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**Ort:** Graz

**Jahr:** 1989

**PURL:** https://resolver.sub.uni-goettingen.de/purl?514822910_0034|log16

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# The Portuguese Library System and the Interlending Policy - Some Remarks

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In order to fully answer LIBER's request it would be necessary to have a different situation in the Portuguese library system. Issues related with the interlibrary lending system are just another facet of the serious situation affecting librarianship, book and reading policy. If this paper manages to set the scene of Portuguese librarianship, you will understand why I could not do exactly what I have been asked to.

The automation option as a means to improve library services became the solution thirty years ago. At the beginning, in an incipient way. Nevertheless always with the aim to find a solution for existing problems within the processing chain (delays, overlaps, inconsistency of information). Although automation has started with the circulation system, integrated systems are nowadays becoming quite popular. The interaction of reading and reader circuits is becoming more efficient from which both users and final users are profiting.

The Biblioteca Nacional (BN) has chosen an integrated solution because it was convinced this would be the way to succeed in dealing with long established non-desirable problems, and it is in the process of installing it. There were four targets which led to the above mentioned option:

1. to guarantee on a regular basis the processing and publishing of the National Bibliography;
2. to improve the Union Catalogue services;
3. to start the interlibrary lending system;
4. to promote a national acquisitions policy.

You may wonder why all this noise about such a common situation. The Biblioteca Nacional has spent the last decades on its own, even if this is denied. The big decisions about the profession and its professionals never took into account the BN. At a certain point, one could not distinguish between cause and consequence of such an exclusion. Outside the library and for socio-economic reasons, the so-called documentation centres were created without a previous plan; academic libraries without a comfortable financial support could not do anything but survive. As they were poorly organized among themselves, they could not make themselves listened to. Moreover, the Biblioteca Nacional was blamed for its poor role as national bibliographic agency according to the content of its respective law.

To overcome this situation was very urgent; it meant to face in an organized way the professional environment, taking advantage of the long practice of BN, and in Portuguese terms, of its significant number of librarians.

In any country, the national library is never just another library. Since these libraries are a sort of *nation's memory*, the number of documents processed and kept there entitle them to the capacity to establish and publish standards; to experience solutions; to carry out procedures or to evaluate solutions. On the whole, things inconceivable with any other library.

The BN held these capacities, inactive though.To awake the feeling of a team; to make clear the true role of BN among other libraries and in the profession; to explain how the computer would be able to gather the overall effort - this was indeed what was done.

Nevertheless, to automate was not a participated decision. It was indeed taken at the highest level which increasingly won support at BN. The broad information about what was going on, or about technical decisions taken in working groups or in meetings; the systematic training programme - according to a previous plan which would involve the whole BN staff - should calm down the staff, while the idea that change would be brought in by the computer became stronger. Somehow, the right things in the right place thanks to the computer!

In fact, change was starting to happen inside and outside Biblioteca Nacional: different human and hierarchical relationship, new management with wider distribution of responsibility and new job descriptions, easier access to information and levels of decision. In a way, the BN freed itself from restriction, and won its place of *first among equals*. It became the centre of an information system which had never been successful before. This was the change outside, not always widely accepted.

Our experience is, as yet, too short to conclude anything, but we are starting to gather positive as well as negative feedbacks. We are also collecting interesting and bewildering staff attitudes. On the whole positive feedbacks are in the majority. Among four hundred different libraries looking eagerly for the BN's technical advice, not even six are unpleased with the way things are happening. In my own viewpoint, the occasional doubts of BN staff are to be taken into account, and these happen when we are on the verge of another change, regardless of its importance. Correct evaluations of these doubts are splendid management indicators. To give quick and precise information whenever needed has proved most useful under those circumstances. Furthermore, it is necessary to bear these indicators in mind because they warn us that:

1. the change is not yet wholly sound;
2. the process, because it is a change, still requires a continuous monitoring.

You may very well wonder whether the automation of BN will indeed affect other Portuguese libraries. My answer is undoubtedly yes, for four reasons:

1. since BN is a normative library, its standards will reach libraries with which some sort of relation exists;
2. BN alone holds about half of the titles held by Portuguese libraries;
3. since the Portuguese government is trying to enrich public libraries with stocks representing mainly the Portuguese intellectual production (this decision will allow an updating of collections; will promote Portuguese culture; will eventually protect the publishing industry) it means that libraries are obtaining books covered by legal deposit, therefore previously processed by BN;
4. by means of the training programme, procedures and practices of BN are naturally spread out - during 1987 about four hundred members of other libraries have attended BN training courses.

Therefore, as a result of an internal change, BN became the true centre of a system poorly outlined yet, but already breathing. One might not be sympathetic with this centralizing procedure because it eliminates the freedom of other organizations. This is indeed a delicate question which pushes me immediately to a short analysis of Portuguese librarianship.

Data that follow are according to LIB 2[1] and official statistical sources,[2] both referring generally to 1985 and 1986. Data from theses sources not always agree among themselves; nevertheless by mentioning both we get a fair idea of the poor situation. Data were chosen at random, and I was not concerned with exhaustiveness. On the contrary, these data were as good as any other to illuminate the difficult Portuguese library case, and the problems we are all facing.

**Sort and number of libraries**

As referred in LIB 2, the existing libraries in Portugal are as follows:

| | |
|---|---|
| Biblioteca Nacional | 1 |
| Public libraries | 103 |
| Academic libraries | 167 |
| Special libraries | |
| (governmental) | 197 |
| (private sector) | 90 |
| TOTAL | 558 |

This figure represents all libraries with which it is possible to work since it equals 71,8 % of the total number of libraries surveyed (28,2 % of the libraries which received questionnaires have not answered).

The results of the statistics of INE (Instituto Nacional de Estatística) are similar. INE also takes into account school libraries and Calouste Gulbenkian Foundation mobile libraries, summing up altogether 767 libraries.

We have then two groups of libraries, with different implications. As a matter of fact, some libraries within the second group hold nothing but a book shelf, locked most of the time.

**Size**

Among the 558 mentioned libraries surveyed by LIB 2

| | | |
|---|---|---|
| 149 | have less than | 1,000 monographs (titles) |
| 153 | have less than | 5,000 monographs (titles) |
| 72 | have less than | 10,000 monographs (titles) |
| | and only | |
| 123 | have more than | 10,000 monographs (titles) |

Among the first group (less than 1,000 titles), 55 are academic libraries. That is, 32,9 % have less monographs than some of us have at home!

On the other hand, only 41 public libraries are among those with more than 10,000 monographs. This is not that bad, but it is no favour either!

I could keep on and on, mixing data and looking at the amazing results. Just to make sure, a few questions must be raised: among those 10,000 books, how many are Portuguese titles? How much cataloguing is done misusing the BN processing of legal deposit (not all of them receive cards)? And if an academic library holds 1,000 titles, what is the annual growth? Which part of the budget does it represent? How much is that library related to the scientific community it is supposed to serve? How does it survive, and how is it accepted? How does it respond to its users' needs? Better asking, does it have any users? No answers, although plenty of data to be surveyed.

I will not refer in this paper to the situation regarding periodicals, far more worrying and sad; I will not even mention non-book materials which are totally lacking in Portuguese libraries. In a country where the rate of illiteracy is about 25 %, neither the government nor professionals have yet realized how powerful visual media are. And the future of non-book material provision in Portuguese libraries is difficult to foresee, since schools of librarianship are not including the teaching of media librarianship in their curricula.

**Geographical distribution**

Making use of data collected by INE from a whole of 557 libraries, their geographical distribution is as follows:

| | |
|---|---|
| North | 84 |
| Centre | 91 |
| Lisbon and Tagus valley | 335 |
| Alentejo | 36 |
| Algarve | 11 |

The macrocephaly of Lisbon is as obvious as frightening, but different data would have allowed me to evaluate

1. if the unbalance shown above goes along with a similar socio-economic unbalance (the most developed towns, and those with the highest density as well as the most important cultural and civic centres are spread out along the coast).
2. whether the above mentioned geographical distribution is related or not with the level of illiteracy. If not, how can the survival of a cultural focus such as a library be explained in a hostile environment, and above all, how can the absence of communication between the library and the environment be explained?

**Acquisitions**

In this respect statistics published by INE are of no use, and LIB 2 does not even mention the problem. As a matter of fact, INE gives a figure corresponding to holdings, not titles, and since INE does not make the difference between purchases, gifts or exchanges, we have no idea about investments done, and we also ignore whether there is an acquisitions plan in each library surveyed.

Besides, if copies of legal deposit are redistributed by BN for twelve major libraries, these copies cannot be considered on an acquisitions plan analysis.

To proceed with some sort of national policy for acquisitions it would be mandatory to have a clear idea about how documents come into the library. From data surveyed by INE referring to 1985, there has been a stock increase of about 3,4 % and 2,7 % in public and academic libraries respectively. Among these figures, which is the rate of Portuguese titles (legal deposit)? And what about foreign titles? Is there any other sort of documents among legal deposit such as grey literature?

It is not just the question of planning acquisitions or building up collections. Many of these libraries are members of the Portuguese Bibliographic Database

(Base Nacional de Dados Bibliográficos - PORBASE), so the input of current and retrospective bibliography must be planned and managed; the system must also be managed - shall we do original cataloguing for foreign literature, or shall we buy the corresponding records from foreign facilities? If we decide to catalogue foreign titles, shall we choose a description of level 1, according to AACR2, or shall we follow a full description? What is the size of memory we are going to need? What will be the collections growth rate? What sort of budget shall we anticipate?

**Interlibrary lending**

Following once again data published by INE, we can undoubtedly confirm that there is no interlibrary lending system in Portugal whatsoever. As many other activities requiring co-operation, this one is also refused.

| | Loans to other Portuguese libraries | Loans to libraries abroad | Loans from libraries abroad |
|---|---|---|---|
| Biblioteca Nacional | - | - | - |
| Special libraries | 1,748 | 1,014 | 61 |
| Public libraries | 510 | 24 | - |
| Academic libraries | 2,651 | 81 | 4 |

Data mentioned refer to successful loans, and do not include the 10, 20 or 30 % extra requests not satisfied.

Since there are 126 academic libraries, we are entitled to conclude that each of them makes a loan twice a month.

There are many answers trying to explain the situation, but in my personal viewpoint the reason for this appalling situation must be the total lack of knowledge about holdings of other libraries. The increase in photocopying articles seems to corroborate my view. Indeed, there is a printed catalogue containing the Union Catalogue of Periodicals existing in Portuguese Libraries. One can also evoke the short budgets, or the librarians' lack of initiative, but I still have the same opinion: the problem is the lack of reading habits of the population in general; the very small number of people making use of libraries; the complete divorce between research and libraries.

Because photocopies can circulate easy, because their reading is quicker, the number of photocopies done on request by external libraries is a little bit more encouraging. Still, the number of photocopies surveyed by CDCT (Centro de

Documentação Científica e Técnica - Technical and Scientific Documentation Centre) for 1985, as mentioned by LIB 2, amounts to 2,300.

Since costs are also involved when ordering or producing photocopies it does not seem that costs can be a valid argument. As I said previously the lack of information about holdings of other libraries, and the lack of reading habits must be the true reason.

As soon as the automated Union Catalogue at BN will be in existence problems will then be partially solved. To improve reading habits is a problem to which the Portuguese Institute for Reading and Book Policy (Instituto Português do Livro e da Leitura - IPLL) is paying great attention. They strongly believe that a network of public libraries will awake users, and altogether libraries, publishers and booksellers will profit. They do believe that public libraries have the capacity to create and develop reading habits which sooner or later will affect other libraries.

This is indeed an urgent task, since according to data published by the Portuguese Association of Publishers and Booksellers (Associação Portuguesa de Editores e Livreiros - APEL) only 9,3 % of the Portuguese population read more than 10 books per year, and only 8 % of the population buy more than 10 books during the same period of time.

The scene I have just set is real, and unfortunately exists in Europe. The last remaining question is: when in this turmoil a sign of life bloomed, should we have stopped it? We could have done it arguing that it was out of its time, or that it just came before feasibility studies were finished. Would we have won anything?

It is true that in a small country with few libraries, poorly stocked and disorganized, such a strong focal point as Biblioteca Nacional can stop other experiences of interest, and it can even stop research in this area because the pragmatic solution chosen is proving itself efficient. But if this is ever to happen, shall we blame BN, or shall we blame those who are unable to bring a valid contribution into the profession?

The Biblioteca Nacional set the first stone. Biblioteca Nacional holds available to the community a sophisticated equipment that allows us to break the isolation in which we have been living; we are now able to exchange information with colleagues beyond the border. As a community, we have the tool and the time to undo the ball of thread we have in hands. The time is not that long: ten years, the computer's life time.

During the next ten years, while converting information nearly lost, misused or forgotten, and while changing habits, we must start seeking for new solutions and technologies.

At the moment, at Biblioteca Nacional we are converting the Portuguese Bibliography into machine readable form, and we have started the input of the Union Catalogue, up to now just available on cards.

In the anticipation of the interest likely to come, the department for interlending at BN has been activated (users at BN are beginning to ask a lot of questions about records available at the PORBASE but whose call numbers are not the BN ones). This new department is supposed to fill the above mentioned gaps, such as the interlending of monographs. Another aspect Biblioteca Nacional is interested to exploit is the circulation of grey literature - above all theses and other academic papers which since 1986 are covered by legal deposit. According to existing data (CDCT), BLDSC (British Library Document Supply Centre) is the biggest supplier, and so it will be in the future. There is no valid reason to refuse efficiency shown by BLDSC. For Biblioteca Nacional the aim still is to offer a wide choice, taking advantage of its largest organization.

BN does not intend to perform all sort of functions forever. But it seems unavoidable to perform them all for some time. The Biblioteca Nacional in the Portuguese circumstances is not a mere normative library, and must be sensible enough to delegate functions whenever other libraries show capabilities enough to carry out some of them. There is also a project of interface with the network of public libraries in order to carry out the production of CD-ROMs containing the National Bibliography, as soon as technology is available. Another project to be conducted by BN will deal with the retrospective conversion of catalogues of the major special and academic libraries.

The number and importance of these projects do not frighten us, but their accomplishment will only be possible when it will be understood that modernization and progress cannot be achieved when relying only on individual or organizational will: structure, budget and support are needed. This task will take us, from now onwards, a lot of time and energy.

It would have been difficult to find a different answer to LIBER. I felt I had the obligation to let European colleagues know our problems, and above all to let them realize we are alert, and that we do not want to loose contact with European initiatives dealing with interlending or CONSPECTUS or related to retrospective conversion policies, regardless of some temporary drawbacks.

## References

1 *A aplicação e o impacto das novas tecnologias de informação nas bibliotecas: a situação em Portugal: relatório final preparado para a CCE/DGXIII pela Associação Portuguesa de Bibliotecários, Arquivistas e Documentalistas.* [Lisboa:] BAD, 1987. (State of the art of the application of new information technologies in libraries and their impact on library functions - EUR Report. Vol. 11.)

2 *Estatísticas da cultura, Desporto e Recreio 1986.* Instituto Nacional de Estatística. Lisboa: INE, 1987.