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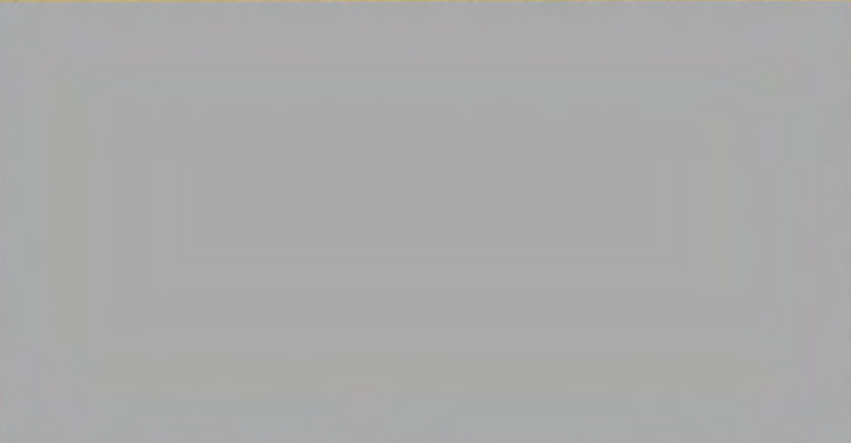


THE WORLD BANK
Washington, D.C.

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Zlatich, MARKO - ARTICLES and Speeches (1969 - 1979)



The World Bank Group
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July 28, 1969

Draft Statement to be Read by Marko Zlatich, World Bank Group Observer, while attending the 2nd Session of the UNESCO International Advisory Committee on Documentation, Libraries and Archives, Paris, August 19-22, 1969

Mr. Chairman, I have the honor to report on the activities of the World Bank Group which relate to the UNESCO Programme for Libraries, Documentation and Archives.

Introduction

1. The principal objective of the affiliated institutions comprising the World Bank Group (IBRD/IDA/IFC/ICSID) is to financially assist the economic development of their member countries and so raise the standards of living of the peoples of the world. Our interest, therefore, in libraries, documentation and archives is mainly that of a prodigious consumer of such services. Out of deference to the traditional confidential relationship between borrower and lender, we must restrict outside access to our own library, documentation and archival facilities. However, the following description of those aspects of the work of the World Bank Group which affect the development of library, documentation, and archival services in our member countries and a short summary of the Bank Group's internal arrangements with respect to such services, is submitted to indicate the degree of Bank Group support for the aims of this Committee.

Assistance to Libraries in Member Countries

Economic Development Institute Package Libraries on Economic Development

2. In 1961 the Economic Development Institute of the International Bank for Reconstruction and Development assembled sets of approximately 200 books, reports, and reprints dealing with economic planning for donation to developing countries. Earmarked for selected specialized libraries of government

development agencies and libraries of university faculties of economics, some 125 sets in English, 210 in French and 210 in Spanish were collected with financial assistance from the Rockefeller Foundation and the Inter-American Development Bank. Stock of these original sets is now exhausted; however, since 1967 there has been a continuing program for distribution of yearly supplemental libraries. Consisting of some 15 to 30 new titles, these supplementary libraries are chosen by the faculty and lecturers of the Economic Development Institute and are sent out to original recipients of the basic library to additional depositories who have expressed interest subsequent to the distribution of the basic library. As of July 1969, 187 supplemental sets in Spanish have been distributed to 22 countries (mostly in Latin America), 146 in English to 71 countries, and 170 sets in French to 69 countries.

Financing Education Projects

3. The Bank ascribes a high priority to the financing of projects which will educate and train manpower required for economic development. Primary attention is given to technical education and vocational training, secondary education, and teacher training.
4. In accordance with its general lending policy, the Bank Group usually finances only a portion of the total capital expenditures for education projects. Normally included under such costs are buildings and equipment of which libraries and books are frequent components. To date, however, no library or documentation facilities have been financed which are not part of a larger educational complex such as a school or a teacher training college. Nor, does the projected Bank lending program forecast any future loans exclusively for such facilities.

Unpriced Publications

5. Any institutional library in the world may place itself on the mailing list for IBRD/IDA/IFC/ICSID gratis materials. Such publications consist mainly of press releases announcing loans, credits, grants and project assistance; speeches of principal officers, annual reports, and public information pamphlets.

Priced Publications

6. An extensive exchange program with developing countries is maintained both for UN and specialized agency offices on a regional level and such developmental institutions as development finance companies and university faculty libraries specializing in economic development.

7. A special complimentary mailing list generally restricted to institutional libraries in developing countries is maintained for the receipt of the Occasional Papers monograph series. Inaugurated in 1966 and now amounting to seven titles, this series is prepared in the hope that some of the research work formed within and for the Bank and its affiliated organizations may be usefully shared with others in the field of economic development. The monographs reflect the opinions of their authors only and are intended to stimulate further research. Originally published in English, translations of selected titles into Spanish and French are made in order to achieve wider readership. Libraries in developed countries are referred to the book trade for this series as well as other priced items prepared by the Bank Group.

8. To date, no comprehensive catalog of World Bank Group publications has been prepared. Lists of currently available sale and gratis publications may be obtained from the Bank Group Department of Information and Public Affairs.

Documentation

Economics Department Catalog of Studies

9. The Economics Department of the World Bank Group distributes internationally on a selective basis a Catalog of Economic Studies produced by the Bank (this catalog was formerly distributed quarterly under the title "Status of Studies"). The catalog will be issued in an initial version and semi-annually updated. It is sent to organizations and institutions which have economic research interests in common with the World Bank Group. The Economics Department of the Bank controls both the circulation of the catalog and the distribution of the studies listed therein.

Archives

10. Assistance to archival facilities of member countries would not ordinarily be within the scope of the Bank's lending operations.

Internal Documentation, Library and Archival Facilities

Documentation

11. The World Bank Group collects documents on economic development and related subjects from governments, international agencies and research institutes the world over. These are deposited for reference use in the Bank's Research Files which is a documents collection established solely for staff use. Restricted to items of current importance in administrative support of the Group's daily economic, financial and technical operations, this collection consists of some 250,000 pieces arranged for manual retrieval in geographical-subject order.

12. Aside from those prepared specifically for the general public, documents prepared in the World Bank Group are normally for internal use only. However, an arrangement exists for the regular distribution of certain classified economic and project appraisal reports for the exclusive use of the staffs of those international agencies which have economic development objectives in common with the Bank.

Libraries

13. The Joint Bank-Fund Library which is operated jointly with the International Monetary Fund, has a collection of over 90,000 catalogued volumes in some 30 languages. It receives over 2,600 periodical titles, 140 newspapers and some 10,000 serials. Its collection is strong in economic development, particularly banking and finance, economic planning, foreign trade and statistics. Use of the Joint Bank-Fund Library is largely restricted to staff of the two organizations and to qualified outside users upon approval by the Librarian.

Archives

14. The Bank Group Archives, which are inviolable in accordance with the Articles of Agreement by which the Bank was established, are available for use by World Bank Group Staff only.

Zlatich

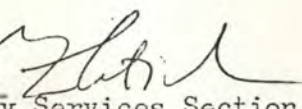
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INTERNATIONAL SYMPOSIUM ON DOCUMENTATION
OF THE UNITED NATIONS AND OTHER
INTERGOVERNMENTAL ORGANIZATIONS

Geneva, 21-23 August 1972

"ACQUISITION AND ORGANIZATION OF INTERNATIONAL
DOCUMENTATION WITHIN THE WORLD BANK GROUP"

by

Marko Zlatich 
Chief, Research Files and Library Services Section
Records and Communications Division,
International Bank for Reconstruction
and Development

1. Before I begin the discussion of how the Bank acquires and organizes international agency documents, a word about the importance of such materials to this group of affiliated financial institutions would perhaps be in order. Of the 110,000 newspapers, books, documents and other pieces of informational paper the Bank's library and documentation services received and processed from outside sources during the calendar year 1971, some 65 per cent were produced by the international agencies constituting the United Nations family. According to demand-use patterns, international agency documents can be shown to play a leading part in information retrieval: in 1971 Research Files and Library Services Section, which provides documentation services to World Bank Group staff, received 10,377 enquiries, of which 4,372 were for documents or for information contained in international agency (OECD included) materials. Thus, international agency documents not only provide a significant data base for the staff of the World Bank Group but also constitute a substantial work-load factor for our service facilities which must discover, acquire, accession, index, store and retrieve them to fill or anticipate user needs.

I. ACQUISITION METHODS OF THE WORLD BANK GROUP

A. Inter-agency Agreements

2. The bulk of documentation produced by the agencies which is of use to the Bank Group is systematically received under the terms of standing inter-agency exchange agreements governing the distribution of documents for information purposes among the several international agencies. Over the years, this system has proven to us a highly satisfactory means for obtaining the majority of needed documents in the shortest possible time and at minimal overhead expenses - for recipient as well as sender.

3. If any criticism might be ventured at this point, it is that the receipt often lags behind the demand for certain documents. This is no doubt attributable to use of surface mail to deliver the bulk of documents issued. We are grateful then for the co-operation of those distribution services which promptly respond to our requests

for air dispatch of priority documents. We have, however, noticed a recent tendency among some agencies to refer our requests for non-distributed items or for titles needed quickly to a commercial dealer, i.e. UNIPUB, with the consequences of unforeseen delays in receipt as well as the imposition of a surcharge for documents, which, under exchange terms, we feel there is good reason to expect gratis. But, to date, no intimation of change in policy by any agency belonging to the exchange system, has come to our attention. Such unilateral actions indeed would seem counterproductive to the spirit of the Jackson report and other efforts now under active consideration to facilitate circulation of documentation needed to support development assistance activities to which effort most members of the system are devoting all, or nearly all of their resources. Indeed, such unilateral changes in exchange procedures might escalate into an exchange of retaliatory distribution restrictions which, in the long run, would only increase acquisitions costs for all agencies concerned.

B. Limited, Working Papers and Conference Series Documents

4. Documents not subject to the usual inter-agency exchange agreements are those issued in limited series, but which, paradoxically, we find are often the most sought after by our users. Normally, we receive notice of such documents only when the conference report is accessioned and the list of submitted papers is discovered in an annex. These papers are usually much more detailed than the conference report and the information or data they contain, usually at a country or microeconomic level, is in great demand by the Bank's economists, financial analysts, and statisticians. However, since this documentation is not routinely distributed through interagency channels, it is often necessary to request copies directly from the established agency distribution service. Unfortunately, by the time our request reaches the conference committee, it has either itself been dissolved or the stock of papers is exhausted. At times, we can obtain copies of papers from individual authors but only at the expense of additional delays in getting the needed information to our users.

5. While it must be granted that meetings are of primary benefit to the participants, it cannot be denied that, unless they are of the closed variety, the information they generate is basically intended for eventual, if not immediate, general dissemination.

6. A solution to this problem is suggested for consideration. Provided such a step will prove practical and reasonably cost-effective for the agencies concerned, any documents prepared in limited, working paper or conference series should automatically be microfilmed by the agency responsible for commissioning or convening the meeting or working party to which the papers are contributed. The microfilm masters could then be placed in the custody of the appropriate agency documentation or archival service for copy release, subject to whatever conditions may be appropriate in each case. The remaining problem, that of identifying such papers in the first place, is, of course, left to the skill of the professional documentalist or librarian.

C. Lists and Catalogues of Publications and Documents

7. Because the exchange system works so well in general, there is little need in daily practice to refer to agency lists and catalogues. Yet, this is not to say that they can be dispensed with. On the contrary, they are an essential concomitant to reference work. Except for those which succeed in identifying all or, nearly all, internal agency documents, we find, though, no particular advantage has accrued to date from the lists whose production is computer assisted.

II. SERVICING AND HANDLING INTERNATIONAL DOCUMENTATION

A. Documentation and Library Services within the World Bank Group

8. Traditional library services to the staff of the World Bank are provided by the Joint Bank-Fund Library which is administered by and is located in the International Monetary Fund. I shall not deal with this facility since it will no doubt be described in a paper presented to Panel III by its Librarian, Mr. Martin Loftus.

Documentation Services

9. Within the World Bank Group, documentation services are centralized in the Research Files and Library Services Section of the Records and Communications Division, Administrative Services Department. Briefly, the threefold functions of the Section are:

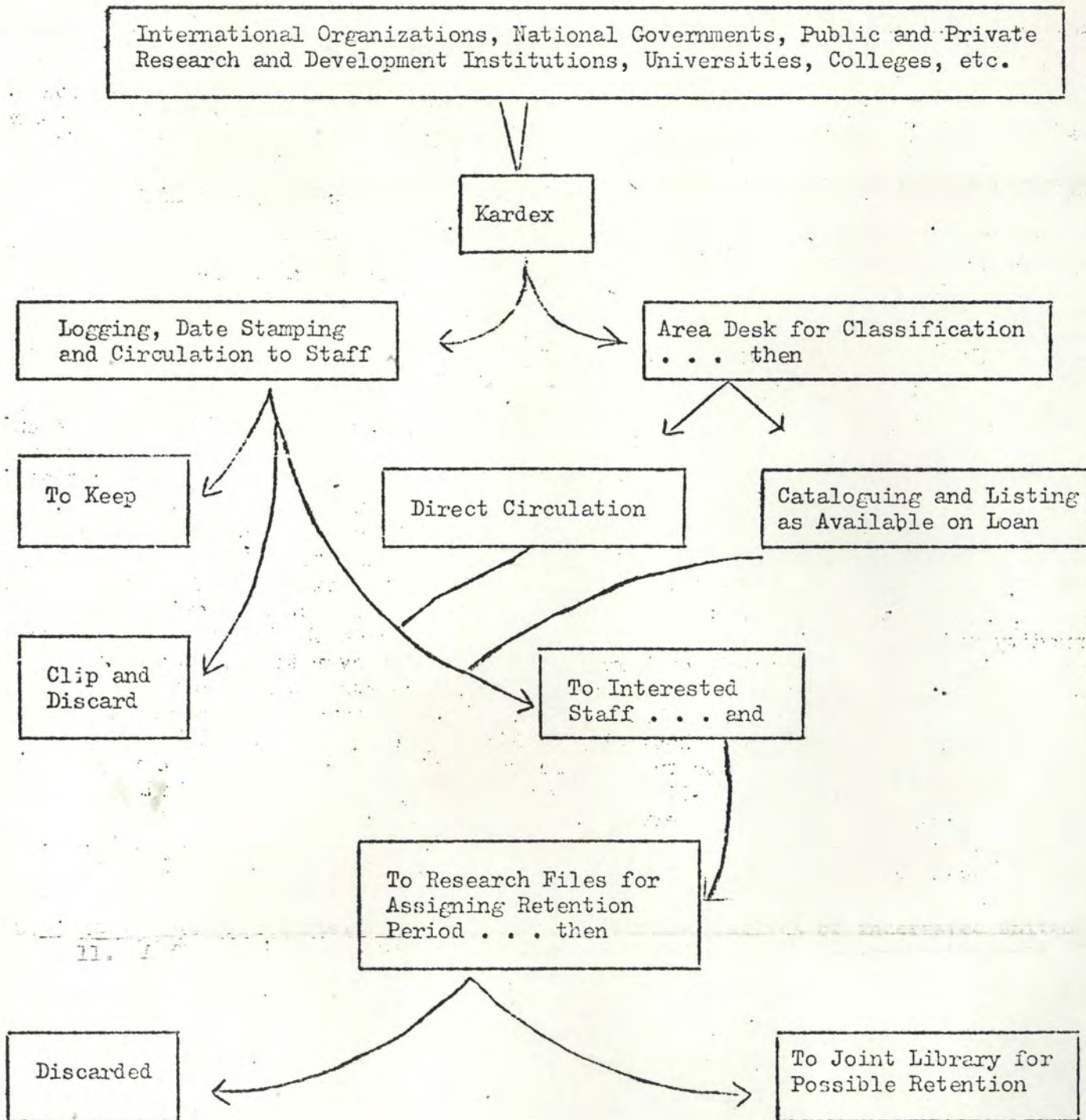
- First, to assemble relevant source data documentation and maintain research collections of such documentation.
- Second, to selectively disseminate recorded knowledge according to user needs.
- Third, to selectively acquire external materials in response to specific requests.

10. The types of materials handled by the Research Files and Library Services depend entirely upon the current information needs of the economics, engineering and other operational Bank Group staff. The common characteristics of this material is that it is current and ephemeral with a retention period rarely exceeding its demand use. Therefore, there is no attempt to build a retrospective collection. In-house, there is no recourse to automated indices, because, in effect, the file is self-indexed. Selected recent acquisitions are announced in a list circulated fortnightly to interested staff. Documents dealing with specified subject categories, such as commodity price statistics, are automatically circulated on the basis of pre-established user profiles. All storage is of hard copy because turnover time is too short to justify microfilming. Thus, in response to their requests, users receive actual documents rather than citations to literature. Direct browsing is encouraged but most requests are received telephonically. Files searches are manual but rarely require more than few minutes to turn up all materials we have on a given topic. Materials not in the file are solicited, as needed, directly from appropriate sources, such as the agency distribution services. Those books or publications that are accessioned for permanent use are either manuals, directories, yearbooks or texts. When no longer in use, they are either passed on to the Joint Bank-Fund Library or discarded.

C. Lists and Catalogues of International Documentation

11. A flow of chart of our documents handling procedure follows:

Figure I. Flow of Documentation
Records and Communications Division
Research Files and Library Services



B. Documents Processing Techniques

12. File arrangement of documents. Because of the nature of the needs of the client body, it was early determined that file arrangement of documents by symbol, by author and/or by title failed to retrieve their contents quickly or completely. Thus, retrieval largely depended on subject and geographic analysis. In 1949, a modified decimal system based on that employed for some years in the United States Department of Commerce Library was worked out to accommodate the classification of all types of documents dealing with the development sciences. It was found that international agency documents, other than those dealing with procedural matters or summary records of general meetings, would be easily accommodated within such a scheme. Accordingly, the classification scheme was extended to cover this type of documentation as well. Thus, each agency document is filed under the appropriate subject within the appropriate country or regional file along with all other documentation regardless of source or publisher, having the same classification.

13. The only exceptions to this rule are General Assembly and procedural documents. Since they are not normally called for by subject but by session or even symbol, this type of material is separated and filed by symbol until official records are received. At this point, we discard the mimeographed set while the official records are kept for permanent library retention. For agencies which do not print official records for procedural meetings, we simply follow a rule based on demand-use experience, purging this type of material biennially.

Classification Scheme for Documents used for Informational Purposes by the World Bank Group Staff

14. The classification scheme itself is a faceted system employing a 3-digit binary code ranging from 100-499 covering twenty-five major sector interests of the Bank Group. The general outline of the classification is the next Table . . .

Table I. Outline of Classification Scheme

<u>Topic</u>	<u>Classification Nos.</u>
General Information	100 - 110
Geography and Environment	111 - 119
Population and Family Planning	120 - 129
Government Administration and Services	130 - 149
Development and Development Planning	150 - 159
International Organizations and Relations	160 - 199
National and Natural Resources	200 - 209
Manpower	210 - 218
Agriculture, Forestry and Fisheries	220 - 229
Minerals and Fuels	230 - 239
Industry	240 - 249
Public Utilities	250 - 259
Transport and Communications	260 - 269
Construction Industry	270 - 279
Urbanization	280 - 289
Housing	290 - 299
National Finances	300 - 329

TopicClassification Nos.

Government Finances	330 - 349
Prices and Domestic Trade	350 - 359
National Income	360 - 399
International Trade	400 - 409
External Trade	410 - 419
Foreign Exchange	420 - 429
Balance of Payments	430 - 439
External Investment, Lending and Borrowing	440 - 442

15. Originally hierarchical, the scheme is now simply faceted due to the constraint imposed by the original range of class numbers with too much concentrated within the 200's. Any further expansion of our subject coverage by the addition of another major sector to the Bank's lending programme would compel us to consider an over-haul of the scheme. Fortunately, this has not been necessary to date. Major headings for Housing and Urbanization were successfully accommodated during 1971.

16. Our classification of international documents then is the simple selection of the appropriate class number added to the appropriate area or country designation. Documents such as the World economic survey are filed in what we term non-regional (macroeconomic) files but with the same classification number as would be used for a document covering a limited geographic area. Since the emphasis of the Bank has been on countries, the organization of our storage mode has followed suit. Arrangement by sector, cutting across geographic lines is a possibility and is being tried for technical, i.e. feasibility documents. But, from the point of view of staffing flexibility, the geographic basis has, to date, continually proven its adequacy to meet our needs. Thus, to retrieve any document the user needs only know its country and subject and, if it falls within our retention schedules, we do the rest.

17. Retention and disposition of reference documents. At the time it is classified, each document added to the file is coded with a symbol indicating its maximum retention period, method of disposal and terminal life year. Depending largely on the subject area of the document and to a lesser extent on its type (e.g. annual reports which are kept two years regardless of country) or geographic area covered (e.g. materials on USA are retained for one year) the retention periods vary from one to five years as given below:

Table II. Retention and Disposal Codes used in
Research Files and Library Services

- A - Keep three years (except Europe and USA for one year), then discard
- B - Keep three years (except Europe and USA for one year), then
Joint Library
- C - Keep until substituted, then Joint Library
- D - Keep until substituted, then discard

- E - Keep five years (except Europe and USA for two years), then discard
- F - Keep five years (except Europe and USA for two years), then
Joint Library
- G - Keep five years (except Europe for three years), then Joint Library
- H - Keep indefinitely (by special instruction only).

III. CONCLUSION

18. Internal Retrieval Improvement Plans. With respect to subject retrieval, we are working with methods which will increase access to the detailed contents of those international agency documents which cover more than one sector of a given country or which report on a single sector in a multitude of countries. We hope that current trials with filing cross references in the form of xeroxed copies of title pages and tables of contents will enable us to avoid the necessity of going on to more labour-intensive expedients such as annotation.

19. Although technically feasible, we have no tangible evidence that converting our manual methods to automated data processing would yield sufficient benefits to warrant the cost increase which such a conversion would entail. We feel that any major changes in our present procedures must await significant shifts in demand pattern, or from taking such fundamental decisions as whether to selectively decentralize our documents file, by bringing groups of documents in close physical proximity to their principal or sole users.

Zlatich

BROAD TERMS OF THE UNITED NATIONS SYSTEMS
REPORT ON THE WORK OF THE UNACC TASK FORCE
ON INDEXING VOCABULARIES

by
Marko Zlatich
World Bank

Submitted to the
North American Preparatory Seminar for the Second International
Symposium on the Documentation of the United Nations and Other
Inter-Governmental Organizations
Toronto, 20-22 June 1979

BROAD TERMS OF THE UNITED NATIONS SYSTEMS
REPORT ON THE WORK OF THE UNACC TASK FORCE
ON INDEXING VOCABULARIES

1. The history of interagency indexing efforts goes back over a quarter of a century. It is not the purpose here to cover the course of these efforts since a comprehensive essay on the subject has already been drafted by Mr. G.S. Martini, Dag Hammarskjold Library, for eventual publication in the Unesco Bulletin for Archives Libraries and Documentation.

2. In 1975 the Working Party on Indexing of Documents was revived by the Administrative Committee on Coordination (hereafter ACC) because of the increasing concern of governments and other organizations over the availability of information in the documents of the agencies of the United Nations System. The purpose of the Working Party was clearly stated by the ACC in a circular letter (Reference AD323/22 dated 20 August 1976) addressed to participants of the Working Party meeting held at New York 15-19 November 1976.

"...the exploration of primary means for making information in the documentation of the various agencies more widely accessible... by determining what information contained in documents might be exchanged, how they might be described bibliographically and what common indexing terms might be usefully employed."

3. In addition to certain standard bibliographic data elements, the Working Party agreed that the broad subject field and specific subject descriptors are mandatory for each document description. Recognizing the significance of an indexing vocabulary to the retrieval of documentation, the Working Party report CO-ORD/R.1197, p. 13-14, included the following recommendation:

F. Indexing vocabulary

It was recognized that effective retrieval of information required a high degree of compatibility and co-ordination of the terminology used by the participating organizations in the indexing of their documentary material.

It was further recognized that equivalent indexing terms in multiple languages were desirable.

For the purpose of developing full compatibility among existing indexing vocabularies, the Working Party recommended the setting up of an informal Task Force ~~comprised of~~ representatives of interested United Nations organizations and two or three terminology experts. This Task Force would:

(a) Make a comparative evaluation of existing general and sectoral thesauri from the point of view of their potential contribution to the needs of the United Nations system;

(b) Determine the best means of arriving at a thesaurus of broad terms reflecting all programme sectors of the United Nations system.

In that regard, the Working Party noted with interest that IDRC had awarded a contract to OECD to prepare during the period from 1 November 1976 to 31 October 1977 an updated version of the Macrothesaurus: A basic list of economic and social development terms. Therefore, the Working Party further recommended that the Task Force, in carrying out its assignment, would maintain close links with the OECD unit engaged in the revision of the Macrothesaurus.

It was agreed that the ILO would co-ordinate the work of the Task Force and provide the necessary link with OECD.

It was also understood that the Task Force would consult with all organizations in the United Nations system during the course of its work.

The work of the Task Force would be reviewed at the next meeting of the Working Party.

4. The question of evaluating existing thesauri, was dealt with in Paris, 28-29 June 1977, at the first meeting of the Informal Inter-agency Task Force on Indexing Vocabularies. The report of the meeting, circulated as CO-ORD/R.1229, 28 July 1977 contained a list of existing agency vocabularies, i.e. those of UNESCO, ILO, WHO, FAO and UNIDO. It was proposed that UNESCO, in view of its acknowledged leadership in the thesaurus field, would prepare a feasibility study for the establishment of a "Computerized United Nations Inter-Thesaural system of Indexing Terms employed by United Nations Agencies, with English and French Terms in parallel files." To date no report of progress has been received on this study.

5. In compliance with the Working Party's instructions, close links were forged between the Task Force on Indexing Vocabularies and the OECD/IDRC team working on the MACROTHESAURUS. On 9 December 1976, a number of Geneva-based agencies met with Mr. Jean Viet, the team leader. It was the consensus of this meeting that the work on the MACROTHESAURUS might incorporate the requirements of the Task Force. To that end, the MACROTHESAURUS team was to consult with individual agencies to try to "ensure that all of the agencies' needs are catered for...." A new edition of the MACROTHESAURUS incorporating some agency submitted changes, as well as others, was published in December 1978.

6. By the 17-20 January 1978 meeting of the Task Force, the agencies themselves determined that for the purposes of the broad terms list, the MACROTHESAURUS was too limited in scope in as much as it deals chiefly with the fields of economic and social development, while the UN system goes beyond these areas. Thus, the Task Force determined that the broad terms list should be compiled within the system from terms submitted by each agency. To accomplish the compilation, the Task Force approved the following recommendations as quoted from the meeting report COORD/R.2161:

a) All organizations of the United Nations system should draw up lists of terms that represent their current programmes and activities; the specifications for the submission should include the following basic elements.

i) The terms should be submitted in English and in other languages if available; the United Nations (Translation Division, Department of Conference Services) should be asked to establish equivalents in the various languages;

ii) The terms should be precise enough to fully describe the various substantive activities of each organization; the list should be restricted to activities at a sectoral and sub-sectoral level; for those organizations that operate on a programme budget basis, the list should include all activities at the major programme and sub-programme levels;

iii) Terms related to individual projects should not be submitted;

iv) Those organizations which have a thesaurus should submit the lists of broad terms in the structure already in use so as to facilitate the subsequent work of the technical team;

v) The preparation of the list should, as appropriate, be entrusted in each organization to the office responsible for indexing activities, in coordination with other relevant offices of the organization.

b) Collection and compilation of the list of broad terms submitted by the organizations should be undertaken by the IOB (i.e. Interorganization Board for Information Systems) Secretariat with the technical assistance of the ILO and UNESCO, the compilation to be in a form suitable for review by October 1978; in that effort the IOB Secretariat should take into account the parallel effort to revise the ACC programme classification.

7. Thanks to the energetic work of the IOB, the compilation of the agency responses to the canvas has gone through two manually prepared drafts. In each case the IOB secretariat circulated the complete drafts for agency commentary and correction. A Task Force review of the list took place under IOB sponsorship in Geneva, 22-24 January 1979.

8. The Geneva meeting recommended that the contributions of 27 agencies could be more useful if placed in a structured form, along the lines of the ACC programme classification. The meeting decided that the Broad Terms should be limited to descriptors, each term representing as far as possible a unitary concept. Terms which were originally submitted in the form of programme statements were to be converted into descriptors. Because some organizations had also submitted programme titles, acronyms and other names, a separate section identifying forms of name ("identifiers") was to be prepared. Some agencies also submitted terms of a generic type. Here too, a separate section will list such terms commonly used to cover general or administrative areas of activity.

9. Following the January meeting, the list of Broad Terms has been fully automated using ISIS programmes made available by the ILO and specially adapted for this purpose. The list is presently undergoing correction and slight amplification to make it ready for presentation to the Agencies in fall 1979.

7. Thanks to the energetic work of the ILO, the coordination of the agencies has