128,996	10,615,621
w/ RSR code	1,614,958	198,614	4,620	22,571	15,181	0	1,043	825	1,857,812

Fig. 3: Union catalogues COBIB bibliographic records

Bibliographic records exchange from 1 January 2016 until 31 December 2016									
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	1,193	246	375	323	23	7	93	2,260
COBISS.SR	4,126	0	799	861	957	254	44	957	7,998
COBISS.MK	593	1,962	0	80	63	209	0	0	2,907
COBISS.CG	1,482	9,223	559	0	1,409	49	10	622	13,354
COBISS.BH	900	1,531	78	364	0	6	0	149	3,028
COBISS.BG	20	38	120	6	1	0	0	14	199
COBISS.AL	109	71	42	19	12	4	0	14	271
COBISS.RS	448	19,220	446	3,036	1,583	10	3	0	24,746
Total	7,678	33,238	2,290	4,741	4,348	555	64	1,849	54,763

Fig. 4: Bibliographic records exchange

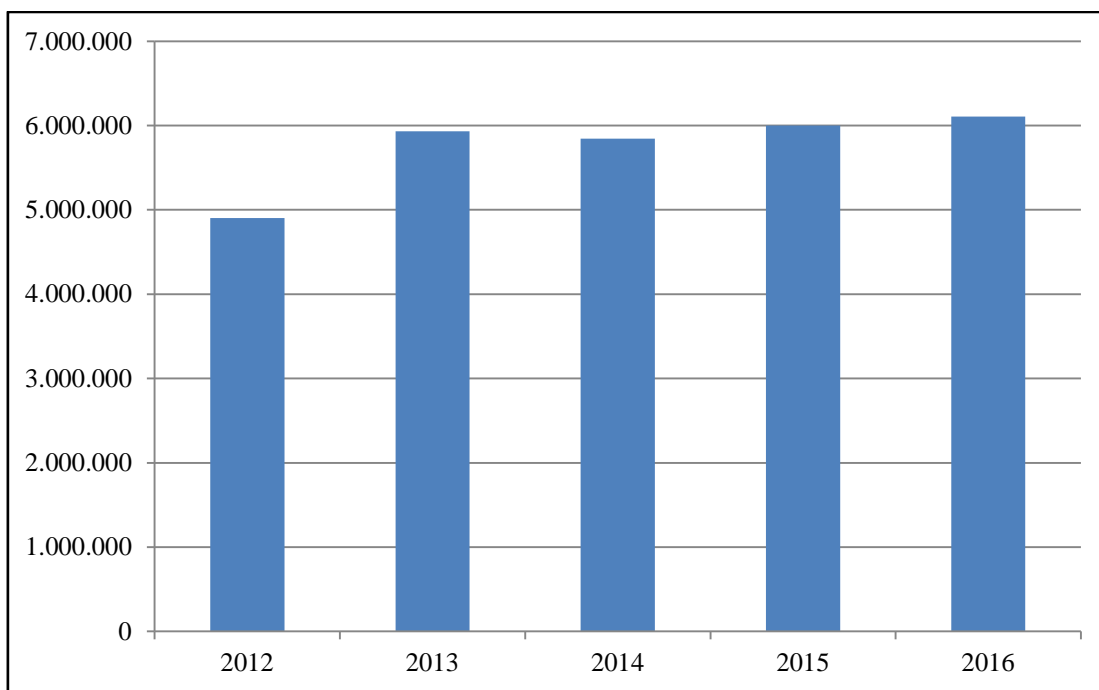


Fig. 5: Searching in union and local catalogues

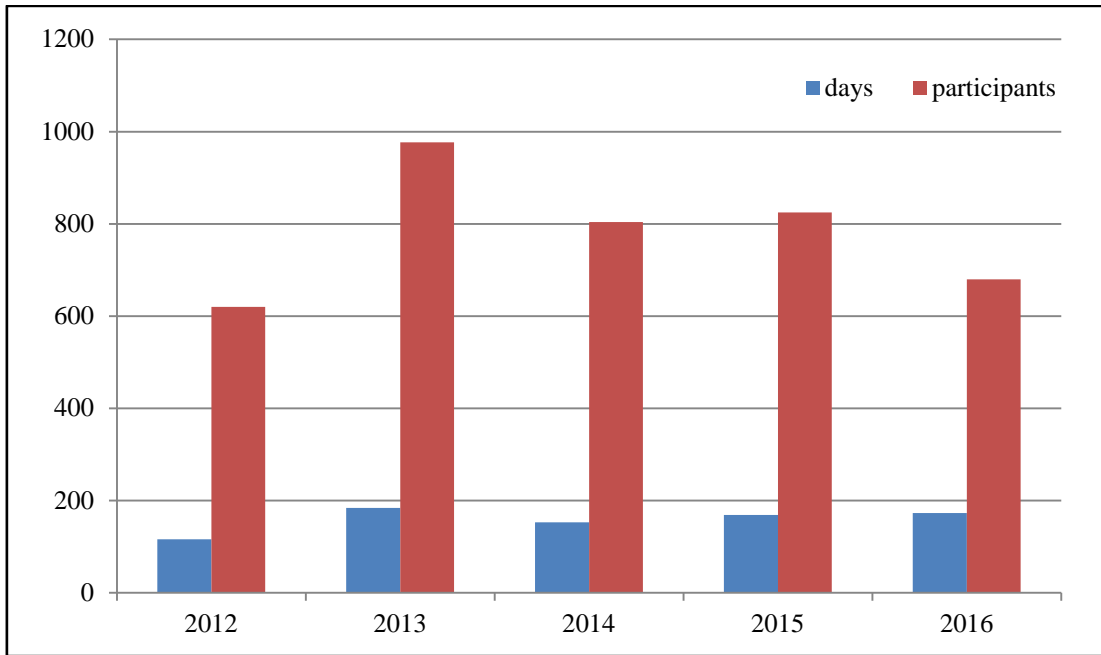


Fig. 6: Training and seminars

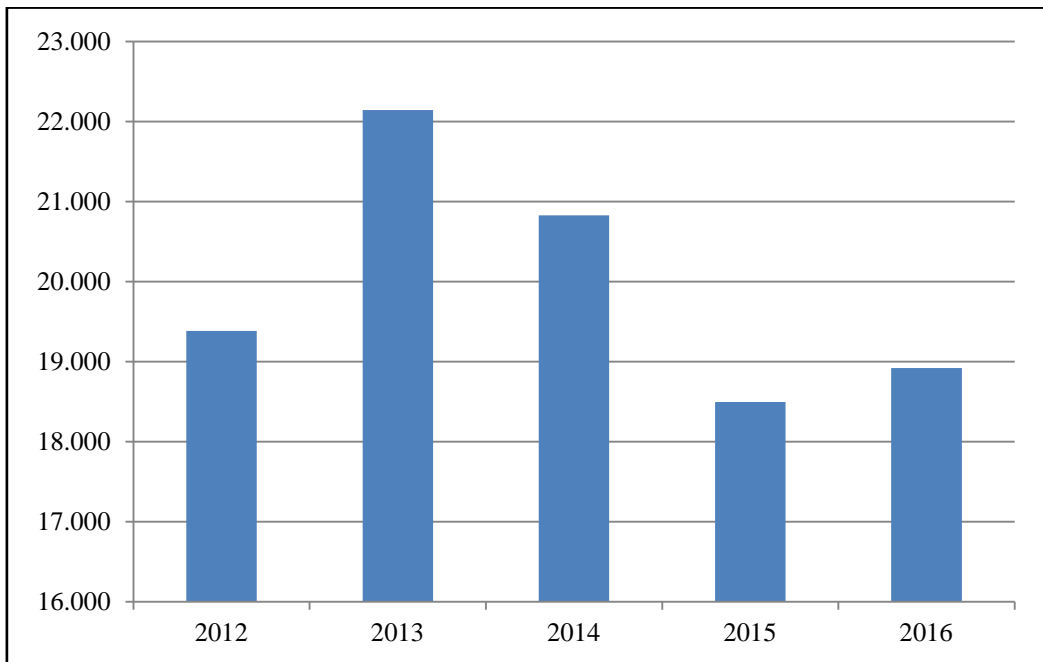


Fig. 7: Web bibliographies' printing

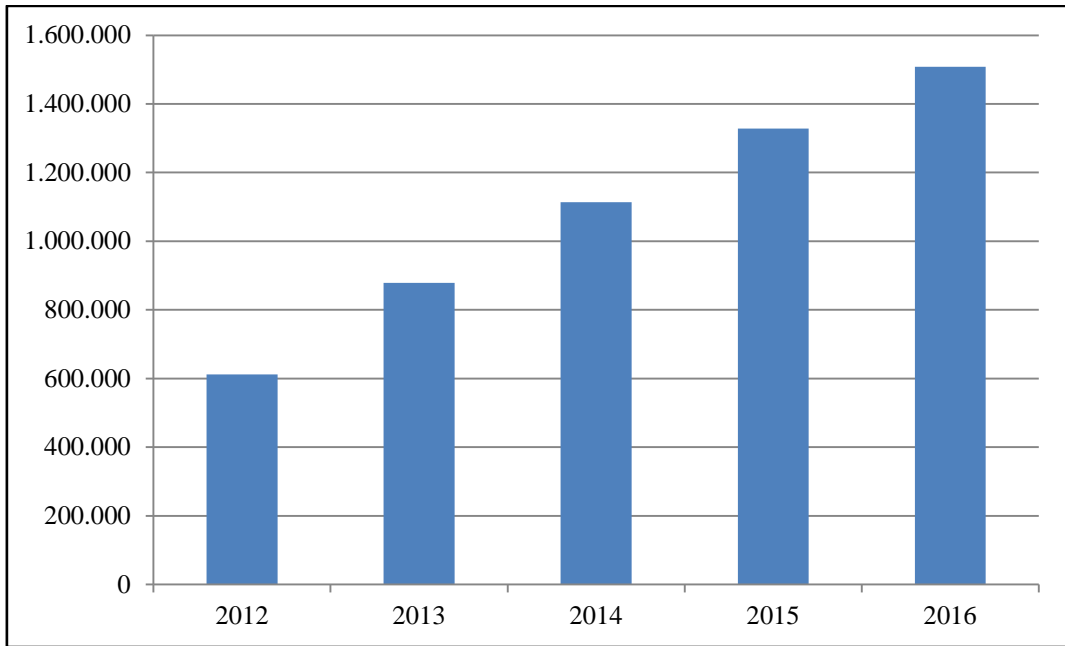


Fig. 8: Loan/Circulation (total)

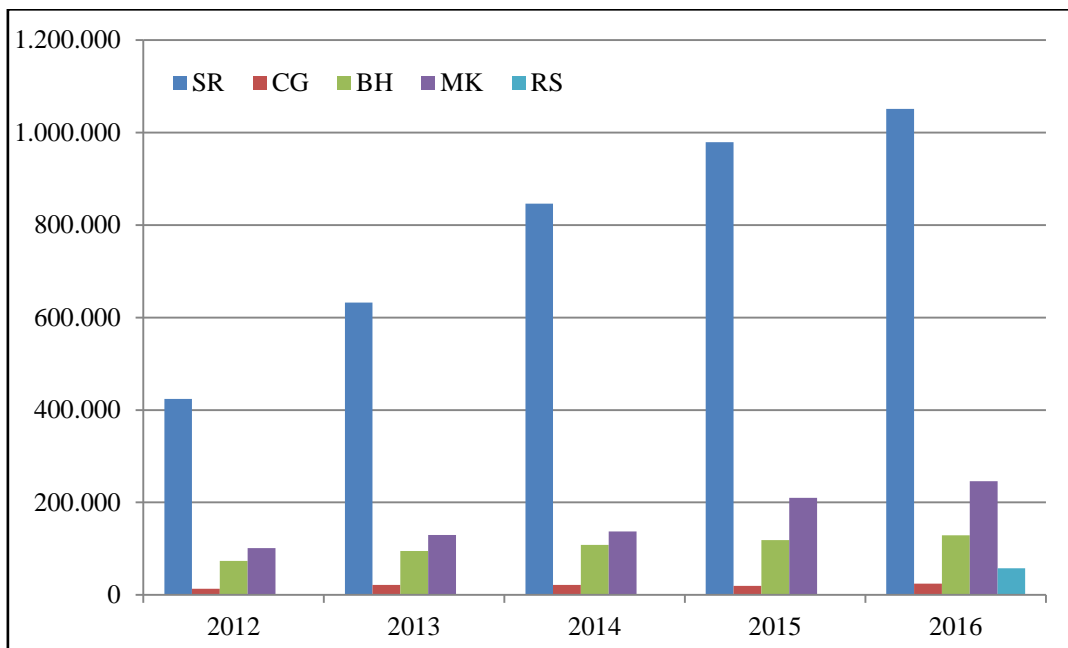


Fig. 9: Loan/Circulation (per country)

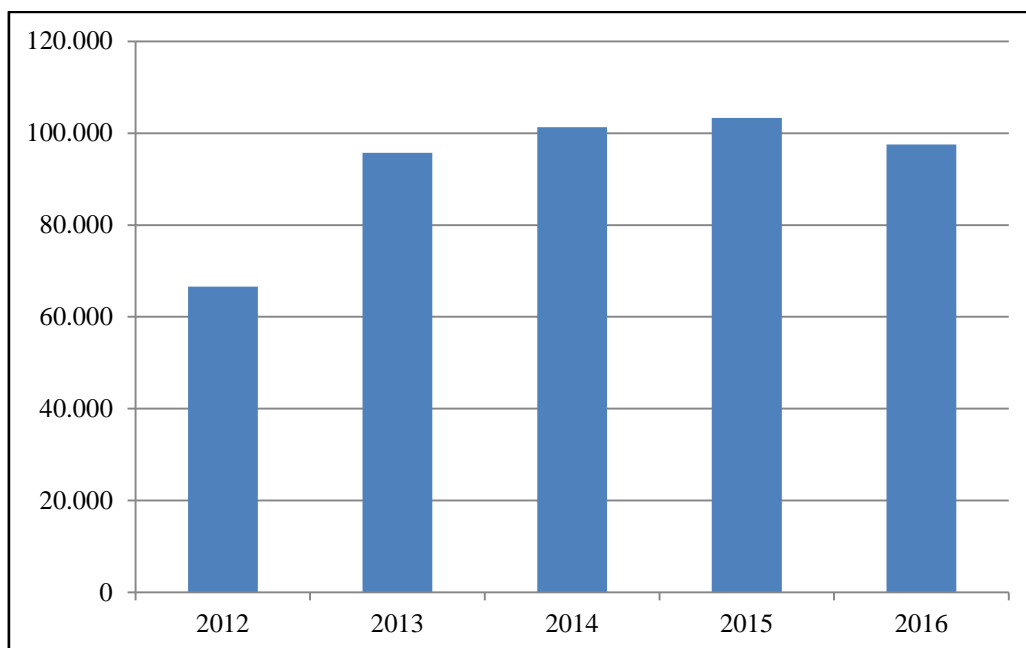


Fig. 10: Loan renewals and reservation – via COBISS/OPAC

VI. Conclusion

With relatively humble means we successfully strengthened the trust in Slovenian information technologies throughout the South-eastern European region. To this day, there was 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, 31 March 2017

Davor Šoštarič

Appendix

1. 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

2. Types of permits for creating new bibliographic records:

- permit A – privileges for shared cataloguing of monographs (books), and the creation of collection-level records and records for performed works
- permit B – privileges for shared cataloguing of component parts and continuing resources
 - B1 – privileges for shared cataloguing of component parts
 - B2 – privileges for shared cataloguing of continuing resources
- permit SER – privileges for shared cataloguing of serials
- permit C – privileges for shared cataloguing of non-book material
- permit D – privileges for shared cataloguing of antiquarian material