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“In the middle of difficulty lies opportunity”¹ - using a case study to identify Critical Success Factors contributing to the initiation of international collaborative projects

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Abstract

This paper aims to identify factors that contribute to the successful initiation of international collaborative projects that are intended to support the development of education for librarianship and information sciences. The paper, first, discusses the widespread failure to analyse the Critical Success Factors in international collaborative projects. It proposes case study methodology to identify these factors through an analysis of the decision by the European Commission's ALFA Programme to support REVISTAS, a study of the feasibility of digitising all the Spanish and Portuguese journals in the field of librarianship and information sciences, particularly those published in Latin America.

To contextualise the proposal, it discusses the development of the 'Information Society' in Latin America, and the key role attributed to libraries and librarians. It then examines problems that have been noted in the development of education and practice in librarianship and information sciences in the region, and in journal publishing for the profession, the availability of indexing and abstracting services, and the utility of document delivery services. It presents an outline of the author's initial research into the underlying challenges, and outlines the development of the international partnership that will deliver the planned outcomes of the REVISTAS project. Finally, the paper analyses the issues that have contributed to the establishment of this cooperative effort, and the limitations of this study.

Introduction

The College of Librarianship Wales (CLW), to whose anniversary issue this paper is a contribution, was established during a period when UNESCO and other international development agencies were providing substantial support for establishing or strengthening Schools of Librarianship and Information Sciences (SLIS) in developing countries [1]. A feature of the British Council's work in the 1970s was an increase in the 'exchange of persons' and, from the mid 1970s, 'Paid Educational Services', i.e. the marketing and management of British educational services as a self-funding activity, with the costs borne by the country concerned [2]. In its early days, the College's academic and library staff included numerous people who had either worked in libraries in the former British colonies or maintained an interest in international library development. CLW and its staff were thus involved in a number of international projects, with support from the British Council, UNESCO, the World Bank and other national and international development agencies. Among the more notable engagements were those with the University of the West Indies and the University of Jordan in the 1970s, and the Bayero University in Nigeria and the University of Indonesia in the 1980s.

International technical cooperation projects such as these tended then to be initiated by the funding agency, and were relatively short-term in duration because the agencies' commitment was determined

¹ Saying attributed to Albert Einstein

by the need to reconcile diplomatic pressures and priorities within their limited budgets. Perhaps as a consequence of the nature of the support, there is regrettably little evidence available to demonstrate whether or not this type of foreign assistance created the motivation and the critical mass of expertise in the beneficiary country that is required to sustain continuing development. In many instances it apparently did not, compelling Wormell to comment that:

“stories abound concerning development projects which commenced with a lot of enthusiasm and much excitement, but whose life span came to a crushing halt once the funding ran out, or the foreign facilitators left... [S]ustainability becomes a cliché rather than a reality.” [3]

Other reasons for the lack of evidence may be that, because the benefits were taken for granted, writing a critical account of the project for publication may have represented seemingly unnecessary additional work for the participants. There was certainly little evidence that they indulged in post-project reflection, analysis and evaluation. Few, if any, substantial reports of CLW's activities, written by its staff, have appeared in the public domain, and the activities tend to be noted only briefly in papers by others. For example, the only public reference to CLW's several years of activity in Indonesia appears to be a reference in a paper by an Australian educator [4]. Sometimes the involvement of CLW staff was overlooked in accounts written by local librarians who had themselves participated in one of the programmes and/or subsequently graduated from CLW, and this happened even in papers written for books edited by a member of CLW staff [5]!

This situation is not untypical, although others have been less reticent in reporting cooperative activities intended to support the development of SLIS. For example, Brewster [6] overviewed the whole of American assistance during a 30-year period. McGee [7] described a link between a Canadian university and the University of the West Indies. Evans and Treloar [8] reported on a link between an Australian institution and one in Papua New Guinea. Vodosek [9] described the collaborative activities of one German institution. Szerafin-Szabolcsi et al. [10] reported on part of a European Commission TEMPUS-funded project in Hungary undertaken by a consortium from Britain, Denmark, and Germany. Wormell [11] reported on an Anglo-Danish project funded by the European Commission in South Africa. However, the public accounts that have appeared certainly represent a small minority of the projects that have been undertaken globally.

International technical cooperation: aims and outcomes

The aims of these international technical cooperative programmes has tended to

“focus on a number of activities, such as the exchange of staff, usually intended to assist in the exchange of information and ideas about current practice, and sometimes supplemented by the provision of books, journals and other materials.” [12]

Amongst the claimed benefits of such cooperation are cross-fertilization of expertise and experience, and an increase in the effectiveness of the professional community. Johnson [13] has suggested that these are mutual benefits for all parties that include:

- Improved quality of teaching
- New opportunities for research
- Extended professional networks
- Additional funding
- Enhanced prestige and influence
- Improved access to publications
- Possible assistance in translating texts and/or interpreting their contextual significance
- Potential stimulus for change.

Kigongo-Bukenya [14] has, however, drawn attention to the fact that cooperative projects involving institutions from developed and developing countries are not always seen as a partnership of equals, and they sometimes appear to be based solely on a philanthropic paternalism that expects strong institutions to help the weak ones.

Research about international cooperation

Whilst these opinions may eventually be proved to be valid, they have not yet been tested by rigorous investigation, using recognised research methodologies, or supported by empirical data. Similarly, there is a need for objective investigation into how international collaborative activities can be successfully initiated, and how they can be implemented in a way that assures a sustainable outcome in the form of continuing development by the intended beneficiary School or Department. In this respect, they differ little from many other aspects of the discipline, even though it 40 years since Jesse Shera endorsed [15] an even earlier categorisation of the literature of librarianship which suggested that, regrettably, the reader would encounter

“Glad tidings, testimony and research, finding precious little of the last.” [16]

Circumstances have, however, changed. The first stage of any international project is securing the funding, but the budgets of the international development agencies have now, in many cases, been reduced in real terms, and political and diplomatic interests are always subject to change. SLIS wishing to participate in international collaborative activities are now more likely to have to initiate a request for funding themselves, and to have to submit a proposal in more obvious (although not necessarily more transparent) competition with other disciplines and institutions. The aim of this research paper is, therefore, to begin to identify the factors that underpin the successful initiation of such a project.

Whilst there have been generalised studies of academic cooperation [17], previous analyses of international cooperation in the library field have tended to focus on the barriers to inter-lending, which have been summarised as:

- *inadequate human resources to carry it out;*
- *insufficient funding to start or sustain it;*
- *poor telecommunications;*
- *copyright issues;*
- *insufficient knowledge of foreign regulations, policies etc.;*
- *negative attitudes or mistrust - reluctance to participate [18].*

Some of these may prove be similar to the barriers to other forms of professional cooperation. However, very little is known about the variables that contribute to the successful implementation of cooperation in the development of education for librarianship and information sciences (LIS), let alone their relative significance. Awareness of this limitation was acknowledged by Rodriguez who, introducing a conference paper on cooperative relationships between the United States and Mexico, explained that

“a study of greater depth would have to be made to cover, analyze and evaluate the results of that cooperation.” [19]

Although there may be more objective accounts in the archives of the sponsoring agencies and the participating institutions, most of the few other reports of international projects that have been published appear to have been intended only to publicise the activities. Large [20] has, however, made an initial analysis of the role of UNESCO as a sponsor for many of these academic links, while this author has begun to define the beneficial impact on staff development of participation in international cooperative activities [21], and to examine the reasons underlying the paucity of joint research activities in them [22]. Otherwise little progress appears to have been made since Brewster concluded her review with a recommendation that:

“An evaluation and qualitative measurement of these library development efforts, either on an individual project level, on a countrywide or regional basis, or on the basis of agency sponsorship appears to be in order... First, it is necessary to design a method or tool for the measurement and evaluation of these library development efforts.” [23]

The main aim of this study is to expose the factors involved in how an international collaborative research and development project can be successfully initiated. Any analysis of the relevant factors

needs to draw on a body of evidence, such as might usually be expected to be found in case studies. The case study is a recognised research methodology for underpinning theoretical propositions, and could be a valuable approach in beginning to identify the critical issues in this instance because

- *“It is concerned with a rich and vivid description of events relevant to the case.*
- *It provides a chronological narrative of events relevant to the case.*
- *It blends a description of events with the analysis of them.*
- *It focuses on individual actors or groups of actors, and seeks to understand their perceptions of events.*
- *It highlights specific events that are relevant to the case.” [24]*

Generally, previous collaborative projects in the field have not been reported in sufficient detail to permit the criteria for success to be elicited, and the authors of most of the published accounts have failed to provide any critical analysis and evaluation of their activities. However, this is also not untypical, as Yin notes:

“Unfortunately, ... Nor, in many instances, do case study reports end up in journals.” [25]

Yin [26] argues that qualitative research approaches such as case studies are, nonetheless, the preferred strategy for answering the ‘how’ and ‘why’ questions. By reviewing the stages through which activities have evolved, it is possible to establish ‘how’ development took place. Putting those activities in a broader professional context and in their national and international contexts makes it possible to understand more about ‘why’ developments took place. Identifying the ‘how’ and ‘why’ factors would be the first steps towards evaluating the eventual outcomes. Publishing a case study of a successful project bid should therefore contribute to a general understanding of what is admittedly a complex phenomenon.

The focus of this study, Yin’s ‘unit of analysis’ [27], is a series of activities undertaken by the author which culminated in a grant by the European Commission for a project involving staff of 7 universities from 6 countries. The paper outlines how the author prepared the proposal and assembled the international partnership that will deliver the planned outcomes of a current project (2003-2005) studying the feasibility of digitising all the Spanish and Portuguese journals in the field of LIS, particularly those published in Latin America. It considers first why the project was undertaken, discussing the political context in terms of the development of the ‘Information Society’ in Latin America, and the key role attributed to libraries and librarians. It then examines problems that have been noted in the development of education and practice in LIS in the region, and the changing mechanisms that have sought to address them. It notes the emergence of a new funding agency with potentially relevant goals, and the motivation that led to the formulation of a strategy for identifying the issues underlying the problems in the region that might attract support. An outline of how funding was assembled to facilitate the preliminary research that highlighted the problems of professional communication within the region as a significant contributor to the deficiencies in education and practice is followed by a brief review of the state of journal publishing for the profession, the availability of indexing and abstracting services, and the utility of document delivery services. Whilst this may be only a single case study of the various aspects of a current project, it nonetheless offers a sufficient range and depth of evidence to provide a rich picture for analysis.

Yin [28] identifies six main sources of evidence, all of which are brought to bear in this study. The author has had numerous opportunities both preceding and during the period to engage in ‘direct observation’ of education for LIS through site visits as well as conference participation in Latin America, and throughout the development of the project proposal was implicitly a ‘participant-observer’. The compilation of this paper required regular reference to the author’s ‘archival records’ of a number of projects. Other ‘documentation’, the results of a search for published literature, has provided a deeper insight into some aspects of the region’s problems, as has the examination of ‘physical artefacts’ such as the journals published in the region which provided an impression of the range and currency of the sources cited in the region’s professional literature. This has been supplemented by numerous semi-structured ‘systematic interviews’. Inevitably, a study of a successful grant proposal can only be related and analysed after the event. The gestation of the proposal that is the focus of this study took almost 10 years, and a wide variety of evidence has been assembled during

and after this 'prolonged engagement' to provide a form of 'triangulation' [29] that corroborates the author's notes and recollections. Given the passage of time, it has also been necessary for the author to engage in 'member-checking' [30], asking other participants to verify the accuracy of parts of this account.

The final challenge was to find an appropriate format for the analysis and presentation of the results. Rockart [31] first introduced the concept of Critical Success Factors (CSFs) as an approach to defining areas where high performance in information acquisition and use is required to achieve a goal, to resolve a problem, or validate an assumption. CSFs are an ideal tool for analysing factors relating to cooperation, because they are not a standard set of measures, but are related to the specifics of a particular situation. This means they must be tailored to the environment, as particular problems or opportunities arise. However, once they are explicit, priorities can be set more knowledgeably and improved allocation of resources, especially time, can be made. Subsequently these were categorised in 5 key areas [32]:

1. *The industry.* Each SLIS has a set of CSFs that are determined by the characteristics of the information sector in the country that it serves. Every SLIS in a country must pay attention to these factors.
2. *Competitive strategy and industry position.* Each SLIS is in an individual situation determined by its history and current competitive strategy, and this dictates some CSFs. For example, in a country dominated by a major SLIS, a CSF for all the others is understanding the leader's strategy and its probable impact. Similarly, the geographic positioning of the SLIS can also generate CSFs. For example, SLIS in rural areas may have agricultural information as a CSF, while this may be less critical for a SLIS based in a metropolitan area.
3. *Environmental factors.* Environmental factors are those areas over which a SLIS has little control. The SLIS must accomplish its mission while adapting to environmental changes. Obvious environmental sources of CSFs are government policy, fluctuations in the economy, and population trends.
4. *Temporal factors.* These are areas of activity within SLIS which become critical for a particular period of time because something out of the ordinary has taken place. Normally these areas would not generate CSFs. For example, the international availability of online databases created a demand for the incorporation of relevant teaching into the curriculum.
5. *Managerial position.* Each functional managerial position has a generic set of CSFs associated with it. For example, almost all Heads of SLIS are concerned with teaching quality, and with managing a budget.

The 'Information Society' in Latin America

For the purpose of this study, Latin America is defined as those 20 countries in the Americas south of the U.S. border and in the Caribbean where Portuguese or Spanish is the principal official language. Any understanding of the problems faced by library and information services in Latin America has to begin with an appreciation of the broader political context. Although National Science Councils in many countries in the region now have programmes to support the development of the 'Information Society,' it is debatable whether development is proceeding at the same pace in that region as in the industrialised countries in Europe and North America. Discussing a similar situation in another developing region, some senior information professionals have expressed a concern that:

"The Information Society is indelibly linked to information technology and technological innovation; therefore, to the extent that countries in our region are unable to access or afford the technology, they are unable to participate in the Information Society - many of our countries will always be second class citizens in this society, because they will always be technologically behind their Northern Hemisphere neighbours." [33]

In general, Latin America has a good record in matters such as constitutional protection for freedom of expression and intellectual property rights, but investment in ICT infrastructure has been much less than in the industrialised countries in Europe and North America. Whilst the region accounts for

about 6% of the world population, it has been making only about 3% of the global investment in IT [34].

According to information presented to the Rio Forum in September 2002 [35], Internet users did not then exceed 20% of the population, even in the most advanced countries in the region, compared with in excess of 40% in the European Union. However, an optimistic view of the situation had been presented in a report published the previous year that suggested that, although there would be only 44 million Internet users in the region by 2003, less than 10% of the region's total population, the Latin American market for online services would increase dramatically during the next few years [36]. Major initiatives to link libraries to the Internet and to create content in indigenous languages are expected to lead to significantly increased demand for digitised resources. In Chile, for example, support from a Presidential initiative to modernise the public services has enabled the national public library service to become the first beneficiary in the region of a project funded by the Gates Foundation to provide networked computers and related training activities [37]. The Brazilian government is also supporting a major Digital Libraries project [38].

In the burgeoning economies of Latin America, the demand for information is growing and changing, and information and library services are becoming - as they are elsewhere - more complex activities, requiring not only more advanced technology and increasingly large budgets, but also more effective management - and more sophisticated personnel. Recognition of these changes has been encouraged by the international development agencies. The United Nations Economic Commission for Latin America and the Caribbean has been particularly active, sponsoring a Programme for Information Management that was initiated by its Latin America Centre for Social and Economic Documentation (ECLAC/CLADES). This organisation was quick to realise not only the potential but also the implications of the Internet, asserting that the main responsibility for making progress rests with the information agents rather than with technologies [39].

Problems in the development of education for LIS in Latin America

If the use of information is to play a more significant part in social development in the region, library and information professionals must not only have well developed skills to help people to use the Information and Communication Technologies, but also the confidence to promote their use. However, information and library professionals in the region are generally being confronted with these technological and social challenges in a more dramatic manner than their counterparts in the industrialised countries, where similar developments have been gradually incorporated in a broad range of service provision over a longer period. Much will depend on the quality of LIS professional education, and the learning resources available to support teaching, research, and continuing professional development.

For the last 20 years, the relationship between the curriculum, the changing needs of society, and the job market for information skills has received as regular attention in Latin America as elsewhere [40]. The introduction of new ideas into the curricula of SLIS in Latin America has, however, often taken place with foreign assistance. For example, the American Library Association's Committee on Library Cooperation with Hispanic Peoples made its first report as long ago as 1921 [41], and a small number of Schools have benefited from assistance from USAID and the Fulbright programme [42]. UNESCO has also attempted to mobilise an educational response to changes in the professional environment, notably in Venezuela during the 1980s, supporting a regional model for the development of information science programmes [43], a project in which the author was briefly involved whilst at CLW. Assistance has also been provided by the British Council, for example in assisting the development of one of the SLIS in Peru in the 1980s, a project in which CLW staff [44] were involved with those from other British universities, and in Mexico, where the author attempted, unsuccessfully, to initiate a link with the Colegio de Bibliotecología, Universidad Nacional Autónoma de México [45]. Even more recently, the growth in the economy of Spain since its accession to the European Union, and the expansion in education for LIS in that country, has enabled its universities to begin to rebuild historic links with Latin America.

A new form of foreign involvement in education in the region has been the creation of secondary, local campuses such as, for example, the Bachelors degree programme in Information Studies recently introduced by the Florida State University at its campus in Panama [46]. Developments such as this may appear to go some way to meeting the demand for professional education (although Panama already had an established SLIS). Investigations suggest that LIS has been taught in over 80 universities in the region [47, 48]. The total may be closer to 100, although some of the programmes have been discontinued or may currently be dormant [49]. However, two-thirds of the SLIS are in 3 countries, and 2 of the smaller countries appear to have not yet established a substantive LIS programme at university level. In most of the other 15 countries in the region, there are only one or 2 SLIS. Moreover, those SLIS that exist are usually in the larger cities, and cannot easily service emerging needs for expertise in librarianship and information management in the vast hinterlands of many of the countries in the region.

Several approaches to resolving this problem have been tried [50]. Over the past 20 years, for example, there have been several national efforts to develop LIS distance teaching, with the earliest efforts reported in Colombia [51] and Argentina [52]. Further activity to stimulate LIS distance learning began in 1993, when a conference of educators from 12 Latin American countries was held in Puerto Rico specifically to discuss the potential for distance education [53]. This was followed by reports of initiatives in Cuba [54], Uruguay [55], Mexico [56, 57], Venezuela [58], and Brazil [59], some of them stimulated by the emergence of the new Information and Communication Technologies. Foreign assistance is now being offered to develop these new forms of distance education. For example, the University of Texas at Austin collaborated in the design of a web-based Masters degree which has been delivered by the Instituto Tecnológico y de Estudios Superiores de Monterrey in Mexico since 1999 [60].

However, imported solutions to the region's information problems have long been recognised as inappropriate because they have not taken into account differing cultural, social, and economic conditions. Gorman, Bowden and Fong have recently emphasised, more generally, that:

“socio-cultural evolution is firmly embedded in local societies and cultures. This is how development can be sustainable, by being fixed in the local culture and society, and not imposed from without, in the way that Western economic and technological values have been imposed on societies.” [61]

Over the last 20 years, concerns have regularly been expressed about the implementation in developing countries of development processes in which the objectives, techniques, content and outcomes are derived from the context and values of advanced industrialised countries. Awareness of these problems amongst information professionals appears to have been slow to develop. Although LIS educators from the United States had a significant presence in Latin America in the second half of the last century [62, 63], they seem to have taken some time to appreciate that

“to be an active partner in an international educational programme, there must be a willingness to internationalise the curriculum and mode of delivery...” [64]

Curricula imported from the U.S.A. into Latin American SLIS began to be openly criticised during the 1980s for failing to take into account differing cultural, social, and economic conditions [65], and curricular revisions to eliminate excessive American influence then began to be introduced [66]. It is therefore encouraging to note that, amongst the current generation of U.S. educators who are attempting to establish branch campuses or distance teaching programmes in Latin America, there appears to be a greater sensitivity to the fact that

“Intercultural and multicultural issues offer a challenge to educators... The challenges presented by these issues are necessarily multiplied when students and faculty have different linguistic backgrounds.” [67]

Culturally inappropriate curricula and isolation from centres of professional education were not the only factors impeding development. Nova Southeastern University in the U.S.A. offers both site based and online undergraduate and Masters Degree programmes in Latin America, including online doctoral degree programmes. Its library staff have found that

“collections at these libraries (i.e. NSU’s partners in the region) have not been sufficient to support doctoral research.” [68]

Participants in the Puerto Rico conference, in outlining the specific problems of developing programmes in their countries, also pointed inter alia to the problems of access to professional literature, and resolved to take advantage of the opportunities presented by new technologies [69]. Part of the problem has been attributed to the difficulties imposed by the economic, logistical, and linguistic barriers that restrict the cross-border trading of publications in the region [70, 71].

Originally, international distance education was promoted by American and British universities who expected their students to have a reading competence in English, although it was recognised that they might make use of material in their own languages to which they had access. In most professional disciplines, it seems imperative that they should be strongly encouraged to do so, to enhance their understanding and further their development. Research suggests that not only is language a considerable barrier to effective information dissemination, but that a

“major problem for students who are reading a foreign language text for content is the lack of background knowledge.” [72]

Now, some distance learning programmes in other languages are becoming available internationally across the Internet. This enhances the challenge for libraries, which will be expected to identify and facilitate access to relevant material in the language with which the student is most familiar:

“If libraries believe that all students served by an academic institution, no matter whether they are on or off campus,... are entitled [to] equal or equivalent access to library resources and services, then more work needs to be done to improve the level of those resources and services for international students.” [73]

ALFA and the development of the LIS profession in the region

International cooperation has its roots in promoting inter-regional understanding, as well as political and economic issues, and generally has an intergovernmental as well as a professional dimension, not least because government agencies tend to be the major source of financial support for technical cooperation projects. Since 1994, the European Commission has sponsored a programme called ALFA (América Latina Formación Académica) to facilitate the exchange of experience and collaboration between European and Latin American Universities[74]. The importance of this programme was emphasised by the selection of bi-regional cooperation in the fields of education and university studies as one of the priority areas identified by the multi-lateral meeting between officials from the European Commission and Latin American countries in Tuusula, Finland in 1999. The European Commission subsequently prioritised the development of the ‘Information Society’ in its programme of cooperation with Latin America [75]. The Commission recognises that one of the key actions to create a ‘User-friendly Information Society’ is the need for it to support projects intended to:

“improve the functionality, usability and acceptability of future information products and services, to enable linguistic and cultural diversity..., and to enhance education and training systems for lifelong learning.” [76]

Whilst the general aims of the Commission, and the specific aims of the ALFA programme, can be interpreted in a way that favours activities in the field of library and information sciences, it may be significant that the author’s RELACION proposal was the only one in the field amongst the 183 successful proposals submitted in the initial rounds of bids between 1994 and 1998. Since 1999, ALFA II has approved 197 projects, including only the author’s current project and one other proposal purely in the field of library and information sciences. This suggests that there is a need for librarians to have a better understanding of how to bid effectively for support for these international collaboration projects.

The conception of the project

The literature, and informal discussions with colleagues from the region, pointed to the need for new ways and means of both underpinning curricular reform in the SLIS throughout Latin America, including their distance learning programmes. Facilitating regular exchange of experience and continuing professional development also seemed essential if professional practice in the region was to develop on a basis comparable to that in the industrialised countries in the North. There clearly also existed a need for the development of university library services that would begin to break down the barriers to the development of an 'Information Society' in Latin America.

At the time that the ALFA programme was launched, the author was one of the senior elected officers of the International Federation of Library Associations and Institutions (IFLA), and aware that IFLA was keen to develop its presence in Latin America. As Chair of the IFLA Section on Education and Training, the author had already included in the Section's Workplan for 1992-97, inter alia, "organising technical meetings at appropriate venues throughout the world on the education and retraining of teachers of librarianship", the intention being to try to develop a global series of events similar to those that had led up to the London Colloquium in 1987 [77]. It is important to note that professional bodies such as IFLA may propose ideas such as these, but rarely have the executive resource to implement them. They depend on the continuing voluntary efforts of their individual members.

*Defining the underlying problems, and identifying feasible and fundable solutions, remained a challenge. The ALFA programme was targeting its support at teaching and research development as well as the management of services to the university community, and thus seemed an ideal vehicle for initiating the necessary activities. Project RELACION (**R**ed **E**uropea y **L**atinamericana en **C**iencias de la informac**I**ON) was the first attempt to analyse the issues. RELACION was a small project, led by the author, intended to explore with colleagues in SLIS in Latin America the problems that they faced in developing the professional workforce which the University libraries in the region required to enable them to modernise their services. Personal contacts in institutions in Brazil, Cuba, and Peru, identified from a variety of previous activities, agreed to support an application and to seek their university authorities' approval, and colleagues in 2 other European institutions also agreed to lend their support.*

While the ALFA programme does publish a brief statement of its annual priorities, it did not at that time publish its evaluation criteria, in common with many funding agencies but unlike some other European Commission programmes. This added to the challenge of drafting an acceptable proposal, and emphasises the need for the general guidelines which this study seeks to derive. The proposal was focused on the ALFA programme's then current priorities, stressed the author's previous experience in conducting similar reviews, and made clear the interest and support of other international agencies. Interviews with the staff of these prospective partners were proposed as a basis for identifying common themes and determining the most appropriate joint activities that might be undertaken. Nonetheless, the initial proposal, submitted in April 1995, was unsuccessful. The ALFA programme was in a formative stage, and the application form and programme guidelines were revised before the next submission deadline. However, following some adjustments to the proposal, the RELACION proposal was submitted again in April 1996. This was approved in principal, but some further revisions were required by the ALFA Programme Office. Problems in communicating with the partners prolonged that process, but the issues were finally resolved and a contract for a grant of up to €8,300 to cover the author's travel expenses was approved by the Commission in August 1997.

Further activities were simultaneously being undertaken by the author, enlisting the support of colleagues in the region connected to IFLA and FID to submit a bid for funds from the UNESCO Participation Programme for 1996-1997. In this, IFLA was joined by the former International Federation for Information and Documentation (FID), which had been a partner in the previous series of international workshops and which then had a stronger presence than IFLA in Latin America.² Whilst most UNESCO activities are proposed by the Organisation's officials in line with policy

² The FID ceased to function in 2000, and was formally declared bankrupt and closed down in 2001.

decisions by the General Conference and the Intergovernmental Programme Advisory Commissions, there is usually an opportunity in alternate years for member states' National UNESCO Commissions to bid for funds from the Participation Programme for projects that they wish to initiate. The Director of Information Services at CONICYT (the Chilean National Council for Science and Technology) was active in FID and a member of the UNESCO National Commission, and agreed to submit a proposal, prepared by the author, for funds for 2 surveys and a dissemination workshop. The proposal was deliberately couched in terms of UNESCO's then current policy objectives, and senior professionals in other Latin American countries were also prevailed upon to persuade their National Commissions to submit supporting letters to UNESCO, so that the proposal would be recognised as having a general and regional significance.

UNESCO subsequently agreed in September 1996 to fund the project as part of the Participation Programme, and a grant of U.S. \$25,000 was made available to IFLA for the author to manage. The author's ALFA-funded visits to the RELACION partners were still not subject to a firm contract, and it was therefore possible to arrange a diversion via Santiago de Chile for a meeting to plan the UNESCO-funded workshop. Whilst the air fare was covered within the ALFA grant, local costs for the visit to Chile were covered by the author's university. Rescheduling the visits to Latin America necessitated reaching agreement with the ALFA Programme Office to postpone the deadline for completing the RELACION project, but misunderstandings related to this and the required final project documentation resulted in the final balance of the ALFA grant not being transferred to the author's university until January 2004.

The ALFA-funded visits to the prospective partner Schools in the region were finally undertaken in July 1997. These semi-structured interviews covered the topics in a checklist of facts and issues relating to education for librarianship in a country, developed by the author for a number of studies undertaken during the 1980s whilst at CLW [78], and further developed for several projects assessing needs in Eastern Europe in the early 1990s [79, 80, 81, 82]. The interviews pointed to the following as key issues:

- Curriculum development
 - All the prospective partners were engaged in a continual process of curriculum development, as might be expected given the rapid changes in the discipline area.
- Research
 - All the prospective partners were engaged in the development of their research base.
- Staff Development
 - Because of the rapid changes in the discipline area, staff development was a critical issue. Opportunities for sharing experiences with professional colleagues were constrained in particular by their geographic isolation.
- Library and IT resources
 - Library resources in the partner institutions varied from reasonably good coverage of relevant journals to negligible and random provision. IT resources also varied, but there appeared to be common efforts to ensure that a minimum level of up-to-date equipment is made available.
- Linguistic competence of staff and students
 - All the prospective partner institutions had a number of staff who spoke fluent English, and many more who read it because it is the main language of communication in the discipline area. However, the ability of students to speak or read English varied from institution to institution. Spanish can be read and spoken by some of the staff and students in Brazil. [83]

As part of the UNESCO funded project, two surveys were undertaken in Latin America in 1997/98, with the assistance of partners in the region, to assess aspects of education and training by the SLIS, and the management and use of human resources in library and information work, as a preliminary to a joint IFLA/FID workshop in Valparaiso, Chile, originally intended to be held in October 1997. Because of the delay in completing the contractual agreement for the ALFA project, it was too late to complete the preparations for a major international meeting, and it was deferred until April 1998. Again, this delay in holding the workshop required UNESCO approval, as it fell outside the budget period. The grant from the UNESCO Participation Programme covered the costs of 15 participants from 10 other countries in the region, 4 resource persons from outside the region, and the meals and

refreshments for some 14 local participants, mainly those who had provided local organisational support. The author's participation in the workshop attracted further support from the British Council in the form of his airfare to Chile, and CONICYT supported the travel costs of one other resource person as well as local administrative costs. From the surveys and the subsequent focus groups at the workshop, it was possible to conclude that the libraries and information services in the region were confronted with a number of structural problems, including:

- ICT developments leading to changing demands for information services;
- many employees working at an operational level lacking ICT-related skills;
- shortage of potential recruits with appropriate skills;
- employees being confronted with a working situation in which they need to be trained and retrained constantly;
- limited opportunities for Continuing Professional Development;
- limited access to professional publications and learning materials, particularly those in indigenous languages [84, 85, 86].

Journal publishing in Latin America

As the problem began to become more defined, it became necessary to search the literature relating to the production of literature for the profession, and access to it. The scholarly peer-reviewed journal has developed into the standard means by which ideas and information are communicated within the academic community, providing an indexed archive of information [87, 88], and allowing for the development of quality control of research through the editorial peer-review system [89, 90]. The majority of researchers across all disciplines report that access to refereed journals, whether print or electronic, is essential to their work [91]. The journal remains a sound vehicle for the transmission of new knowledge, but in North America and Western Europe conventional print publishing is now recognised as inefficient because:

- the increase in the number of titles, and regular price increases, have not been matched by increases in library budgets (or by adequate compensation for declining currency exchange rates) and resulted in fewer purchasers for each title; and
- the contents of each journal consequently suffered limited and declining visibility amongst potential readers.

Superficially, the volume of professional journals in Portuguese and Spanish appears adequate to meet at least the minimum needs of the region. The significant collection held by the Centro Universitario de Investigaciones Bibliotecológicas at the Universidad Nacional Autónoma de México (UNAM-CUIB), and preliminary searches in various databases, have already indicated that over 170 LIS journals have been published in Latin America. However, Morales [92] has suggested that only about 60 of those might be 'current.' Many Latin American journals - in all disciplines - are sometimes referred to, somewhat cynically, as 'religious journals', because they are published 'when God wills', rather than with the regularity more familiar in Europe and North America.

It seems that a lack of resources or organisational capacity often prevents or seriously delays the publication and dissemination not only of these professional journals but also the proceedings of many relevant conference series that - because of the problems of journal publishing - form an important element in the corpus of professional literature in the region. They have also often been difficult to access because of their limited circulation outside national boundaries. A contributing factor to limited awareness of modern professional practices and curricula in Latin America has been the weak organisation of the book trade and bibliographic control in the majority of countries [93]. Postal services have also been more expensive and less reliable than in Europe and North America. Consequently, international trade in publications within the region and further afield has not been easy [94].

Most are subsidised by the governments through the National Science Councils or the Universities, and the editors and publishers have little financial incentive to raise standards, increase sales, or

improve distribution. The journals published in Spanish and Portuguese often duplicate coverage of subjects, or reprint papers from elsewhere, whilst possibly leaving significant gaps in the coverage of sub-disciplines [95]. Even within the same country, significant weaknesses in knowledge transfer have been revealed [96]. Recently, Urbizagástegui has examined what he defines as academic or near academic journals, i.e. those

“which include papers dealing with the direct confrontation of social reality at the national, regional or international levels or with reviews of literature, which is state-of-the-art in nature... that possess a fixed presentation, include articles and other materials on scientific and technical problems, and appear in an established regularity...” [97]

He has suggested that the number of these significant titles that are currently published in the region might be as low as 50.

To counter problems such as these, which affect all disciplines, the recommendations of a conference on ‘Scientific Journals in Latin America’, convened by the International Council of Scientific Unions in Guadalajara in 1997, inter alia, suggested:

“...the establishment of a Latin American scientific electronic periodicals collection.”

“...the identification and mapping of the publications produced in the region...”

“The mechanisms for the promotion and distribution of our scientific publications must be perfected.” [98]

Electronic publishing, whilst having high, fixed infrastructure costs has low, marginal distribution costs, reduces handling and storage costs for the purchasers, and its distribution and use is limited only by the availability of technology. Electronic journals were increasing in number and significance in all fields during the 1990s, and are now beginning to play an increasingly significant role in widening access to the information resources of the developing countries. The range of journals produced in developing countries that are available online has, however, increased principally as a result of a variety of regional initiatives by not-for-profit agencies and Non-Governmental Organisations. These have not only enabled economically disadvantaged countries to overcome underlying problems in the production, marketing and distribution of professional journals [99], but also enhanced international access to their research.

“The enormous potential for international cooperation in the exchange and utilisation of information that today’s technology offers, and tomorrow’s technology promises, presents a unique opportunity to library and information professionals. The growing demand for bibliographic exchange, multicultural internet resources, research unhampered by geographic or linguistic limitations, and cross-cultural networking, both in the sense of online technology and offline partnerships, is a challenge to libraries which should be welcomed and which must be addressed.” (IFLA statement on “Models of cooperation” [100])

Madkour [101] identified 3 fundamental obstacles impeding the transformation and modernisation of information services in developing countries: the volume of material being published; its limited geographic dissemination; and linguistic barriers. Whilst accepting that the language barrier remained a largely unsolved problem, he argued that the use of computers and the establishment of international information systems had alleviated the first 2 problems areas.

In Latin America, about 20 of the existing print-based journals in the field of LIS appear to have been already made available electronically in full text [102], and a smaller number of solely electronic journals have been initiated. There are also, however, papers about information management issues in other disciplines’ journals that are available electronically. The latter have mostly been made available through SciELO (Scientific Electronic Library Online, a project supported by FAPESP - Fundação de Amparo à Pesquisa do Estado de São Paulo in collaboration with BIREME - Centro Latino-Americano e do Caribe de Informação em Ciências da Saúde, and also supported by CNPq - Conselho Nacional de Desenvolvimento Científico e Tecnológico) [103], which was established in Brazil in 1997, with a rigorous non-technical infrastructure:

“The main aim of the SciELO project is the development of national scientific research... Policies, standards, guidelines, procedures and tools are provided in support of the publication of scientific journals on the internet... [I]n order to be included in the official SciELO sites, there must be compliance

with SciELO quality criteria, thus establishing challenges for the enhancement of the scientific output in the participating countries” [104]

The SciELO project, originally conceived to meet the need for quality health information in Brazil, envisages the development of a common methodology for the preparation, storage, open access dissemination, and evaluation of the entire region’s research literature in electronic format. The SciELO model [105] is now being adopted by other countries in Latin America. However, a collaborative approach provides a central archive of indexing data and a cross-site searching facility based in the original office maintained by FAPESP, the research support agency of the State of Sao Paulo. SciELO is now fully operational in Brazil, Chile, Cuba, and Spain, with pilot operations in Colombia, Costa Rica, Mexico, Peru, and Venezuela. Argentina, Bolivia, and Uruguay are in the preparatory stages. However, it remains the case that SciELO still makes only a small proportion of the totality of Hispano-Portuguese journals internationally available in full text, and its extension beyond its primary concern for health information remains a matter for determination in each country by the funding agency underwriting development. Recent discussions undertaken by the author at SciELO Headquarters suggest that FAPESP is now seeking additional financial support, and may implicitly be questioning whether it should be expected to support alone something that has a broad, international role. Only one journal in LIS has so far met the quality criteria for inclusion in SciELO (which prescribe arrangements for peer-reviewing, and regular publication), and the emergence of a new financial model may inhibit the willingness of other editors and publishers to consider submitting to this regime.

Indexing services in Latin America

Digitising journals would, alone, be of limited value, if it was not possible for a student or researcher to easily and quickly identify relevant content. However, the poor coverage of non-English language journals in the major indexing/abstracting services inhibits sharing information with and between the developing regions. It has been suggested that 70% of all the scientific journals published in Latin America are not included in any indexing service [106], while Rodriguez [107] has demonstrated how little of the Latin American literature in LIS is covered by the English language abstracting and indexing services. This remains the case 20 years later. For example, the Hispanic American Periodicals Index (HAPI) has been developed since the early 1970s by the Latin American Center of the University of California, Los Angeles, but only 6 of the 180 humanities and social sciences journals from Latin America that were indexed in 2003 were in the field of bibliography and information science [108]. The consequence is that papers in the field that are published in the region probably conform to the norm in being cited between 40% and 60% less than the world average for papers in the same field [109].

One of the most significant steps towards overcoming this problem was initiated by UNAM-CUIB. In the library services of developed countries, it has long been recognised that

“by uniting efforts and resources each library can obtain instruments and render services that would otherwise be impossible to offer.” [110]

In 1986, UNAM-CUIB established INFOBILA, a database of abstracts of Latin American publications in the field, based on formally agreed collaboration with a network of partners which at present covers 13 countries in addition to Mexico: Argentine, Brazil, Chile, Columbia, Costa Rica, Cuba, Dominican Republic, Ecuador, El Salvador, Panama, Peru, Uruguay and Venezuela [111].

Regrettably, INFOBILA possibly suffers the same fate as many similar

“... cooperative projects... [which] are completely unheard of in the countries in which [the indexed journals] originate.” [112]

Document delivery in Latin America

For initiatives such as INFOBILA to be truly successful, an effective document delivery service also needs to be developed. Traditionally, indexing and abstracting services have enabled users only to

identify articles or journals and required them to obtain copies of the full text via a separate document delivery service. Delivering library materials across international boundaries presents special challenges:

- time
- customs clearance
- security
- cost for the library sending by mail or for the student if receiving electronic text (that also requires printing)
- limitations on subject coverage in online full-text form
- quality of internet services in some countries [113]

The development of conventional document delivery services within Latin America has been limited, because, generally,

“Cooperation among Latin American countries... is somewhat limited, due largely to the difficult social and economic conditions existing in the majority of countries in the region.” [114]

For example, a study of selected special libraries in Latin America suggested that many as 86% would not permit international inter-library loan requests [115].

Delivery from more remote sources was also problematic. In 1986, it was taking on average 14 days, and in some cases up to 21 days, from the submission of the request for an inter-library loan requested from Britain to reach the individual who had requested it in Latin America [116]. Subsequently, the use of fax, e-mail, or Ariel software has potentially reduced this to less than 24 hours [117]. Immediate online access to full text is, however, now becoming a normal add-on for general indexing services, either by including the full text of a document, or by linking from the citation to a full-text electronic source.

“In today’s world, information has become globalized... In developed countries, ...barriers of time and distance have almost disappeared and user expectations have risen dramatically, and yet such advantages are not ubiquitous” [118]

Indeed, even if relevant Latin American publications can be identified, access to the full text still presents a challenge.

“Finding cost effective methods for providing international students with document delivery services... presents some thorny problems.” [119]

To overcome this problem, HAPI has been, in effect, out-sourcing its full-text provision since 2002 by providing links to journals digitised in full text by JSTOR (a collaborative venture by several Universities in the U.S.A.) [120] and by Ingenta (a commercial provider of web publishing services) [121]. Since 2003, HAPI has also been incorporating links to full-text versions of journals on independent publishers’ web sites. Full text access, however, depends in many cases on the user subscribing to the full-text service provider. Moreover, to date, none of the bibliographic or information science journals indexed by HAPI are available in full text through these links [122]. However, to support the development of UNAM’s new distance learning Masters degree in LIS (initially taught partly by staff travelling from Mexico City to deliver intensive classes in other cities), and its new Doctoral programme, UNAM-CUIB now seeks to play an even more important role in widening access to the professional information resources of the region. Accordingly, INFOBILA has been substantially rebuilt (on a Linux platform) over the past few months, to add new features including the capability to host and provide access to full-text e-publications, commencing with UNAM-CUIB’s own journal *Investigación Bibliotecológica: Archivonomía, bibliotecología e información*.

A starting point for the ALFA proposal was the recognition that communication problems resulting in a lack of awareness have been a major factor in hampering the spread of professional best practice within the region. If modern professional practices were to be implemented on a wide scale in Latin America, it would be important that both present and future generations have access to a wide range of published literature in their own language. This would support the development of students’

critical thinking skills, and enable them to demonstrate this not only through the research and analysis for their final thesis but also through their emergence as reflective practitioners. It would also be important that the best of the research undertaken by these students (and by their teachers and practitioners) should be widely published, to add to the body of professional knowledge in the region. Effective information dissemination would play a vital role in hastening the spread of modern professional practice, and would be the key to continuing self-development.

*A study of the feasibility of digitising all the Spanish and Portuguese journals in the field of LIS, particularly those published in Latin America, therefore seemed an appropriate way to underpin further developments. Following the practice of many European Commission funded projects that have acronyms that try to indicate something of the substance of the project, a Spanish name was chosen for the project, REVISTAS - **REd** **VI**rtual **S**obre **T**odas las **AM**érica**S**, which can be literally translated into English as 'JOURNALS - a virtual network across the Americas'.*

The future digitisation of the journals would do more than enable university teachers, their students, and working professionals to gain access to the region's professional information resources. It could encourage indigenous researchers to contribute to the region's journals. It could also make the research output of the region more readily available internationally, and would thus address what Packer, one of the founders of SciELO, has called a vicious circle:

"...scientists that publish in developing countries journals are penalized not only because of the lack of accessibility and visibility, but also because the impact their articles may have is, in most cases, completely ignored..." [123]

Thus, it should raise the status of professional education and research undertaken in the region, and foster more effective inter-regional and global cooperation and collaboration in teaching and research.

Developing an international partnership for the REVISTAS project

*In common with most of the research and development programmes that the European Commission sponsors, ALFA projects must be based on a multinational partnership. In the case of ALFA, the requirement is that there should be at least 3 Universities from Latin America and 3 from the member states of the European Union. Cooperation assumes an agreement between individuals or organizations to work together for common purposes, and a willingness to share resources or adopt a coordinating mechanism for their activities. To take the REVISTAS proposal forward, it would be necessary to bring together a consortium whose common purposes would include sharing of expertise to resolve issues or problems
sharing materials or services
sharing risks in developing and testing new services [124].*

However, the partnership formed for the earlier RELACION project could not be sustained during the preparation of a new proposal. Communications with Cuba proved impossible, for linguistic or technical reasons. Staff in one of the European partner institutions were preoccupied with major professional development demands arising from their national government's approach to implementing the consequences of the Bologna agreements on a common European framework for Higher Education. There was thus no residual basis for continuing the work that had been completed in 1997/98. The challenge was to find appropriate new partners in Latin America, and continental Europe.

Fortunately, the author was invited to speak at a conference in 2000, organised by the Brazilian partner in the RELACION project, and there met representatives of one of that institution's other European partners, Universidad Carlos III. That University was developing its distance learning activities, and was interested in developing an ALFA project proposal to examine the feasibility of an international distance-learning programme in LIS for Latin America. It was recognised that the Robert Gordon had complementary expertise in distance learning, and that any distance learning

programme would be enhanced by improved access to professional journals in Portuguese and Spanish. It was agreed to collaborate on two joint proposals, provided that further partners could be engaged.

Staff at Universidad Carlos III were familiar with one of the Argentine participants in the 1998 workshop in Chile. He was interested in developing an ALFA project proposal to develop aspects of management education, and was persuaded to join the team. The first of the proposals that was submitted to ALFA following this meeting was for project DILEMA - DIstance LEarning on Information and Knowledge MAnagement, led by Universidad Carlos III, which was intended to investigate the viability of a virtual distance learning Masters Degree programme. The DILEMA proposal was submitted to ALFA in October 2001, but was not approved by the European Commission when decisions were announced in August 2002, perhaps because the Commission's assessors were aware of the renewed efforts within the region to establish distance education programmes in LIS.

Discussions between the author and the Argentine colleague had continued fitfully by e-mail since the workshop in Valparaiso. In November 2001 the Argentine colleague encouraged the organisers of the Feria del Libro in Guadalajara, Mexico to issue an invitation to the author to participate in workshops there, which provided an opportunity for further face-to-face discussions. The REVISTAS proposal went some way towards meeting his aspirations, and he agreed to secure his university's approval to participate in that bid.

It had been anticipated that the REVISTAS project would face a similar challenge to that encountered in planning for the extension of the LAPTOC database (Latin American Periodicals Tables of Contents), which provides access to the contents of more than 800 Latin American journals in the humanities and social sciences [125], where

"The main challenge was to find a research library whose active periodical subscriptions represented their particular region as opposed to imprints limited to the national level..." [126]

However, the existence of INFOBILA and UNAM-CUIB's substantial collection of original materials offered a potentially significant contribution towards solving that problem. The meeting in Guadalajara also proved to be a crucial opportunity to renew face-to-face contact with the Director of UNAM-CUIB who, in an earlier capacity, had taken part in the workshop in Chile in 1998. The Director of UNAM-CUIB had a direct interest in expanding the range of material available online, and was easily persuaded to join the partnership. This proved to be fortuitous, as it transpired when the consent forms were being gathered in that the principal in the Peruvian partner in RELACION had left to study in another country, limiting that small School's capacity to participate in international collaborative activities. The Peruvian University was committed to the DILEMA proposal, on which a decision was still awaited, and the University authorities decided that they could not take the risk of being committed if both projects were successful. Without UNAM-CUIB's inclusion, another partner would have had to be sought. The final project partnership comprised:

- *The Robert Gordon University (RGU), Aberdeen, Scotland (Contractor and Coordinator)*
- *Universidad Nacional del Sur, Bahía Blanca, Argentina*
- *Universidad Federal do Parana, Curitiba, Brazil*
- *Universidad Nacional Autónoma de México, México City, México*
- *Queen Margaret University College, Edinburgh, Scotland*
- *Universidad Carlos III, Madrid, Spain*
- *Hogskolan i Boras, Boras, Sweden*

The proposal for the REVISTAS project was initially intended to particularly complement and support DILEMA, but was finally presented as intended to support all the other education programmes in the region. In this proposal, the Robert Gordon University (RGU) and its partners all brought certain interests and expertise to the project. RGU is committed to expanding its research and international activities - in common with many of the institutions designated as universities by the British government in the early 1990s - and the author has a longstanding commitment to international library development. The Latin American partners generally bring to the project a geographic and

linguistic diversity, teachers, researchers and practitioners, and access to relevant bibliographic resources. Staff at Universidad Nacional del Sur are involved in preparing one of the University's journals for inclusion in SciELO. Universidad Federal do Parana was a partner in the previous project, because of its commitment to innovative curricular developments, and the staff concerned are teaching digital librarianship. The UNAM-CUIB hosts the INFOBILA database and is adding full text material to it. The European partners contribute a wide base of experience in Latin America, and an understanding of most of the issues concerned with scholarly communication, journal publication and use. The active participant at Hogskolan i Boras is active in assessing bibliographic services and their use, is regularly active in Latin America, and was a resource person in the 1998 workshop in Chile. Universidad Carlos III draws a large number of its postgraduate students from Latin America, and thus has a further interest both in raising its visibility in the region and in the provision of relevant learning resources. The participant from Queen Margaret University College is Mexican by birth, has worked for an international serials vendor, and continues to be involved in the development of libraries and publishing in Latin America.

The REVISTAS team aim to identify the journals in the field of LIS published in the principal languages of the region, and identify the patterns of publication and use of these journals. To permit digitisation of past, current and future issues of these journals, they will seek agreement from the journal publishers, and review mechanisms for developing a cooperative electronic library of full-text journals and for ensuring that future issues of all these journals are indexed and abstracted in an online database. The team also aim to develop an on-line inventory of training resources in Portuguese, Spanish and English to support future digitisation projects, and to try to identify a potential source of funds for the eventual digitisation of the journals they locate. The work of gathering data will be shared amongst the partners, and the project would thus be more egalitarian in nature than many previous engagements between foreign and regional SLIS. Moreover, the underlying concept is that the project is no more than a step towards providing the resources to underpin curricular development and research that could then be undertaken by the SLIS in the region.

The partnership required for a new proposal was in place, but two further problems were encountered. The first was, almost inevitably, financial. The budget available for ALFA projects is limited, and is further constrained by ALFA guidelines, restricting the project's potential. These guidelines also specify the proportion of expenditure that may fall into certain categories, and require that a contribution must be made by the participating universities. The cost of employing the personnel engaged on the project may not be counted as the universities' contribution, other than in the form of the small fixed percentage of the total costs that is allowable for project administration. In large projects a real cash contribution would be necessary to balance the books in a credible manner, but in small projects, such as RELACION and REVISTAS, the requirement for contributions in kind could be covered by notional other costs. In RELACION, for example, the contributions in kind were presented mainly as the notional costs of copying documentation for the project. For REVISTAS, the notional amount of copying required to cover the participants' contribution would not be credible, and the notional cost of providing an e-mail discussion group on RGU's Virtual Campus also had to be included. Recognising that the non-ALFA funding available to the partner institutions was limited, and that the ALFA per diem allowances for participating in meetings were not subject to detailed accounting of actual expenditure, the budget included provision for per diem allowances for local participants, with the expectation that these funds would be sufficient to cover local costs in organising and hosting meetings, etc.

The second was technical. ALFA requires the submission, by a fixed deadline, of an application form accompanied by the original copies of forms of consent signed by an authorised senior official from each of the participating institutions. Because of delays in the mail, one partner's consent form arrived after the April deadline, and consideration of the application was delayed until the next round in October 2002. (Subsequent experience in another proposal with which the author is associated indicated that the ALFA Programme Office would have accepted the inclusion of a faxed copy of a

consent form with the proposal which was submitted by the Columbus Group³, provided that they were advised that the original was in the mail and would be received in the near future.) In August 2003, when the results of that round were announced, the successful applications included a grant of up to €79,140 for REVISTAS, and the contract was finally signed at the end of November that year.

Critical Success Factors for initiating international cooperation: an initial list

Whilst this is only a single case study, it has suggested Critical Success Factors that have not previously been identified through objective investigation. To be useful to those considering starting other projects, the CSFs that appear to have contributed to the success of the proposal for REVISTAS have been generalised and set within Rockart's key performance areas [127]. Analysis of the background to the proposal indicates that the following factors were evident:

- **Industry**
 - a thoroughly researched understanding of the professional context, underpinned by evidence of relevant developments;
- **Competitive strategy and industry position**
 - the increasingly important and evident role of libraries and information services in facilitating access to networked information resources;
- **Environmental factors**
 - a funding agency established to operate in the specific geographic and occupational areas, and with potentially relevant priorities;
 - a high level professional network from which political support for the proposal could be enlisted;
- **Temporal factors**
 - the expansion of access to the World Wide Web in the region;
 - the expansion of the European Union's international development programmes;
 - a regional political environment supportive of the development of the 'Information Society';
 - a supportive lead institution, able to release staff time and to provide additional financial support when needed, and supportive partner institutions;
 - the ability to accommodate the required funding within the agency's guidelines;
- **Managerial position**
 - an individual required to undertake research, and thus able to shoulder the additional task of developing the proposal and leading the activity;
 - an individual with a well developed network of potential collaborators with interests and expertise relevant to the proposed activity;
 - a group of individual's whose professional and institutional interests related to the project goals, albeit differing in detail.

The author had been able to bring to bear, personally or indirectly, an awareness of funding agencies, their remits, and their methods, and a network of influential supporters. The case study demonstrates how the proposal identified the political, professional and technical circumstances with the interests of a potential funding agency. The proposal, and this case study, also showed the funding agency how the underpinning theory was built. The evidence of need was demonstrated not only from the literature, but also by assembling current expert opinion from interviews and focus groups, and by pointing to developments that were already taking place in the region. However, it also emphasised the lessons from experience elsewhere that:

“networking in the academic field is a complex issue: it involves a great potential for inspiration and synergy, but also the need for courage, patience, openness, and respect for the ‘different’.” [128]

Finding sufficient willing participants with appropriate expertise proved an unexpected challenge, as it had not been anticipated that some the RELACION partners would be unable to continue their

³ The Columbus Group, based in UNESCO Headquarters, coordinates joint activities by the Unión de Universidades de América Latina, and the European Universities' Association. Further information is available at URL - <http://www.columbus-web.com/index.html> [Accessed 7 August 2004]

involvement, or that telecommunications with Cuba would fail. However, with some difficulty, over a period of time it proved possible to assemble a new team, for each of whom participating in the project offered outcomes that go some way towards satisfying personal or institutional goals. The funding is adequate for a limited set of goals, but nonetheless had to be carefully contrived to respect the ALFA guidelines.

There are potential weaknesses in the analysis presented in this paper. Further case studies are required to facilitate a broader, qualitative investigation to test the generalisability of the Critical Success Factors emerging from this study. More certainty about how to initiate a successful proposal could be expected if others were willing and able to contribute similar openly self-critical statements for analysis. This would also eradicate any concerns that bias may have crept into this study as a result of being based largely on the author's perceptions, a problem that is recognised as an inherent risk in any 'participant-observer' study. Even more understanding would be derived if the authors of any future studies were able to gain access to the evaluators of proposals. Again, this is an implicit problem in 'participant-observer' studies [129]. The other recognised weakness in the study is one that derives from the problem the study addressed. Identifying and accessing relevant literature was far from easy, and omissions from the literature identified may have concealed some insights from the author, as might his less than perfect knowledge of the languages concerned. However, the input from partners and participants in interviews and focus groups should have offset these deficiencies to a large extent.

The successful implementation of international projects – successful in operational terms and in terms of delivering sustainable outcomes – represents further areas that need to be investigated. Undertaking the REVISTAS project still presents some not insignificant challenges, and may offer the opportunity for such an initial analysis using a similar methodology. There may also be other methodologies that could be applied to analysing the various aspects of cooperation and collaboration, and the methodologies used for examining similar activities in other fields need to be evaluated.

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