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Resource sharing in Latin America

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Abstract

Purpose – The purpose of this study is to investigate the developments in resource sharing in Latin America.

Design/methodology/approach – The approach is based on research carried out in a number of countries in Latin America financed and supported by a number of organizations, including the International Federation of Library Associations and Institutions (IFLA), The International Network for the Availability of Scientific Publication (INASP) and The International Coalition of Library Consortia (ICOLC).

Findings – Dominance of English language databases, publications and indexing has notably created a barrier for access and entry of Spanish language publications in Latin America. The consortia project encountered barriers of language and infrastructure, conflicts with trade barriers, the value of forming consortia and the values of literacy. Prospects of positive change were noted with engagement in electronic resources.

Originality/value – One of the very few studies of developments in resource sharing in Latin America with an excellent apparatus of Web sites and references.

Keywords Academic libraries, Consortia, Collaboration, Resources, University libraries

Paper type Research paper

Background

There is no lack of publishing in Latin America but data are elusive. The UCLA Statistical Abstract of Latin America remarked on the lack of accurate reporting and the shortage of current tracking for any comparison for prior years (UCLA, 2008). On the other hand, Mario Vargas Llosa's (Peru) first book in 1963, La Ciudad y los Perros, won the Cervantes Prize and has been translated into 30 languages. He won the Nobel Prize for Literature in 2010 and currently serves as the Director of the Cervantes Virtual Library in Bilbao, Spain. The world mourned the loss of Vargas Llosa's close friend, Gabriel Garcia Marquez (Colombia) author of Cien Años de Soledad. Guadalajara, Mexico, hosts an annual book fair with financial support from the American Library Association among others to encourage extensive attendance. There are frequent mentions of "difficult regulations" by publishers and book sellers in the Spanish market related to distribution, online access, imports, exports, tariffs and the acceptability of the Spanish language (Wischenbart, 2014). Perhaps as a result of these factors, the registration of Spanish titles was static between 2006 and 2013. This trend keeps Spain as the main source of publishing in Latin America. (CERLALC, 2014). Many titles are not lent between neighboring countries. Spain will redistribute and promote only the most popular titles. The lack of a shared catalog to search for book titles and journals makes it difficult to identify and share titles with other countries (Volland, 2012).

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Research on resources in Latin America

Two international projects lead to the study of resources available in Latin America. The first was funded by the International Federation of Library Associations and Institutions (IFLA) in 2009 via the Academic and Research Libraries Section and focused on *research* of library consortia development. Additional funding was provided by the International Availability for Scientific Publications (INASP) and its related Programme for the Enhancement of Research Information (PERii). Support also came for the project in selected Latin American countries from the Swedish Agency for International Development (SIDA). This funding also enabled the second project, from INASP, which focused on *training* for library consortia development. Each project supported a separate group of Latin American countries.

The study of Latin American library consortia began via a general survey of IFLA members. Five countries were selected to provide a broad representation of geographic locations. Argentina and Chile are neighbors in the southern most region of South America, divided by a mountain range and distinct history and political differences. Costa Rica and Guatemala are close, have similar geology and climate but vastly different cultures and economy. Peru was selected because of its economy and recent library consortia development. A desirable outcome was to identify multi-national examples of

The results of this research could not occur without the collaboration from Karla Rodriguez Salas of the Universidad Nacional Costa Rica as a facilitator and developer for group activities and Awilda Reyes, West Chester University of Pennsylvania for her workshops and reports in Argentina and Chile. The project is deeply appreciative for the support from the International Federation of Library Associations (IFLA), the International Availability for Scientific Publications (INASP) and the International Coalition of Library Consortia (ICOLC). The greatest credit must go to the leadership within the respective countries of Latin America and the extent of multi-national cooperation to improve access to resources.

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cooperation as well as national development projects which would benefit from a library consortium. Workshops were developed to encourage the participating countries to share

information. Many of the countries already carried out the functions of consortia via cooperatives, associations, networks, societies, committees and other library activities. During the workshops, the countries presented reports on the status of their libraries with national development, association activities and other network, cooperative or collaboration projects. The focus of the investigation was to learn from the selected countries library consortia projects. Guatemala was later

recognized as a qualified country for INASP support.

INASP provides global library consortia development training and expertise. In addition to the IFLA list of countries for study, INASP added Honduras, Nicaragua and Bolivia to the library consortia development project. During training activities, additional representatives came from CBUES -Consorcio de Bibliotecas Universitarias de El Salvador[1] - a multi-national consortia of the Atlantic coast which includes Costa Rica, Nicaragua, Mexico and Panama; CONBIUCAR, de Bibliotecas Universitarias del Caribe Consorcio Centroamericano[2]; plus, in Bolivia, a small consortia of Catholic universities who are also members of CAAURII -Consorcio Académico de Acceso y Uso de Recursos de Información para la Investigación. INASP contributed global expertise in training and shared extensive resources. INASP has a standard report format following each workshop for participants and trainers to analyze the progress being made toward the establishment of library consortia. Finally, the Consorcio Iberoamericano para la Educación en Ciencia y Tecnología (ISTEC)[3] is an organization of academic, industry and research organization in Latin America and the Iberian peninsula. ISTEC has more than 50 affiliates in 17 countries and exchanges bibliographic material and obtains articles and chapters of books for members principally in the area of science and technology.

INASP sponsored two series of three-day training workshops in Latin America in 2010 and 2012. It also sent consortium leaders from Bolivia, Cuba, Honduras and Nicaragua to the 2011 IFLA ARL/LAC pre-satellite conference in Guatemala attended by 44 institutions representing 17 countries. At the completion of each series of workshops, a report was prepared highlighting specific activities and novel services developed within the country.

The partnerships between eligible countries and INASP work toward activities being led, implemented and sustained by the countries themselves. There are some Creative Common open source services shared among many academic libraries and research institutions. Most provide access to digitized scientific journal publications (SciELO[4], Latindex[5], LAMJol)[6] and e-books (ElLibroTotal.com)[7]. Cybertesis[8] provides free access to student theses for many Latin American countries. Each of the above electronic indexing services was developed in Latin America and provides Spanish language material. The advantage was that they could be ultimately linked for multiple nations to learn and produce more scholarly research. Arguedas (2001) predicted the positive impact the Internet will have on promoting access.

Some statistics

Imports of new titles into Latin America exceed exports and concern has been expressed about book piracy in Latin America (Greco, 2008). In 2006, CERLALC reported 99,566 new titles published, increasing to 302,199 in 2014 (CERLALC, 2014).

Electronically accessible database collections require some infrastructure such as a reliable power source, network connections, sufficient bandwidth and basic training to conduct a search. Sustainable funding was provided by various ministries within the countries reviewed; the Ministries of Culture, Education, Science and Technology were the most frequent supporters. Other government services common in all Latin American countries for the study of commerce and industry were very interested in supporting developments. Over 100 library and university administrators attended the INASP workshops representing 66 institutions. In the INASP countries, major research tools of online databases such as Elsevier, Wiley, ProQuest, Springer and EBSCOhost were provided with an initial three-year license from 2008 to 2011 and EBSCOhost was extended to 2014. Nicaragua witnessed an increase of usage from 2,788 documents downloaded in 2008 to 22,565 in 2010. Downloads in Nicaragua increased dramatically from 6,079 in 2008 to 219,168 in 2010 (Gomez, 2012). Scientific journal articles were retrieved at a significantly higher level in 2008 at 58,000 downloads in Bolivia, then plateaued in the following years (Rojas, 2012). See Table I below.

Resources

International countries share resources developed by UNESCO. The four most popular being:

- 1 Health InterNetwork Access to Research Initiative (HINARI)[9].
- 2 Access to Global Online Research in Agriculture (AGORA)[10].
- 3 Access to Research for Development and Innovation (ARDI)[11].
- 4 Online Access to Research in the Environment (OARE)[12].

They have merged to work with Research4Life[13], which is a public–private partnership of the WHO, FAO, UNEP, WIPO, Cornell and Yale Universities and the International Association of Scientific, Technical & Medical Publishers. The partnership's goal is to help attain six of the UN's eight Millennium Development Goals by 2015, reducing the scientific knowledge gap between industrialized countries and the developing world.

The selected IFLA countries use UNESCO Research4Life services among others but language continues to be a barrier. Subject-specific services for health and agriculture have been created by networked cooperation in some of the countries and free search services such as Google Scholar in languages

Table I Downloads in four Latin American countries

Country	2008	2009	2010	References
Bolivia	58,000	31,400	31,600	Rojas (2012)
Nicaragua	2,788	13,188	22,565	Gomez (2012)
Chile	1,896,299	2,221,831	2,336,716	Calderon (2012)

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used in Latin America such as Spanish, Portuguese, French, Italian and some indigenous languages such as Nahuatl and Quechua are also used. In addition, the technology to access information has adopted mobile devices to simplify some of the barriers with consistent power and physical access to computer workstations.

There are other information providers. Countries with weak infrastructures or low bandwidth use software developed for workstations such as TEEAL, The Essential Electronic Agricultural Library[14] and the journal *TropIKA.net*[15]; research on infectious diseases is supported by UNICEF/UNDP, the World Bank and WHO.

Digitization projects

International organizations have contributed to multi-national resource networking activities. The following collections are designed to encourage scholarly content contributions and sharing in Spanish.

- 1 Journals:
 - LAMJOL[6]: Latin American Journals Online starting with access to 25 Latin American journals in 2012 is a database published in Nicaragua and Honduras, covering the full range of academic disciplines. LAM7OL provides full text articles, an alerting service, author information, citation formats, indexing, sorting for other works by an author, definitions and articles related to the same topic and promotes their visibility. Journals Online[16] is the result of the partnership of INASP, the Public Knowledge Project (PKP) and CrossRef. PKP developed the Open Journals System - a system for groups of journals to publish on community Web sites. This not only enables international access and visibility, but also provides journals with an online peer-review system.
 - Latindex[5]: Latindex began in 1994 and was created as a system of information for scientific research and cultural journals published in Latin America, the Caribbean, Spain and Portugal with the cooperation of 17 national resource centers. Latindex provides journals and promotes scholarship to national and international communities. The aims of Latindex are disseminating, fostering and developing both the scientific and the editorial fields. Additional support for the development has been provided by the partners and supported by UNESCO (Science Sector - Paris and regional Montevideo offices), the International Council for Science (through ICSU Press and COSTED), the Third World Academy of Sciences (TWAS), the Organization of American States (OAS) and the International Network for the Availability of Scientific Publications (INASP). Latindex provides links and access to media, search engines, Web cams, heritage resources, leisure, employment, finances and dictionaries.
 - Redalyc[17]: The Red de Revistas Científicas de América Latina y el Caribe, began in 2002, now provides access to 620 open-access scientífic journals.

- All articles are available full-text, supported by the Universidad Autonoma del Estado de Mexico.
- SciELO[4]: The Scientific Electronic Library Online (SciELO) began as a regional open-access initiative with eight participating countries: Argentina, Brazil, Chile, Colombia, Cuba, Spain, Portugal and Venezuela. It was started in 2002 in Brazil by the Fundación de Apoyo a la Investigación del Estado de Paulo[18] and Biblioteca Regional Medicina[19]; SciELO is supported by the Latin and Caribbean Center of Scientific Health Information and other national publishers. It contains statistical indicators of use and impact analysis of scientific literature and journal evaluation based international standards. The full text is enriched with hypertext links to national and international databases, such as MEDLINE and LILACS. SciELO can perform searches for information on all available collections, either regionally or within a particular country. SciELO is the only Latin American source which is breaking barriers to entry into global access for published material. A cooperative venture with Thomson Reuters was established in 2012[20]. SciELO and Latindex are independent projects developed to organize and make retrievable sources of content with bibliographic contributions from the region. As of June 2014, SciELO published more than 1,100 journals, with just under 490,000 journal articles from 17 countries.

2 Books:

 El Libro Total[7]: makes available classic Spanish literature selected by country with added features to highlight text selections, audio function for pronunciation and software download for course instruction.

3 Dissertations/Theses:

Cybertesis[8]: sponsored by UNESCO and Fonds Francophone des Inforoutes also received cooperation from the Université de Montréal, the Université de Lyon, the University of Chile and 32 other universities of Europe, Africa and Latin America. It allows simultaneous searches through a single Web interface, and to retrieve more than 50,000 full-text theses stored in 27 different servers and university repositories, by means of the use of OAI protocol as a service provider (metadata harvesting). Theses from many Latin American universities are freely provided. Cybertesis promotes the publication and dissemination of electronic theses in universities, implementing international standards for digital publishing. Specific institutions can be selected and searches within countries can also be made. Thesis research is very popular, as the average use of Cybertesis is about five searches per thesis. Some theses include video clips from the thesis advisor as well as the author to describe difficult concepts in a visual way.

International connections

All the resources noted above depend on the support of many international organizations. However, CLADEA[21] is an exception. The roots of this 50-year-old organization are in a project focused on improving knowledge in the field of

management. CLADEA seeks to promote research and provide bibliographic support. Members share journal articles often delivered within 24 hours. The international level of cooperation is between directors and scholars from 200 institutions. CLADEA facilitates discussion and sharing knowledge on management issues. In addition, services and products to facilitate the exchange of information help to optimize costs and shared benefits. Ongoing training is provided to members in different areas of library management, and CLADEA has established contacts and cooperation with similar organizations in other continents.

Institutional repositories

- La Referencia[22]: La Reference manages to integrate metadata provided by the member countries thanks to an international protocol called OAI-PMH. Originally funded by the Inter-American Development Bank (IDB), La Referencia is continuing on a second phase of growth via RedCLARA. The Red de Cooperacion Latino Americana de Redes Avanzadas (RedCLARA)[22] is the enabling networking infrastructure across Latin America of virtual research and educational facilities. RedCLARA initiated La Referencia, a network of repositories from Argentina, Brazil, Chile, Colombia, Ecuador, El Salvador, Mexico, Peru and Venezuela. The highest number of repositories, listed on the Directory of Open Access Repositories [23], are in Brazil, Argentina, Chile, Colombia, Ecuador and Peru, with approximately 121 repositories not pertaining to SCIelo, Cybertesis or La Referencia. Technical standards and metadata are very important for a successful repository network. National repositories are improving significantly due to the adoption of common technical standards. The technical group agreed on the strategy to adopt Driver 2 Guidelines[24] to implement the pilot of La Referencia. Others followed a strategy of adapting and updating their own guidelines. The main objective of La Referencia is to provide open access to the regional scientific production, through a federated network. Some specific objectives are to:
 - make visible and to maximize the use and impact of the scientific production of Latin America;
 - set standards and best practices for preservation, quality and interoperability in information retrieval;
 - increase the visibility and the access to scientific production, both on the national and international level;
 - mitigate the cost of scientific journals in universities and technological and scientific organizations;
 - promote the development of open access repositories;
 - consolidate operations and disseminate best practices in technical, institutional and public policy.
- Alice2[25]: Alice2 continues the program of Alice by maintaining and developing the network infrastructure of RedCLARA for the provision of a continuous, inclusive and persistent environment for electronic collaboration for research and education within Latin America and with emphasis of supporting a higher education collaboration space between Latin America and Europe.
- ECLAC: The Economic Commission for Latin America and the Caribbean[26] began in 1948 and launched its

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repository in Lima, Peru, in May 2014. The objective is to provide a single point of access to more than 35,000 digital publications. All documents are available in full text. Long-term preservation is assured. The repository will store final legal versions of documents and those for which ECLAC has copyright.

Project management

Strong leadership is the key to strengthen and communicate the desire for cooperation, and as a result, resource sharing should become less a battle of ownership and individual pride. Ruth Velia Gomez, a consortia leader in Nicaragua, provided the best practical and inspiring statements for library consortia development. "One needs to take the aggressive belligerent role to meet the requirements of leadership with library consortia".

Libraries are not isolated. They coordinate activities, share resources and participate within associations and consortia. Yet many of the global international indexing services [unintentionally] include scholarly production primarily from the northern hemisphere. A timely rebuke (Alperin, 2014) exposed this bias in the major indexing services such as EBSCOhost, Elsevier, Springer and Wiley. The absence in international rankings means the rigor and scholarship in Latin America is not recognized. It means authors in Latin America are not cited, despite their scholarship. It means accreditation academic institutions will never reach requirements or attain comparative ranking for their contributions to the scholarly community.

Copyright and trade relations impact on Latin **America**

Copyright supports the infrastructure requirements for research and scholarly production. The Trade-Related Aspects of Intellectual Property Rights (TRIPS), copyright sections [27], are under revisions by the World Trade Organization (2014) proposing elimination of exceptions for least developed countries. However, the Electronic Information for Libraries (EIFL)[28] is dedicated to enabling access to knowledge for education, learning, research and sustainable community development through libraries in more than 60 countries and is supporting the continuation of a waiver for developing countries. Developments in technology and industry require the creation and nurturing of R&D by a quality education system which in turn is dependent upon access to global information resources and learning support services provided by academic and research libraries.

The World Intellectual Property Organization (WIPO), on May 3, 2014, was caught in a surprise action by the European Union (EU). The Standing Committee on Copyright & Related Rights (SCCR) broke down after the EU attempted to block future discussion of copyright laws to aid libraries and archives to fulfill their missions in the digital environment. IFLA's response[29] focused on challenges for libraries providing access to their collections across country borders, to foster international research, scholarly collaboration and cultural preservation. Brazil, Uruguay and the Group of Latin American and Caribbean Countries (GRULAC) stood firmly against the EU during discussions (Brungs, 2014). In doing so, IFLA included in its response further content related concerns

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for developing countries – Linking and browsing (pp.11-12); Limitations and exceptions in the Single Market (pp. 21-27); eLending (pp. 36-39); Text and data mining (pp. 54-55); and the Internet intermediary responsibilities (p. 76).

Some countries have erected trade barriers via tariffs without any exception for educational purposes. Thus, in Peru, to access some of the major databases such as Elsevier, libraries must pay an additional tariff, as high as 40 per cent. Elsevier has avoided the tariff by establishing a small office in Peru, making their content more affordable. There are widely held principles of copyright exceptions, including the First Sale Doctrine, fair use (USA), fair dealings (UK) and responsible use (China) for interlibrary loan (ILL) activities (Beaubian et al., 2011). International disputes remain over licensing and whether there can be:

- cross-border ILL deliveries;
- direct digital ILL delivery to end-users;
- delivery to library walk in patrons in any format; and
- no need for libraries to exercise due diligence (Kelley, 2011).

Libraries have a public mission, often governed by statute, to enable the advancement of knowledge necessary for educational, scientific and development purposes including across territorial borders to complete the promise of the digital age. In developing countries, students and scholars often rely entirely on the university library to provide learning and research materials needed for their courses. Copyright law regulates access to such knowledge-based goods. Copyright is a core issue for libraries because it governs the acquisition and lending of materials, such as the price and availability of books; the ability to purchase books from abroad; the costs of licensing electronic resources; and interlibrary document supply. Copyright underpins essential library functions, including digital preservation; copying for research and private purposes; serving people with disabilities with accessible format copies and results we can only yet imagine with text and data mining.

In support of EIFL's efforts[30], the impact of stronger trade protection and copyright enforcement will reduce access to knowledge-related products in developing countries, with potentially damaging consequences for poor people. Least developed countries, classified by the UN, and quantified by the IMF[31] as the most impoverished and economically vulnerable countries, face human, financial and technological constraints. TRIPS Agreement aids the development of domestic technological and creative capacity. Developing countries must be allowed to craft copyright systems, including exceptions and limitations, to suit their own economic, social and technological conditions without the threat of trade sanctions used by trading partners to enforce TRIPS obligations. Scarce resources should be used to develop essential services, including investment in education and well-resourced libraries.

Latin American countries participate with the Berne Convention on copyright but may not have a national office to serve as the official Register/registrar of copyright. Of particular importance is the translation of foreign works. Purchasing books with limited budgets, limited storage or other space for libraries and time-consuming lending practices all lead to preference for mobile and electronic access. The priorities for food, health and shelter and an increasing need for personal safety. Because of this, an information policy for developing nations will depend on

international projects such as WIPO. Thus, non-affiliated nation states, for example the European Union, may continue to dominate information politics and policies for libraries. On other fronts, actions such as the French COUPERIN license agreements with Elsevier, which has been made public, is of benefit to countries seeking to negotiate with large commercial vendors (COUPERIN, 2014).

Rankings of publications often omit scholarly production from Latin America. This, in turn, impacts rankings of institutions for research and higher education. Internally, librarians are not given frequent conversations with their institution's key faculty and administrators. This author's experience has seen library directors as appointees of the institution who may not be advocating for the library as an equal partner in the educational mission of the college. Though delivering quality instruction is an important goal, demonstrating unique value and positioning the library for the future may not.

Many states and, therefore, citizens must adapt their processes and efforts to the applications available (and, hence, to the multi-nationals who design these applications). How do the states or the people manage their own data if it is unknown how the systems work? How can those who produce scholarly works be sure they are used without any dark purpose? How to ensure countries control ownership of public data and systems? Is there a realization of the importance of technological sovereignty? How can nations assure citizens that they are fulfilling moral obligation, ethical and legal efficiency to manage resources if they have no control over them? (Ramon, 2012). The Chilean government is very inclusive of its indigenous population and provides documents relevant to their lives in their native language.

Current discussions with WIPO on agreements for libraries with publishers impact the international arena. In responses to the draft of the IFLA Draft Treaty on Exceptions and Limitations for Libraries and Archives, the International Association of Scientific Technical and Medical Publishers (IASTM) surmised that copyright for libraries internationally was uniform and, hence, can be resolved by international agreement. Unlike other international organizations, the IASTM does not distinguish between stages of development, types of libraries or legal traditions. The IASTM does realize some clauses do venture into areas outside copyright law, such as licenses, contracts, common and civil laws. The current trend will lead to more negotiation centered on license agreements rather than copyright.

Literacy

The dominant culture may create barriers to continued growth of native language by omission in schools and society. Indigenous languages may still be spoken in homes, social and religious gatherings. Some dominant cultures wisely retained native languages to learn possible secrets and as a safeguard to protect from revolt. Chile provides government forms in indigenous languages to preserve cultures and support their development. Guatemala in 2011 discovered the 23rd indigenous language from within its own country. The Rieken Foundation is working with the indigenous communities of Honduras to write native language books to record lore for Downloaded by TASHKENT UNIVERSITY OF INFORMATION TECHNOLOGIES At 23:16 31 October 2016 (PT)

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future generations. Lor (2011) has dedicated research on the loss of indigenous languages.

Conclusion

The summary of activities in some countries of Central and South America is that the resources developed have included the need to sustain services beyond current funding but to guarantee the success, further senior management buy-in and other research agency involvement is needed. The Ministries of Culture, Education, Science have dedicated considerable support but there are further requirements for wireless access, increased bandwidth and infrastructure. These needs must be recognized by each nation's economic development agencies. Further support will continue from national or multi-national efforts, network infrastructure across regions and by embracing the first priority – technology. Latin America has applied and embedded innovative approaches. Many are embracing the future and taking steps toward stronger links to other peer initiatives.

Language, libraries and universities took centuries to develop cooperative benefits for scholarship and teaching. Today, the relationship between libraries and academic institutions continue to provide scholarly resources for teaching and learning and to advance knowledge and cultural appreciation. Advances in technology and economics have furthered resource collaboration, but the models of delivery, the variety of new electronic devices, interaction and access have changed. This has replaced the relatively stable period of sustainable and mutually compatible works, such as the printed book, newspapers and journals.

New electronic systems have provided the gateway to a rapidly expanding universe of information. Telegraph, telephone, radio, television and dial-up modems in the 1970s; World Wide Web of the 90s; and satellite, WiFi, mobile, satellite, etc., have freed restraints on border crossing and "omni-access" for a growing creative collection of information tools such as apps, Facebook, Twitter and Instagram, among others yet unimagined. The new mobile and global interactions provide support to IFLA's noble efforts of achieving freedom of access for all – Latin America being one of the areas of the world that needs that most.

Notes

- 1 www.cbues.org.sv
- 2 http://usi.earth.ac.cr/conbiucar
- 3 www.udea.edu.co/portal/page/portal/bibliotecaSistema DeBibliotecas/ElementosdeDiseno/Documentos/ Documentos/Istecliblink.html
- 4 www.scielo.org
- 5 www.latindex.unam.mx
- 6 www.lamjol.info
- 7 ElLibroTotal.com
- 8 www.cybertesis.info
- 9 https://extranet.who.int/hinari/en/journals.php
- 10 www.fao.org/agora/en
- 11 www.wipo.int/ardi/en

- 12 www.unep.org/oare
- 13 www.research4life.org
- 14 www.teeal.org/
- 15 http://journal.tropika.net/scielo.php?script=sci_serial&pid=2078-8606
- 16 www.inasp.info/en/work/journals-online
- 17 www.redalyc.org/home.oa
- 18 www.fapesp.br
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