

Country report: Cataloguing in South Africa

IFLA Meeting of Experts on an International Cataloguing Code (IME ICC5)

14-15 August 2007

Pretoria, South Africa

Susan Battison

Project Leader: South African National Bibliography

National Library of South Africa

Introduction

South Africa, at the southern tip of the African continent, is a land of diverse populations and cultures; a population of approximately 48 million with their roots in Africa, Europe and Asia. Since 1994 South Africa recognizes eleven official languages, viz., Afrikaans, English, Ndebele, Northern Sotho, Southern Sotho, Swazi, Tsonga, Tswana, Venda, Xhosa and Zulu. The estimated rate of functional literacy in 2004 was 33.9% (*Libraries for the future*, 2007, p. 135). Libraries in South Africa developed over the past 150 years and include a national library, public/community libraries, special libraries, school libraries, government libraries and higher education libraries (South African yearbook 2005/06, 2005, p. 129). There was an estimated 11 373 libraries in South Africa in mid-2003, and based on the 2001 population census, approximately 1 library for every 25000 people (*South African yearbook 2005/06*, 2005, p. 130).

Languages of catalogues

The recognition of official languages has been reflected in the language of the catalogues of South African libraries. Prior to 1994, when only English and Afrikaans were recognized as official languages, most library catalogues were either in English, Afrikaans, or a combination of these two languages. After 1994, when 11 official languages were recognized, most libraries adopted English as the language of their catalogues.

Cataloguing education in South Africa

Cataloguing education is provided at the following South African higher education institutions: Durban University of Technology, University of the Western Cape; University of Zululand; University of Cape Town; University of Limpopo; University of Pretoria and University of South Africa. The depth of cataloguing training offered differs from one institution to the next and practical cataloguing is more part of on-the-job training, rather than as part of the undergraduate library and information science coursework. This places the burden on cataloguing training on employers. South Africa seems to have a lack of experienced cataloguers and there is a great need for skills transfer to younger librarians.

The National Library of South Africa presents the teleMARC courses twice per annum. Cataloguers may register for either the Basic teleMARC course, or the advanced teleMARC course, Beyond Books.

Advanced cataloguing workshops and basic cataloguing workshops are presented by the Library and Information Association Interest Group for Bibliographic Standards (LIASA IGBIS) and Sabinet Online, through the funding of the Carnegie Corporation,

respectively. Sabinet Online also trains cataloguers in the use of OCLC's Connexion cataloguing interface.

Cataloguing standards

South Africa has used the Anglo-American cataloguing rules as the standard cataloguing code. Most libraries in South Africa make use of Dewey Decimal Classification, with some using Universal Decimal Classification and other various in-house systems. Most libraries use Library of Congress subject headings.

Machine Readable Cataloguing and Library management systems

South Africa developed SAMARC (based on UNIMARC) and this remained the official exchange format until a conference held in Pretoria in 1997 adopted USMARC (later MARC21) as the official exchange format in South Africa. Some of the library management systems used in South Africa through the years include, Erudite, DOBIS/LIBIS, Urica, PALS, Aleph, Libwin, Unicorn, Millennium, and InMagic/DbText.

Bibliographic control committees in South Africa

SAILIS Committee for Bibliographic Control

The SAILIS Committee for Bibliographic Control was primarily responsible for offering bibliographic control guidelines and recommendations on a national level, the SAILIS awards for bibliography and other projects related to bibliographic control. The members of SAILIS Committee for Bibliographic Control included the directors of the two national libraries and bibliographic control experts (Fourie & Burger, 2007, p. 4). This committee ceased to exist after SAILIS was disbanded.

Advisory Committee on the State Library Bibliographic Services and Interim Committee for Bibliographic Organisation

The Advisory Committee on the State Library Bibliographic Services advised the Library on bibliographic control needs within the country and was active from 1994 to 1996. This committee was succeeded by the Interim Committee for Bibliographic Organisation (ICBO). ICBO initiated the investigation into the suitable MARC format for exchange of bibliographic records in South Africa. This investigation culminated in the Seminar on a Future MARC Format for South Africa, held in Pretoria, 24-15 April 1997 which led to the selection of USMARC (later MARC21) as the exchange format for South Africa (Fourie & Burger, 2007, p. 4-5). These committees no longer exist.

Sabinet Online Standards Committee

The Sabinet Online Standards Committee (SOSC) was formed on 29 October 1999 to investigate and advise on issues relating to the standard and quality of data input on the SACat database. Since that time much work has been done in developing core records and useful cataloguing guidelines to enhance and ensure the ongoing improvement of the SACat resource. The following are examples of the committee's work: guidelines for the cataloguing of electronic resources; development of core records for all material types; improving holdings information on SACat; authority control on SACat; database maintenance on SACat; advising on standards issues; quality control on SACat. The Committee has several standing groups which include: Quality Control & Database Maintenance Working Group; Authority Control Working Group; Holdings Working Group. The ad hoc groups have concerned themselves with the following issues: member loading; interfacing and holdings; and workflows.

(http://www.sabinet.co.za/cataloguing/cat_soscomm.html)

Library and Information Association of South Africa Interest Group for Bibliographic Standards (LIASA IGBIS)

LIASA IGBIS is a national interest group of the Library and Information Association of South Africa. LIASA IGBIS was launched in 2001, properly constituted in 2002, and has been active since 2003 (http://www.liasa.org.za/interest_groups/igbis.php).

LIASA IGBIS has the primary role of promoting bibliographic standards through the presentation of workshops and seminars, and focuses on the needs of more advanced cataloguers. LIASA IGBIS has branches throughout the country which on occasion also present workshops, although most of the professional cataloguing workshops are presented by the national committee, centred in the Gauteng region. The branches are in KwaZulu-Natal, the Eastern Cape, the Free State and Limpopo Province.

National bibliography

The National Library of South Africa is legislated to be the national bibliographic agency in South Africa. The South African National Bibliography (SANB) has been published in printed form, originally in the form of printed author lists (1933-1958), then quarterly with an annual cumulated edition (1958-1999) and from 1999 it has been available in electronic form via the National Library's webOPAC in the SANB scope. The SANB includes monographs, serial publications, official publications, maps, standards, and non-book material published in South Africa and received in accordance with the *Legal Deposit Act, 1997*. The SANB records are also available via *South African studies* (1989- CD and online database), SACat (1989-) and WorldCat (1989-1999 as part of the SACat load and 1999- added directly).

Co-operative cataloguing in South Africa

During the early 1940s the State Library started collecting catalogue cards from libraries and filmed them on microfiche. These microfiche represent a South African union catalogue that was maintained by the Joint Catalogue Section (JC) at the Library.

A union catalogue of periodical holdings in South Africa was maintained by Periodicals in South African Libraries (PISAL) at the CSIR. PISAL moved to the State Library in the late 1980s. The PISAL data was originally maintained manually and then later maintained online on the South African Co-operative Database (SACD, later SACat) managed by Sabinet Online. During 1996-1997 both JC and PISAL closed due to lack of resources at the Library. Another reason for these closures was that South African libraries contributed their bibliographic records directly to SACD and the State Library's services were no longer regarded as essential.

SACD and SACat

The South African and Bibliographic Network (SABINET), established in 1983, and later Sabinet Online, established in 1990, is responsible for providing the IT infrastructure for the South African Cooperative database (SACD), known as SACat from 1999.

SABINET bought the WLN system from the Western Library Network in the US in 1983 to provide a central cataloguing service and a central technology platform which could be used to identify and locate materials held in South African libraries. As part of the system, WLN included the bibliographic records that were on their system, but excluded all the holdings information. These records formed the core of the system and were used by the SABINET members to add holdings. These records could also be exported to local systems if required. South African libraries' holdings were added mostly online by members and the then State Library. The State Library added a large number of holdings to create the Joint Catalogue (JC) and Periodicals in South African Libraries

(PISAL) catalogues online, as well as adding holdings on behalf of non-member libraries. To further enhance the number of records available for adding holdings to and for downloading, SABINET purchased and loaded records from the Library of Congress (LC) as well as the British National Bibliography (BNB). Some original cataloguing by the SABINET member libraries also took place on the system.

The JC at the State Library was responsible for quality and authority control on SACD. In 1989 SANB records were added to the SACD for the first time and this practice continues to today.

During 1999 Sabinet Online introduced OCLC's WorldCat to the cooperative cataloguing environment in South Africa. Libraries are now expected to catalogue directly onto WorldCat and then download the records to SACat and into their own databases. In an effort to improve the quality mechanisms and procedures it was decided, in 1999, to move the cataloguing process to another platform. This was a combination of the Innovative Interface Inc, Innopac software to house the SACat and an agreement with OCLC to use WorldCat as a source of bibliographic records for copy cataloguing (as well as a platform for original cataloguing) when a record could not be found on SACat. At this stage all the records in SACat were converted from SAMARC to MARC21.

Also as part of this process approximately 1.3 million of the 2.8 million bibliographic records were matched against OCLC's WorldCat and where possible better quality WorldCat records were returned and loaded into the SACat. Also the authority headings were matched and upgraded at LTI. There were approximately 7 million holdings on the database by this stage.

Since then a number of clean-up projects have taken place. A number of institutions have reloaded all their holdings, a number of data fixes have taken place on the database and a de-duplication project has been undertaken to reduce the number of duplicate bibliographic records as well as duplicate holdings. SACat now contains in the region of 3.8 million bibliographic records from various sources and approximately 8 million holdings. There are now approximately 160 institutions adding holdings to SACat, with about 95 of these adding bibliographic records via WorldCat.

Consortia in South Africa

Library consortia are mainly based at the higher education institutions in South Africa.

Cape Library Consortium (CALICO)

CALICO was established in the Western Cape in 1992 (*Libraries for the future*, 2007, p. 82) representing the libraries at the University of Cape Town, University of Stellenbosch, University of the Western Cape and Cape Peninsula University of Technology. Calico has a various working groups including the CALICO Cataloguing Working Group (CCats) (<http://www.chec.ac.za>).

South Eastern Alliance of Library Systems (SEALS)

The SEALS consortium is in the Eastern Cape comprising of the libraries of the Nelson Mandela Metropolitan University, Fort Hare University, Rhodes University and Walter Sisulu University. The consortium was started during 1998, and the shared database server is hosted by Rhodes University, Grahamstown. Each institution is responsible for cataloguing and maintaining their own bibliographic records, while authority control is shared amongst the members. SEALS has a standards committee which meets twice a year to discuss issues relating to cataloguing, circulation and other shared issues. They

also have a Consortium cataloguing e-list. All members have received training from Sabinet Online in general cataloguing and cataloguing on WorldCat. Authority control training was provided by Unisa's authority control expert. (Minnaar, 2007).

Eastern Seaboard Association of Libraries (ESAL)

ESAL was established in 1997 and is based in KwaZulu-Natal (*Libraries for the future*, 2007, p. 82). Members of this library consortium include University of Zululand, Durban University of Technology, Mangosutho Technikon; and University of KwaZulu-Natal. ESAL has recently implemented the Unicorn System from SirsiDynix and has a shared database. (<http://esal.dut.ac.za>)

Gauteng and Environs Library Consortium (GAELIC)

GAELIC is an academic library consortium, founded April 1996 within FOTIM (Foundation of Tertiary Institutions of the Northern Metropolis). The initial membership of six academic libraries has grown to eleven institutions across three South African provinces: Gauteng, North-West and Limpopo and now also includes two members beyond South Africa's borders. Current members are: University of Limpopo, North-West University, University of Johannesburg, University of Pretoria, Tshwane University of Technology, University of the Witwatersrand, Vaal University of Technology, University of Venda, University of South Africa, University of Namibia and University of Botswana.

GAELIC has two focus groups relating to cataloguing. The Cataloguing Focus Group has the purpose of developing the skills and expertise of the staff in the GAELIC libraries in applying international bibliographic standards and to provide a platform for discussion and knowledge sharing with the ultimate goal of ensuring optimal information retrieval and participation of members of GAELIC libraries. The Metadata Focus Group has the

purpose of promoting and coordinating the creation and application of metadata, improving resource description and recovery, interoperability and open access; and developing skills and expertise in the innovative use of metadata within the GAELIC libraries.

GAELIC participates in the NACO (including SACO) programme of the Library of Congress as the GAELIC South Africa Funnel. The active NACO participants are: University of South Africa, North-West University (Potchefstroom Campus) and the University of Pretoria. The University of South Africa attained OCLC enhanced cataloguing status in 2007. (Visser, 2007).

Free State Libraries and Information Consortium (FRELICO)

The Free State Libraries and Information Consortium (FRELICO) was formed in 1996 as part of The Andrew W. Mellon Foundation grant to plan for the utilization of electronic networks to expand access to library and study materials in the Free State. Members of this consortium include the University of the Free State, Central University of Technology, Mangaung Local Municipal Library Service and the Sasol Library. Frelico cataloguers rely on LIASA Interest Group for Bibliographic Standards for their training needs and liaise closely with the cataloguers at GAELIC (Raubenheimer, 2007).

Places of legal deposit consortium

The planning for a consortium of the places of legal deposit in South Africa started in early 2000. The places of legal deposit consortium include the National Library of South Africa, Mangaung Local Municipal Library Service (including the National Drama Library), Msunduzi Municipal Library, and the National Film, Video and Sound Archives. The Library of Parliament is another place of legal deposit in South Africa but is not a

member of the consortium. The implementation of the consortium took place over many years and the various databases were loaded during late 2006 and early 2007. As there is a large overlap of the legal deposit material collected by these places of legal deposit it is hoped that co-operative cataloguing will share the burden of providing access to South Africa's documentary heritage.

South African National Research Information Consortium (SANRIC)

This consortium was established to support research activities within South Africa.

(<http://sanric.co.za/profile.htm>)

Conclusion

South African cataloguers have kept up to date with the developments and trends of the international cataloguing arena. We are largely Anglo/American-centric in the use of cataloguing standards and rules. We share the same technical and professional problems that cataloguers experience elsewhere. But we are also challenged to provide bibliographic data for a multicultural and diverse society while keeping up to date in a constantly changing cataloguing environment. Co-operative cataloguing and the sharing of expertise are common amongst the cataloguers of larger institutions in South Africa, but the opportunities offered by LIASA IGBIS and Sabinet Online could be utilized by any South African librarian interested in bibliographic control.

Bibliography

Fourie, I. & Burger, M. *Bibliographic control in South Africa*. 2007. Paper presented at WLIC: 73rd ILFA General Conference and Council, Durban, South Africa 19-23 August 2007

Libraries for the future : progress and development of South African libraries.

2007. Pretoria : LIASA.

Raubenheimer, Huldah. 11 October 2007 ***Frelico***. e-mail

SEALS. 10 September 2007. E-mail from Desiree Minnaar

South African yearbook 2005/06. 2005. Pretoria : Government Communication and Information Service.

South African Cooperative Database (SACD) / SACat : the role of the National Library of South Africa and Sabinet Online. S. Battison, et al. 2005. Unpublished report

<http://esal.dut.ac.za> (Viewed on 30 October 2007)

http://www.liasa.org.za/interest_groups/igbis.php (Viewed on 30 October 2007)

<http://sanric.co.za/profile.htm> (Viewed on 30 October 2007)

<http://www.chec.ac.za> (Viewed on 30 October 2007)

http://www.sabinet.co.za/cataloguing/cat_soscomm.html (Viewed on 30 October 2007)

Visser, Louette. 18 September 2007. ***GAELIC***. e-mail