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REPORT OF INFORMATION / RESEARCH DEVELOPMENTS

Prepared for the UIA Executive Council, May 1995

Contents

I. Current publication production

II. New developments

A. Restructuring the Yearbook

B. French-language "Yearbook"

C. Compact disk (CD-ROM)

D. Internet (World Wide Web) publication

E. Guide series

F. International Association Statutes

G. Bibliographical publication

H. Statistical development

III. Publishing and marketing

IV. In-house computer system

V. Strategic issues (*see 1992 Assembly report*)

VI. Research-related issues

Annex 1 Yearbook statistics (international organizations by type)

Annex 2 Encyclopedia statistics

Annex 3 International organization action strategies

Annex 4a Annuaire français sur CD-ROM et Internet

Annex 4b Annuaire français sur CD-ROM et Internet (Conception révisée)

Annex 5 UIA Options for CD-ROM Internet (electronic publishing)

Annex 6 Electronic publishing (extracts from technical press)

Annex 7 Checklist of recent papers / Participation in meetings

I. CURRENT PUBLICATION PRODUCTION

A. Yearbook of International Organizations

Work on the 32nd edition of this series has followed the regular pattern. At the time of writing (April 26th), editing of Volume 1 has been completed. See **Annex 1** for statistics.

As indicated in previous reports, it continues to be necessary to exclude more categories of entry (and/or paragraphs from entries). The response of the publisher, discussed in previous years, is that "overflow" of any kind will have to be carried in future in the CD-ROM currently in preparation (see below).

Work on Volumes 2 and 3 is on schedule for completion in May and June. Mailings for the 33rd edition are already commencing.

B. Encyclopedia of World Problems and Human Potential

Work on the 4th edition of this 3-volume publication commenced at the beginning of 1993. The first two volumes were successfully completed in April 1994. See **Annex 2** for statistics.

Work on the third volume, agreed in March 1994, has continued since June 1994 and is scheduled for completion in June 1995. It covers "Actions - Strategies - Solutions" employed or envisaged by international organizations and constituencies. At present the database covers some 18,000 "strategies", although only 4,000 have any descriptive text. As with the other volumes, much effort is being devoted to relationships between strategies, and in this case also to the "problems" in Volume 1 and to the organizations in the Yearbook. The publication is expected to be some 750 pages. See **Annex 3** for a general description.

The project is designed to build on existing advantages:

- work done on strategies for the 1986 edition of the Encyclopedia
- information in UIA files, or available, on strategy material from international organizations
- skills developed by the editor of the world problems section of the Encyclopedia

Consideration is being given to the transfer of world problems information in Volume 3 of the Yearbook to Volume 3 of the Encyclopedia in order to create more space in the former product and to increase the marketability of the latter.

C. Who's Who in International Organizations

SAUR remains very interested in this series. Work started from mid-April 1994 on a 2nd edition of this publication. This is scheduled for completion in June 1995.

The UIA was fortunate to come to an agreement with a former member of the UIA editorial staff familiar with the UIA style and computer software. Editing has been largely done at her home as the first UIA experiment in a mode of work much discussed as the future of many forms of work.

D. International Congress Calendar

This is the subject of a separate report.

E. Transnational Associations

This is the subject of a separate report.

II. NEW DEVELOPMENTS

A. Restructuring the Yearbook

At this point, no further restructuring of the Yearbook is planned until the impact of the CD-ROM initiative is clear.

B. French-language "Yearbook"

The last French edition was produced in 1980 with the aid of the French Government. Discussions on the possibility of a CD-ROM based French version of the Yearbook, initiated by the French Government in 1991, have continued through to the present. Contacts have been developed with other possible partners, notably the ACCT, the Communauté française de Belgique and the Délégation de Québec.

At the time of writing, an amount of 320,000 FF has been transferred to UIA by the French Government. This represents approximately one third of the estimated amount required for the task -- if the translation is to be complete in every detail. The global budget is approximately 1 million FF. The problem is therefore what to do if the remaining two thirds cannot be obtained from some other source.

As noted above, the possibility of using machine-assisted translation has been explored (two systems have been tested) in order to reduce translation costs and to increase the speed at which the translation can be done so as to respect any CD-ROM deadlines for the English version. It is however expected that a more conventional approach will be taken.

It is appropriate to note that the problems for any subsequent edition of the French version are themselves complex:

(a) It is improbable that equivalent sums of money will be made available by the French Government for a second edition.

(b) There are major technical problems in identifying which updates to any English edition need to be translated as modifications to the French edition in order to respect the parallelism between the two language versions.

The UIA was requested to make a further presentation on the project to the *Comité pour le Français dans les Organisations Internationales* in Paris in February 1995. The "background document", reflecting the situation on that occasion is included here as **Annex 4a**.

The most sensitive issue was the manner in which the French information would be handled in relation to the English information on the CD-ROM, especially with the likelihood that the English information would be more frequently updated than the French.

A representative of the ACCT proposed in March 1995 that, in the absence of the funding required, the focus be placed on including French language texts prepared by French-speaking organizations, rather than attempting the costly "translation" of the work as a whole. This possibility is being referred to higher authority, with an intermediate meeting on 4th May 1995, to which a revised proposal was submitted at the request of the French (see **Annex 4b**) in anticipation of a proactive response. The possibility of Canadian (or Quebec) intervention (assisted by Christian de Laet) remains an active possibility.

But on the basis of this suggestion, the UIA is requesting French language texts from French-speaking organizations. This information will be included in the CD-ROM currently in preparation, together with partially revised information from the 1980 version. The approach will be experimental (including use of a scanner), as a means of attracting further funding, notably on the occasion of the Cotonou Summit at the end of 1995.

C. Compact disk (CD-ROM)

This matter has been the subject of long and complex negotiations with SAUR for several years. These have been reported to the General Assembly on previous occasions. The current situation is as follows.

Following the unsatisfactory delays in negotiating with SAUR's partners in the USA in 1993, it was decided that the UIA would itself experiment with producing a test CD-ROM using its own software. A test disk was successfully produced in October 1993 and shown to SAUR. A subsequent demonstration was made in Munich at SAUR's HQ. Seemingly this was important to the internal politics of the SAUR group -- a client producing a CD-ROM.

It was then agreed that UIA would go ahead and improve the quality of the test version for general marketing. Specific issues were:

- standardizing the functions
- resemblance to other SAUR products
- production techniques
- software required
- security
- adaptation to Windows

It was tentatively agreed that this work would be done in the first months of 1994. To do this two attempts were made to sub-contract portions of the work. These were not satisfactory. It was then decided that the UIA would undertake the necessary adaptation using in-house resources as much as possible.

Work on the CD-ROM and associated software upgrades was started in mid-1994. Hardware upgrades associated with this process were undertaken in April 1994. A distribution licence was negotiated with Revelation in January 1995 for a CD-ROM version.

Although considerable advances were made in producing a software interface to take advantage of the UIA investment in Advanced Revelation software over the years, the following factors have hindered further development:

- significant "bugs" were reported in the available release of the software from Advanced Revelation. The upgrade to repair them was delayed and was only formally made available to the UIA on 23rd April 1995 (although a version has been obtained over by e-mail in April 1994).
- the absence of bug-free software has prevented completion of the user interface and leaves unsolved questions about security and other features which users increasingly request.
- in February 1995 reports on electronic publishing software strongly recommended the Folio Infobase software as a "robust" solution to many of the problems which it may prove difficult to integrate into the Revelation version, notably the security features.

Investigation of the Folio software resulted in the conclusion of a contract in March 1995 with a Quebec-based company (introduced by Christian de Laet) to convert UIA data into the Folio format. Work commenced 18th April on a schedule which should produce a CD-ROM by June-July. This software will also permit:

- inclusion of images such as photographs (relating to the Who's Who database), logos, or organization charts
- operation in a Windows environment (increasingly the standard platform) for CD-ROM operation

Two copies of Folio production software were purchased (with the assistance of Christian de Laet) to enable work to be done both in Montreal and Brussels. For marketing reasons, in addition to the Windows version, it will be necessary to purchase DOS (and possibly Mac) versions, according to

Saur. The French initiative will also require a French interface.

The UIA has purchased a machine to record CD-ROMs, which can be used to test and produce master copies for reproduction elsewhere. It is intended to produce several different CD-ROMs, with more or less of the UIA information. Exactly what is produced will be determined in consultation with SAUR, although the UIA may produce versions for independent distribution (not through SAUR). Possibilities include CD-ROMs with:

- Yearbook database only (with French versions?)
- Yearbook plus Calendar database
- Encyclopedia only
- "all" databases
- subsets by subject or geographical region

Note that using a scanner also implies the possibility of placing texts from back copies of Transnational Associations and other reports onto CD-ROM.

Preliminary demonstrations of the use of the Folio software with Yearbook entries can be made during the meeting.

D. Internet (World Wide Web) publication

Since late in 1993, electronic publishing has been confronted by a new phenomenon as a result of work done at CERN on hypertext linked documents. This has resulted in the emergence of what is known as the World Wide Web, accessible on all computers by modem from around the world. Throughout 1994 the technical and popular press has covered the major implications of this phenomenon (see **Annex 5, Annex 6**).

Such is the simplicity and elegance of the concept, that it constitutes an immediate challenge to any existing publisher, but especially to any organizations (or individuals) with publishing ambitions or information to disseminate -- notably of the kind produced by the UIA.

In October 1994 the UIA subscribed on an experimental basis to a service providing access to Internet and the Web. The purpose was to test and offer e-mail access to the UIA, notably for organizations wishing to reply in this mode.

It quickly became evident that:

- the Web offered a unique place for organizations of every size and activity to display their wares. Many international organizations are now setting up "home pages" on the Web for this purpose.
- much software was available on a non-commercial basis to permit further experimentation by the UIA on a range of possibilities:
 - placing UIA data on Internet in some form (notably on the Web), through a third party. Preliminary discussions have been held regarding this possibility.
 - preparing the data to be placed on Internet for Web access (bypassing any need to invest in development of any software)
- operating a UIA Web Server (see **Annex 6**)
- the UIA can simulate access to its own data in hypertext Web mode on the UIA computer system. This has been successfully done. The results can also be made available on CD-ROM -- but without any security constraints. A preliminary demonstration using much UIA data can be made during the meeting with access via a standard "web browser" (Netscape). The data will be held on CD-ROM

demonstrating further possibilities.

Placing data onto Internet adds to the existing challenge for the UIA and SAUR of the balance to be found between book (Yearbook, Encyclopedia) and CD-ROM. A balance must be found between all three for marketing purposes and in the relationship with SAUR. Some of these points are discussed in more detail in **Annex 5**

E. "Guide series"

Publications last appeared in this series in 1985. It was discontinued because of marketing problems.

SAUR has proposed the publication of a World Guide to Religious Organizations. This would be partly designed to make use of material collected for what was originally intended as the Who's Who in Religion. If final agreement is reached, work would start from June 1995, with a view to extracting information from the Yearbook to be partially updated for publication at the beginning of 1996.

The work will be done by the member of staff responsible for the Whos Who in International Organizations to be completed in June 1995.

F. International Association Statutes

This publication was last produced in 1988 and SAUR has no desire to produce another paper version. It remains an interesting product to include on any CD-ROM to enhance the UIA description of international organizations. Politically it is also important in relation to the possible initiatives to "register" international organizations within Europe. Technically the problem is one of finding a minimal cost procedure to get the text onto computer -- scanning being the logical approach. Final details of the CD-ROM contract will determine the extra cost of placing such information onto the CD-ROM.

G. Bibliographical publication

SAUR has expressed interest in the production of a Directory of Publications of International Organizations. This could include the following components:

- (a) Publications identified in organization descriptions in the Yearbook and currently presented in the Publications Index (in Volume 1).
- (b) Publications in the various bibliographies of the Encyclopedia, notably that on problems with which international organizations are concerned.
- (c) Publications on international organizations. This relates to the planned UIA project to update its bibliographies of studies of international organizations.

H. Statistical development

This initiative is described in connection with the report on the International Congress Calendar.

III. PUBLISHING AND MARKETING

A. Contractual relationships with SAUR

Work continues under long-standing contracts. Both parties continue to express satisfaction with the arrangements, despite the many threats to the publishing industry and booksales in a time of recession and general uncertainty.

New contracts currently under discussion are:

- for the World Guide to Religious Organizations
- for the future CD-ROM publication

B. Sales and marketing

Sales continue at a satisfactory level despite the general recession. SAUR remains very satisfied with UIA products.

Receipts under SAUR contracts increased by 5 percent in 1993 as a result of the adjustment of the contract as previously reported to the General Assembly. These receipts from SAUR are in general higher (13.8 million BF) compared to those from sales through UIA itself (7.6 million BF), although this last figure is more than twice the 1993 result.

Receipts from sale of publications by UIA itself (through Brussels) remain satisfactory. Results for all publications gave more than 2.1 million FB more than in 1993.

The issue of UIA marketing from Brussels remains unresolved (if it is a real issue). It continues at a very modest level.

A regrettable issue raised each year by SAUR is the lack of appropriate financial arrangements through which to dispose of unsold copies of UIA publications. The problem is that the cost of shipping them from Germany is quite significant and the lack of guarantee that they can be sold at any price makes it awkward for the UIA to take any position on the matter. Such publications are therefore regularly pulped. Occasionally arrangements have been made with UNESCO, the difficulty being that such arrangements are easily abused resulting in loss of income. A more creative approach to this may result from the contacts with the head of UNESCO's General Programme of Information and the ACCT.

As noted above, the marketing challenge has been considerably modified by Internet access. This calls for a careful balancing act, in consultation with SAUR, concerning:

- simple use of a "home-page" explaining UIA (and its publications) on Internet
- addition of a more or less extensive sample of data on Internet
- placing a complete functional database on Internet, excluding text or other significant portions, at no charge to users. This might be successfully done for Encyclopedia information (eg relationships only)
- providing some information free and charging for access to other information

It is important to recognize that much information on organizations and meetings is already available on Internet free of charge. Increasing amounts will be made available in this way, notably by the United Nations. The UIA may be forced to recognize that its main asset lies not in the information itself but in the capacity to manage and update it.

IV. IN-HOUSE COMPUTER SYSTEM

A. Hardware

Investments in hardware have taken the following form:

- completion of the upgrade of editorial and other workstations from 286 to 386 (or 486) to permit the software upgrade associated with the new release of Revelation and CD-ROM development. Furthermore 286 machines can no longer be adequately maintained and with the emergence of 486 machines as standard, the price of upgrading machines to 386 has been very reasonable at this time.
- extra colour monitors to facilitate certain forms of wordprocessing
- a CD-ROM recording machine
- a scanner in anticipation of introducing new kinds of information onto the CD-ROM
- a computer with a gigabyte drive to test CD-ROM production.
- a new laser printer to replace a printer that can no longer be maintained
- three modems to test access to Internet and access from distant locations to the UIA

B. Software

A shift to DOS 6.20 has been implemented as a way of solving memory problems for certain editing procedures on 386 machines.

The upgrade of the core Revelation software to version 3.11 was acquired and has been implemented.

A Windows-based version of Revelation (Open Insight) has been purchased to permit testing creation of a Windows-based version of the CD-ROM.

Software to analyze networks of relationships has been donated by the Inter-University Project Group of the University of Amsterdam/Groningen/Nijmegen/Twente. It may prove useful in relation to both inter-organization and inter-problem networks.

Software has been acquired to test low-cost access to the UIA network from a distance -- with the prospect of two editors working from home. A first round of tests has been successfully carried out.

New kinds of work are increasingly being done in a Windows environment, notably in relation to Internet access. For example, various software packages are being used to explore electronic communications, whether e-mail, Web browsing or other types of access.

V. STRATEGIC ISSUES

The long-term strategic issues were discussed on the occasion of the 1992 General Assembly (in Annex 5).

VI. RESEARCH-RELATED ISSUES

Research-related issues are also developed in other reports. A report on the special study of consultative status relationships with the United Nations will also be made separately.

A checklist of papers is presented in **Annex 7**.

In addition to papers prepared in response to particular occasions and conferences, research-related work is also done in connection with the Encyclopedia. Where possible adaptations of research papers have been used in explanatory sections of the Encyclopedia.

Current research themes include:

A. Transformative conferencing

Opportunities to develop innovative approaches to conferencing continue to be explored. A group partially funded by the UIA played a significant role in the coordination of the "open forum" session at the 13th Congress of the World Futures Studies Federation (Finland, August 1993) and of the facilitation of the Parliament of the World's Religions (Chicago, September 1993) in the light of the Alma Ata event.

The UIA was able to encourage the use of innovative processes at a recent conference of the UNESCO Division of Philosophy (Paris, March 1995). These used both the messaging and visual minuting techniques sponsored by the UIA.

B. New approaches to organization and policy-making

This theme, notably in relation to the current debate on world governance, remains a continuing concern currently reflected in papers on metaphor and in the contents of the new edition of the Encyclopedia. UIA contribution to this debate was acknowledged in the recent report of the Commission on Global Governance.

C. Metaphors and catalytic imagery

As indicated by the checklist of publications, this theme continues to be developed in response to various opportunities, (notably in French versions). A paper on metaphor and the language of futures was specially commissioned.

D. Interdisciplinarity

The UIA continues to participate in conferences on this theme. An abridged version of a paper to the earlier event (Paris, 1991) appeared in a book in French in 1994. The UIA was represented on the international organizing committee of the first World Congress on Transdisciplinarity (Lisbon, 1994), in relation to which several UIA papers were presented or prepared.

The UIA was invited to present the keynote address at the Conference on the Organization of Environmental Information (Bratislava, 1994). This follows up much earlier work on this topic, notably coordinated through the UN Library in Geneva.

E. Mapping and visualization

This issue remains a continuing concern. It appears that it will be relatively easy (in terms of cost) to include organization charts and any other network maps on the planned CD-ROM.

UIA data was fed into a highly sophisticated network mapping software package during a special one day demonstration in the UK. The resulting maps have been used as end papers in the forthcoming editions of the Yearbook and the Encyclopedia in agreement with SAUR. The package is very suggestive of the future development of interaction with UIA data. It was suggested that a demonstration version of the package should be incorporated into the planned CD-ROM.

F. Values

Much work has been done on values for the new edition of the Encyclopedia, notably by providing a unique pattern of links from values to world problems and to human development.

On the initiative of Professor Tibaldi, a book was prepared in Italian (*Valori Humani*, 1994) which carried some aspects of this work.

G. Consultancy

Under a consultancy contract with UNESCO in 1994/5, the UIA acted as "chief evaluator" for an exploration of UNESCO's relations with NGOs receiving subventions, with a view to providing guidance for new policies. A report resulted from this process.

At the suggestion of Frits Hondius the UIA was invited by the Council of Europe to participate in a seminar in Moscow in December 1994 on the civil society, notably with respect to the future of democracy in Russia.

H. Proposal for a "Scientific Committee"

On the occasion of the visit of the representative of the ACCT, Suzanne Richer, regarding the French Yearbook, she raised the issue of whether the UIA had a scientific committee, notably with respect to coverage of the Yearbook. It was pointed out to her that the UIA was obliged to follow empirically the manifestations of international organizations in all their forms, under the logistic and other constraints of obtaining adequate information from them. Efforts to "normalize" this process in the light of any particular scientific guidelines, notably with regard to terms used in organization titles, would be perceived as unrealistic and counter-productive.

H. Statistics on meetings and organizations

This issue remains a continuing concern, especially in relation to the commitment to Associate Members.

I. Invitations/Attendance at meetings

This forms the subject of a separate note (see **Annex 7**)

PROJET

ORGANISATIONS INTERNATIONALES SUR CD-ROM et/ou INTERNET

"ANNUAIRE FRANCAIS"

1. Le rôle de "l'Annuaire des Organisations Internationales"

Le premier *Annuaire de la Vie Internationale* a paru en 1905. A partir de 1908 l'ouvrage a été édité par l'UAI exclusivement en langue française. Avec sa reprise en 1949, l'*Annuaire des Organisations Internationales* paraissait alternativement en français et en anglais jusqu'en 1961. Par la suite deux éditions ont paru en langue française en 1974 et 1981. L'Annuaire a fait l'objet d'une Résolution de l'ECOSOC en 1950 (334 B (XI)). Actuellement l'Annuaire répertorie 38.000 organisations et organismes internationaux, sans but lucratif, de type **gouvernemental** et **nongouvernemental** implantés dans tous les pays du monde. Depuis 1983 il paraît annuellement en trois volumes de 2.000 pages chacun. Les descriptions sont en langue anglaise, mais des explications, des titres d'organisations, et des clefs d'accès sont développées en français.

Différents signes d'intérêt pour une nouvelle édition en langue française se sont manifestés au cours des dix dernières années, mais la difficulté vient surtout, en dépit des progrès informatiques, de l'actuelle non-rentabilité d'un Annuaire français sur papier.

2. Une occasion de profiter de l'opération CD-ROM

Dès 1990, l'UAI s'est rendu compte des contraintes de la version anglaise sur papier de son Annuaire qui ne permettaient plus la publication intégrale des informations disponibles. La grande capacité d'absorption des informations offerte par le CD-ROM suggérait la possibilité:

- d'y introduire une version de l'Annuaire, élargie par rapport à celle qui continue à être éditée sur papier
- d'y inclure d'autres publications de l'UAI dont le contenu était directement lié à l'usage de l'Annuaire (notamment le calendrier des réunions futures);
- d'améliorer l'utilisation via d'autres clefs linguistiques, notamment le français;
- d'ajouter des outils d'accès, profitant des avantages CD-ROM par rapport au livre.

Les notices descriptives des organisations internationales en langue anglaise vont être transférées sur disque compact CD-ROM dans le courant de 1995, probablement avec d'autres informations complémentaires de l'UAI (calendrier des congrès internationaux futurs, descriptions des problèmes mondiaux, statuts des organisations internationales). Il y a plusieurs moyens d'adjoindre les informations en version française et de créer ainsi un outil d'information pour des utilisateurs francophones là où un volume sur papier devient de moins en moins rentable.

3. Avantages du CD-ROM

Un seul disque CD-ROM peut facilement contenir l'ensemble des ouvrages de référence de l'UAI, soit jusqu'à 600 millions de caractères. A noter que l'Annuaire en langue anglaise ne comporte à lui seul que 60 millions de caractères actuellement. Mais l'avantage principal réside dans une facilité d'accès pour l'utilisateur, sans comparaison avec celle du livre, notamment dans l'extension de la gamme des index et des clefs linguistiques. L'UAI envisage d'y mettre certaines de ses bases de données:

- la version anglaise actuelle de l'Annuaire
- la version française de l'Annuaire réactualisée
- les "problèmes mondiaux" de l'Encyclopedia
- les concepts du "développement humain" de l'Encyclopedia
- les stratégies de l'Encyclopedia
- les réunions du Calendrier International des Congrès
- les notices biographiques de son Who's Who

4. Le défi de l'Internet

Depuis le commencement des négociations sur la possibilité d'un Annuaire sur CD-ROM, la technologie des communications internationales a beaucoup évolué avec l'arrivée de l'Internet -- "le réseau des réseaux". Il s'agit du système d'interconnexions sur le plan mondial de milliers d'ordinateurs, petits et grands, à partir des réseaux de communication entre universités et centres de documentation. Depuis 1993, on cite **une augmentation du nombre d'utilisateurs de 25% par an jusqu'à 35 millions**. Il y a actuellement une véritable explosion d'intérêt, même dans les institutions internationales, pour ce nouveau moyen de dissémination d'informations de toutes sortes. Même le particulier doté d'un équipement très simple accède à des richesses de connaissances situées dans n'importe quel pays. Comme dans d'autres cas, le déséquilibre linguistique en faveur de l'anglais (80% de communications) a provoqué des cris d'alarme.

Afin de bien se positionner par rapport à d'autres fournisseurs d'information, l'UAI s'y est abonné depuis octobre 1994 à titre expérimental. En décembre, des négociations techniques ont débuté pour déterminer l'investissement requis pour que l'UAI puisse offrir un autre accès à ses informations (notamment sur ce que l'on appelle le *World Wide Web*, initié par le CERN à Genève). La négociation se poursuit en février 1995.

Il s'agit de voir dans quelle mesure une opération sur Internet est complémentaire au projet CD-ROM de l'UAI. L'un offre une visibilité qui se mesure immédiatement en dizaine de millions, l'autre un outil de documentation de plus en plus apprécié par les centres de documentation -- les deux étant complémentaires au livre. Les avantages de l'Internet par rapport au deux autres, sont:

- la possibilité pour les utilisateurs d'y insérer leur propre information (par ex. des corrections d'adresse, l'annonce d'une réunion, la traduction d'un texte) permettant ainsi une amélioration "décentralisée" des informations (étiquetées selon leur origine et fiabilité)
- la vitesse de mise à disposition des changements
- le coût relativement abordable pour un utilisateur intéressé mais non-engagé (c.à.d un non-abonné)
- le marché potentiel actuel et prévu pour les années à venir
- le coût abordable de la création d'une "vitrine" sur Internet pour un fournisseur comme l'UAI.

Il est clair que les informations en langue française de l'Annuaire auraient bien leur place dans une formule Internet. Il faut souligner que l'investissement de traduction pour le CD-ROM est également valable pour la mise sur Internet. Il y a actuellement peu de projets en langue française sur Internet.

5. Position de l'UAI

L'UAI, organisation nongouvernementale sans but lucratif, a financé jusqu'à présent l'ensemble de son informatisation. Il faut se rappeler que **l'UAI n'est subventionné que pour 2% de son budget**. Le financement d'une version française des descriptions des organisations internationales dépasse ses possibilités.

D'autre part, l'UAI ne tient pas à envisager un projet français exclusivement à court terme qui ne prend pas en considération les moyens de continuer l'exercice rédactionnel dans les années à venir. Une édition française ne serait ni intéressante, ni économique pour l'UAI si ce programme ne rentrait pas dans un cycle de production régulière. C'est à cette condition que les liaisons techniques et rédactionnelles entre la version anglaise et française peuvent être maintenues avec le maximum d'efficacité et le minimum d'investissement.

6. Evolution des expériences pilotes de l'UAI

L'UAI a pris l'initiative de sortir une version CD-ROM test en novembre 1993 qui comportait les notices descriptives anglaises (de 1993), françaises (de 1981), son calendrier, les problèmes mondiaux, et les statuts des organisations. Un accès via des mots clefs français et avec présentation des titres en français fonctionne de manière satisfaisante. Une démonstration aux autorités françaises en a été faite.

7. Situation technique actuelle...étapes en cours

Il est important d'investir dans l'amélioration de l'interface avec des utilisateurs non habitués, ne fût-ce que pour se mettre au niveau d'autres produits CD-ROM sur le marché (notamment pour rencontrer les besoins des utilisateurs DOS et ceux de WINDOWS avec couleur). L'UAI a procédé à cette amélioration dans la période février-novembre 1994 à ses propres frais.

Le travail a du être interrompu par la découverte de faiblesses dans la version du logiciel fourni des Etats-Unis en juillet 1994. Une version corrigée est prévue pour février 1995. La situation précise sur la question des droits de reproduction a également demandé une clarification à la fin de 1994. L'éditeur allemand Saur reste toujours très intéressé par la distribution du produit CD-ROM.

En février 1995, avec l'option Internet, la question qui subsiste est la nature exacte du processus de fabrication du CD-ROM, soit a l'UAI, soit par un sous-traitant.

8. Questions liées à la version française

Malgré différentes expériences avec la traduction automatique (SYSTRAN) en 1993, et malgré l'avantage des anciens textes de 1981, il semble qu'une traduction nouvelle est plus simple. En effet les traducteurs estiment passer autant de temps en vérifiant et adaptant des textes anciens qu'en partant directement des nouveaux. Cependant de nouvelles aides à la traduction deviennent disponibles (cf GLOBALINK). En fait tout cela dépend de la

philosophie et de l'organisation de l'équipe de traduction.

Il subsiste des questions clefs:

- à partir de quel moment faut-il entreprendre la traduction, par rapport:
 - à la rédaction du texte anglais
 - aux processus de production des publications en cours
 - à la date de mise en vente de la version CD-ROM initiale en anglais
- à partir de quel moment peut-on faire la traduction "automatique" des parties normalisées

9. Le défi logistique

Il est clair que **ce projet pose surtout des questions logistiques**. Les derniers points ci-dessus ne sont pas les plus importants. Ne fût-ce que pour l'édition anglaise, il s'agit d'orchestrer d'année en année une relation entre l'édition de différents ouvrages (dont l'annuaire est le principal) sous forme de livre, de CD-ROM et sur Internet. L'adjonction d'une version française des descriptions des organisations pose des difficultés majeures de parallélisme, comme le point précédent le souligne.

- comment assurer une bonne "logistique" pour intégrer les opérations suivantes par rapport à l'édition de 1981:
 - la traduction manuelle
 - la traduction automatique
 - la traduction de "mise au point"
- comment s'organiser pour la mise à jour de l'édition suivante

Il est nécessaire de souligner que, tout comme pour l'Annuaire anglais, la mise à jour des textes évolue vers une opération continue et sans fin. **Cette opération ne correspond plus du tout aux anciennes méthodes de rédaction d'un ouvrage**. Dans un contexte électronique, les rédacteurs de l'UAI pourraient se trouver dans des pays différents et les organisations décrites pourraient elles-mêmes introduire directement des informations, dans l'une ou l'autre langue, à contrôler par l'UAI. Cette approche s'applique également pour la traduction des textes.

Dans ces conditions, où l'on peut compter sur peu d'éléments stables, que ce soit sur le plan de la technologie ou sur le plan du personnel, il semble peu approprié de chercher un parallélisme absolu des textes, surtout avec le risque des facteurs suivants:

- présence d'une description en anglais, sans la possibilité de la traduire (faute de temps, ou faute de ressources)
- présence d'une description en français, sans la possibilité de la traduire (faute de temps, ou faute de ressources)
- mise en question d'une description dans l'une ou l'autre langue, par l'organisation concernée, retardant ainsi sa publication

En fait, le logiciel doit marquer (c.à.d "dater") les éléments d'un texte modifié qui n'ont pas encore été contrôlés par rapport à la traduction. Ce processus peut lui-même soulever des difficultés techniques.

Le question principale est donc d'envisager un processus de traduction en fonction des ressources -- permettant ainsi un certain degré de traduction si le budget (et les délais) n'est pas adéquat pour une traduction intégrale.

10. Contributions financières à la version française

Des contacts ont été pris auprès des autorités gouvernementales: la Communauté française de Belgique, la France, le Québec, la Suisse, l'Union européenne, et l'ACCT. Les autorités françaises ont montré leur sensibilité au projet et ont versé une certaine somme, que l'UAI a bloqué en attendant que l'on décide si l'entreprise sera engagée ou non. L'éditeur allemand de l'UAI a promis un certain soutien. Il faut rappeler que les autorités françaises, ainsi que l'ACCT, ont contribué à l'édition française de 1981.

11. Approches possibles

La politique statutaire de l'UAI tend à assurer à son action la diffusion la plus universelle possible. Sa conception de l'utilisation du CD-ROM et de l'Internet comme instruments futurs de diffusion, lui fait donc préférer, pour ce qui la concerne, **une démarche où de multiples utilisations seront possibles.**

Cette approche concorde avec l'évolution actuelle de l'informatique vers une intégration, de plus en plus poussée, et des éléments d'informations, et des cadres linguistiques. **L'ouvrage disparaît en tant que tel en faveur d'un accès à des pages descriptives de sources multiples.** Il faut bien se rendre compte que les descriptions anglaises elles-mêmes sont loin d'être statiques. Elles sont adaptées de jour en jour au long des années. A l'avenir de telles modifications risquent d'être apportées journalièrement par les organisations concernées. Dans ce contexte même la notion "d'édition" disparaît.

La démarche préférée correspond en outre à ce qui constitue pour l'UAI une condition *sine qua non* de l'entreprise, ainsi qu'elle l'a indiquée dans une lettre datée du 7 février 1992 au Quai d'Orsay: **c'est que l'effort ne doit pas porter sur une traduction figée et unique comme en 1981, restant sans lendemain, victime des aléas des sources de financement.**

Il faut souligner les multiples possibilités techniques de séparer le produit "français" des autres langues si nécessaire. Cette séparation peut prendre la forme d'une "vitrine" unique (que ce soit sur CD-ROM ou Internet) ou de "vitrines" liées aux autres "vitrines" d'accès. L'accès aux descriptions françaises ne doit pas nécessairement empêcher l'accès à la version anglaise, et vice versa. La possibilité de comparaison entre les deux versions peut être souhaitée par certains utilisateurs. Il est important de reconnaître qu'**une "vitrine" française peut également permettre un accès à d'autres données** (calendrier des réunions, descriptions des problèmes mondiaux, données biographiques, etc) **même si ces informations ne sont pas encore disponibles en français.** Il sera donc possible d'accéder aux informations en anglais avec des clefs d'accès en français.

11.1 Option "traduction permanente"

S'agissant d'une continuité d'opérations, d'année en année (sans notion "d'édition" figée), dès le départ on prévoit de maintenir à jour les textes prioritaires, définis le plus largement possible selon la disponibilité des ressources.

Prévisions budgétaires étalées ou globalisées:

(a) mise en place de la logistique nécessaire pour la traduction permanente des textes prioritaires: 400.000 FF

(b) traduction de ces textes et utilisation de la traduction automatique: 300.000 FF

(c) traduction des autres textes: 300.000 FF
Budget: 1.000.000 FF

Des budgets additionnels sont à prévoir si l'on veut maintenir indéfiniment le même niveau de traduction. Sinon on retombera dans l'option ci-après, une fois le budget initial épuisé.

11.2 Option "traduction partielle": en vue d'une traduction permanente

Dans le cas où les ressources disponibles n'atteindraient pas le montant ci-dessus, on pourrait à tout moment entamer une traduction "partielle" selon certains choix (organisations francophones, organisations établies dans des pays francophones, organisations employant la langue française comme langue de travail, etc). Cette traduction partielle créera le cadre nécessaire permettant de compléter la traduction ultérieurement.

Budget 300.000 FF ou plus

"ANNUAIRE FRANCAIS" SUR DOC-MEF ET INTERNET

CONCEPTION REVISEE DU PROJET

Ce document est une mise au point du document soumis au Comité Rouillon en février 1995 suite à des discussions techniques avec Madame Suzanne Richer, représentante de l'ACCT

1. Sommet de Cotonou: Il est convenu qu'il est souhaitable d'arriver à un résultat concret pour le Sommet de Cotonou de décembre 1995.

2. Priorités: Dans l'impossibilité d'arriver à une **traduction** complète pour cette date, faute de temps et faute de ressources adéquates, l'accent sera mis sur la **rédaction** de textes fournis en français par des organisations internationales employant la langue française. Des traductions seront faites uniquement dans des cas exceptionnels ou dans le cas de budgets supplémentaires.

3. Initiatives complémentaires: Trois initiatives pourraient ainsi être lancées en parallèle:

- **Rédaction:** L'UAI a déjà rajouté une phrase à des questionnaires-épreuves, en cours d'expédition pour l'Annuaire suivant, sollicitant des textes en français de la part des organisations utilisant le français (et à qui le questionnaire est adressé en français de toute manière). Des réponses arriveront de manière continue durant les mois à venir.

Il est extrêmement difficile de prévoir le **taux de réponses** en français, et la qualité de sa présentation, surtout pendant les mois d'été. Ainsi le maximum d'effort sera déployé pour faire ce qui est possible avec l'information dont on dispose semaine par semaine, en soignant les cas prioritaires.

- **Récupération:** Afin de profiter de la version en français datant de 1980, un travail de récupération sera mené en parallèle (voir Tableau 1). Ce travail comportera une série d'étapes. Certaines de ces étapes sont "automatiques", d'autres impliquent un travail individuel, si les ressources sont disponibles pour des cas prioritaires.

- **Traduction:** Dans la mesure où des ressources supplémentaires deviennent disponibles, un travail de traduction pourrait être entrepris. Ceci pourrait se limiter aux cas prioritaires, surtout les organisations francophones qui ne répondent pas à la demande par questionnaire, ainsi que certaines organisations intergouvernementales importantes (voir Tableau 1). Le travail de traduction pourrait être organisé par champs descriptifs (p.ex. "Finance") pour un groupe d'organisations et non par description entière.

5. Logistique: La clef de la réussite est dans la logistique de l'opération et la détection des procédures de raccourcis. Dans la mesure du possible, les réponses en français remplaceront les textes de 1980 et les opérations de traduction "de fond". Celles-ci pourraient s'avérer essentiels pourtant dans certains cas prioritaires (ou dans le cas d'une intervention budgétaire exceptionnelle "pour la traduction"). L'UAI expérimentera l'emploi d'un "scanner" pour réduire une entrée manuelle inutile. Cependant l'arrivée de textes exigeant un grand reformattage, ou même une rédaction complète, est à craindre. Des opérations d'ordinateur éviteraient l'entrée des textes qui peuvent être transposés automatiquement de la version anglaise. La logistique visera à bénéficier le mieux possible des trois initiatives complémentaires ci-dessus et par rapport à chaque organisation à traiter.

6. Gestion des contacts à minimiser: Dans la mesure du possible, et sauf exception, il est important d'éviter des échanges de courrier individuel avec les organisations en question. La possibilité de faire traiter certains éléments en dehors du Secrétariat de l'UAI, par des collaborateurs extérieurs, exige une

vigilance dans la mesure où cela pourrait donner lieu à des complications de compréhension mutuelle, de préparation de travail, de conversion des données, de cas exceptionnels, etc. L'UAI ne disposera pas des ressources humaines pour ces échanges, surtout pendant les mois d'été.

7. Parallélisme: Un parallélisme exact entre les versions anglaise et française ne sera pas cherché. Dans un cas donné, l'une pourrait être "plus riche" que l'autre, éventuellement en faveur de la version française. Dans sa présentation, un accent sera mis sur la date de l'information, éventuellement au niveau du champ (p.ex. "Buts.....(1980)").

8. Approche expérimentale: Il est fort probable que les informations anglaises de l'UAI seront mises sur Internet dans les mois à venir. Une version expérimentale des textes français "récupérés" et "augmentés" pourrait y être ajoutée. Cette approche correspond à celle de beaucoup d'autres initiatives expérimentales déjà sur Internet. Ceci pourrait même provoquer des mises à jour en français.

9. Relecture: La nature du projet exigerait une attention spéciale à la relecture des textes.

10. Interfaces en français: Il est important de se rappeler les autres possibilités de "mises en français", d'initiative de mise sur DOC-MEF et Internet:

- **interface générale:** Dans le cas du DOC-MEF, il s'agit de l'interface Folio (logiciel commercialisé), dont une version existe en français. Dans le cas de l'Internet, il semble ne pas exister des "web browsers" en français (équivalent au Mosaic/Netscape), mais des textes d'explication peuvent être incorporés dans des documents HTML (format exigé pour un accès sur le "World Wide Web", lancé par le CERN).

- **clefs d'accès:** Dans le cas du DOC-MEF, où tout est indexé, les mots clefs ne posent pas de problème. La difficulté existe au niveau d'un accès par sujet non-indexé à travers un thesaurus éventuel. Il y a donc avantage à prévoir un contrôle du thesaurus et son équivalent en français actuellement employé à l'UAI. Dans le cas des documents HTML en Internet, le thesaurus de l'UAI pourrait être incorporé dans des documents, mais la nécessité de le contrôler et compléter existe. Le même travail vaut pour le DOC-MEF comme pour l'Internet.

- **autres bases de données:** Dans les deux cas, l'UAI envisage d'accompagner la base de données "organisations" par d'autres bases de données complémentaires, notamment sur les "problèmes mondiaux", les "stratégies", les "statuts", les réunions internationales. Il n'est pas question à ce stade-ci d'envisager des textes en français dans ces cas, bien que des statuts d'organisation pourraient facilement être incorporés en utilisant un "scanner". Par contre, toute solution pour l'interface générale "organisation" vaudrait pour ces autres bases de données. Et tout travail sur le thesaurus vaudrait également pour les clefs vers ces bases de données. Avec un minimum d'investissement supplémentaire, des titres des notices descriptives dans certains cas (p.ex. les "problèmes mondiaux") pourraient être traduits afin de les indexer. Ainsi une "surface" d'accès francophone pourrait être aménagée vers une masse d'information avec un minimum d'effort.

- **traduction automatique:** La possibilité d'accrocher une routine de traduction aux outils fournis à l'utilisateur n'est pas à négliger. Ainsi un utilisateur qui aboutit à un texte en anglais pourrait profiter d'une traduction "primitive" en français sur le champ. Cette possibilité demande des essais. Il se peut que le problème est moins technique qu'une question de droit d'auteur pour le logiciel en question.

11. Interconnexions des bases de données: L'UAI compte assurer, que ce soit en DOC-MEF ou en Internet, la possibilité pour l'utilisateur de passer (avec une opération de souris) de notice descriptive à notice descriptive, et éventuellement vers d'autres bases de données. Ainsi la description d'un problème pourrait conduire l'utilisateur vers une organisation qui s'en occupe et de là vers ses statuts, vers la description biographique de son secrétaire général, ou vers ses partenaires ou membres. Ces opérations pourraient être entamées à l'aide d'une interface française, appuyé par des index en français, et aboutissant à des textes en français là où cela a été possible et là où le besoin se fait ressentir. Ces possibilités évolueront avec le temps et la collaboration des utilisateurs réagissant à des faiblesses dans

l'outil, dans les descriptions, et par rapport aux liens hypertextes en elles.

UIA OPTIONS FOR CD-ROM and/or INTERNET

INTRODUCTION

It is important to recognize that a new era of electronic publishing is starting. The UIA is especially well-placed to benefit from the opportunities. Software and hardware are becoming available to facilitate the activities of small electronic publishing houses.

The range of options with respect to CD-ROM and Internet is:

- complex
- changing rapidly (even month by month)
- unpredictable over a period of a year

At the same time:

- costs of products are coming down
- others are acting or interested in UIA domains

The complicating issues are:

- obtaining software
- obtaining software implementation know-how in a new area
- avoiding copyright issues to ensure UIA control
- security of UIA data (preventing abusive copying)
- keeping sub-contracting costs down

A positive factor is that work for the CD-ROM is in part valid for Internet (or vice versa), notably for any French translation.

In this fluid context, it is nevertheless important for the UIA to act in the near future, if only to fulfil the commitment to Saur. The situation is unlikely to get any simpler or more stable in the foreseeable future.

OPTIONS

1. Hypertext publishing tools

There is now software available which appears to be able to take UIA databases and convert them into hypertext files which can be accessed, either on CD-ROM or on Internet. It is specifically designed for small "electronic publishing houses".

The main software challenge is to convert files into a format called HTML (hypertext marker language). This is the industry standard version of what the UIA has effectively achieved already with its own software (which is however incompatible with the essential industry retrieval tools).

A multitude of such software tools for "authoring" text databases for CD-ROM or Internet are about to become available. What was carefully kept as a mystery months ago, is now becoming accessible to relatively unskilled end-users.

This approach would mean that UIA would "go it alone", avoiding the cost of software consultants to construct the files required for either CD-ROM or Internet. Given the rapidly changing situation, it is to be expected that UIA will be obliged to explore several forms of output in parallel, whether on CD-ROM or on Internet.

2. CD-ROM production

There are two basic alternatives here:

- UIA sub-contracts disk production
 - reduces capital investment
 - increases testing costs
 - reduces flexibility

- UIA purchases CD-ROM recording unit (producing WORM disks)
 - capital investment
 - increased testing flexibility
 - increased production flexibility

The second option is now definitely more attractive (and has been **implemented, February 1995**), if the UIA is prepared to be in an "experimental" mode. The alternative involves unpredictable costs over the future.

It is to be expected that some work will continue to be sub-contracted, notably multiple printings from a single WORM disk.

3. Software for CD-ROM

3.1 UIA Revelation on CD-ROM

This is the option on which UIA has been working and which is close to completion. It involves:

- using an adapted version existing UIA software
- agreeing a distribution licence with Revelation (agreed)
- completing the final interface, which will remain an ongoing activity
- producing the CD-ROM

The new release of Advanced Revelation is scheduled to be available February 1995. This should allow completion of some aspects which have been subject to bugs in the previous version.

At this point, this option is the only way of ensuring the full richness of access to UIA databases. However it may be perceived as somewhat primitive from a cosmetic point of view. Also the security issues may be a major problem. It cannot be directly adapted to Internet.

Note that the Windows version of UIA Revelation, called OpenInsight, will require much more work if it is to be implemented. It has however been bought.

Note that in signing the software license, the UIA has committed to communicating the addresses to which the product is sold to Revelation Technologies, although they seem to appreciate that only intermediary addresses may be possible in some cases.

3.2 Folio Infobase

This off-the-shelf package is cruder in many respects than the UIA software but seems to have the following advantages:

- fully tested
- allows import of UIA files
- much indexing flexibility
- licensing problems seem to have been resolved

- a saleable product can be made available rapidly
- users can add their own notes to entries
- flexible reconfiguration
- additional features could be programmed in (extra costs)

Infobase exists in DOS and Windows versions, but it seems that no reduction is available if both are purchased together.

3.3 Other packages

Discussions concerning other software approaches continue.

4. Internet

4.1 File conversion for Internet

Whilst this may be possible through Infobase, options for the conversion to HTML is possible. Some can be purchased as an experiment to gain familiarity and discover what the issues are of UIA file conversion.

4.2 Adapting UIA application for Internet

As a major commercial growth area, several access and/or service providers are presenting their options to UIA. Major variants are:

- write software from scratch
- adapt an existing package
- off-the-shelf package

Some of these approaches are designed to create dependence where this might not be satisfactory. The UIA should avoid, to the extent possible, the traditional problem of getting "locked in" to a particular technology.

Home-pages: The home-page is the screen users first see when they log onto UIA on Internet. It is also called a "shopwindow" through which users can see, and gain access to, the range of UIA databases. Several distinct home-pages might be produced, notably one for the French yearbook. Increasingly consultants and others (like EUNET) are proposing their services to produce such homepages. They are not very difficult to produce, so UIA needs to avoid becoming dependent on this expertise, especially if the consultants want to make the homepage their own property (as with a photographic negative).

4.3 Web server

In order for UIA data to be accessible on Internet it has to be "placed on a Web server". There are several options for doing so:

- through an Internet service provider to whom UIA sends its data requiring payment of rental costs
- via an Internet service provider with a connection from a UIA separate computer data remains at UIA a hardware investment is required
- on UIA's own "web server" as for the previous but possibly much more complex

Ideally the UIA should:

- develop its own Internet application
- test it on its own server, using network browsers (like Mosaic or Netscape)
- seek offers from Internet providers to "place it on their computer".

The main issues here are:

- rental cost
- security
- accounting
- relationship with books (Saur), CD-ROM (Saur), and UIA "partners"

5. Data made available: strategic issues

The three key issues are:

- maintaining/increasing income (at whatever speed occurs the expected slide from books towards CD-ROM and Internet access on the part of users)
- security of UIA data
- marketing complementarity between electronic and book publishing (Internet, with "35 million" subscribers, is too good an opportunity for marketing books and CD-ROM)

A balance must be sought between books, CD-ROM and Internet access. This balance is expected to change over time. At this point the value of the three may be seen in the following terms:

- books:
adv: established market and pattern of usage; convenience
dis: production costs; static/declining market; size constraints now exceeded; minimum print run constraints
- CD-ROM:
adv: flexible access to a wider range of information; lower production costs; "personalized" products
dis: limited market; necessarily high sales price; data security
- Internet:
adv: access to a much wider potential market; user response (for ordering and for supplying new information); non-commercial databases; more frequent update
dis: inconvenience to regular user; data security

The key to any strategy is therefore how to use data placed on Internet to point users towards the CD-ROM and book versions. This necessitates putting enough data on Internet "for free" to act as an "appetizer" (in competition with other such appetizers on Internet). Users wanting more can then either be pointed to books or CD-ROM, or can pay a subscription to a higher level of data via Internet. Many publishers are currently faced with this dilemma.

The UIA is not free to choose between these strategies. Constraints are:

- valuable contractual commitments to book production (Saur, Calendar) and markets
- competing suppliers of data (Gale, ICCA/Elsevier, UN/DPI, Threshold, subsets)
- pressure from users for cheaper information

- free information already supplied on Internet (notably meetings)
- limited exposure of UIA products outside library market

6. Data made available: segmenting products

Option 6.0:

C. CONCLUSIONS

The UIA is in the fortunate position of being able to avoid long-term commitment to any particular supplier or mode of action. In the very fluid strategic situation of electronic publishing, both the CD-ROM and Internet options must be pursued in parallel. Internet is recognized as vital for brief access whereas CD-ROM is important for "serious" users. In this sense the methods of distribution are complementary.

By avoiding sub-contracting as much as possible, using software packages that are becoming available, the UIA can experiment under reasonable level of risk.

Clearly Infobase on CD-ROM can be explored in parallel with the Revelation on CD-ROM option, once the UIA has a CD-ROM recorder (with its associated software). Both should lead to saleable products. In both cases the **security issues are the immediate fundamental concern**, followed by the marketing issues. Saur may wish to insist on multiple copy production for technical reasons. Saur will be very pleased to have a Windows-based product (Infobase).

D. UIA hardware/software investment implications

In addition to the specific software packages mentioned above (and the much-heralded new release of Windows late this year), the hardware investments involved are:

- CD-ROM recorder (with its software)
- a disk of suitable size (1 gigabyte) for CD-ROM preparation (to be attached to an independent work station to avoid disruption of recording sessions by network traffic)
- a stable environment for Windows testing (as indicated by recent difficulties with "Anne's" machine)

It is clear that with simultaneous work on Yearbook, Whos Who and Strategies (with stagiaires), in addition to Yearbook mailings and Calendar, and later the French Yearbook, there is need to consider:

- extra working disk space (possibly solved by the single gigabyte drive)
- a new HP printer (to replace the one purchased 10 years ago) for mailings, etc
- upgrade 2 extra machines (to 486, with local hard drive), or purchase new machines

The "web server" can be considered at a later stage.

With regard to the hardware purchases, a basic issue is whether they should be purchased through Getronics or by a cheaper route (with the question of maintenance).

These purchases need to be related to those resulting from the movement of JN to London. She (like NC) will need a machine with suitable disk capacity, a backup device, and possibly a modem to communicate with Brussels. There is advantage in purchasing these earlier so that they can be tested in Brussels (however the maintenance problem also needs consideration).

BACKGROUND TO CD-ROM ISSUES Annex 5

1. Background: The UIA continues to be faced with requests for direct access to its database. The on-line opportunities for the UIA seem to necessitate a phase of simple electronic mail before integrating in any database facility -- if that proves to be desirable.

Our publisher, K G SAUR Verlag, is however now distributing some major reference works on compact disk and sees this as a necessary new development of the publishing business. This possibility and SAUR's interest in it has been noted in this report over several years. It is important to recognize that there has been an initial period of enthusiasm in which a number of those who committed themselves prematurely (including Gale) have had unfortunate experiences. The situation is now much clearer to SAUR, although not especially promising. Essentially it is a question of positioning potential products in the CD-ROM market in anticipation of future developments.

SAUR is now actively negotiating the means of distributing UIA information in this form. Although the hardware is evolving, as outlined below, libraries and distributors are now committed to the simplest form of optical disk hardware (point (a) below).

2. Optical storage: The hardware for optical disk storage is evolving very rapidly :

(a) CD-ROM: The current widely available form (CD-ROM), especially attractive to libraries, does not allow the user to write onto the disk, and requires expensive means of production. UIA would certainly lose control of any data produced and distributed in this way -- especially through SAUR. **New software and hardware is now making it quite feasible for publishers (such as UIA) to produce their own CD-ROMs.** This is a very tempting option for the UIA with major long-term implications. The investment is however in the region of \$10,000. However it remains questionable whether UIA could acquire and maintain the level of technical expertise to do this. SAUR argues that it requires a high level of expertise to produce the kind of user-friendly product required by the market.

(b) CD/WORM: Less widely known is the form in which the producer writes once to the disk and the user accesses it as often as is required (CD/WORM). This form is relatively inexpensive for the producer, permitting tailor-made one-off products, and would

allow the UIA to develop its own independent relationship with users. The problem of losing control of the data remains but at least distribution control becomes easier. This could be implemented immediately. The snag is that the technology is evolving so rapidly that it is unclear how long any particular hardware standard will last, especially with the emergence of the third variety below. **The UIA has now abandoned consideration of this possibility.**

(c) CD/MO: Eraseable optical disks are now being released onto the market. Prices have now decreased to 90.000 FB for a 3.5 in. 128MB machine (156.000 FB for a 5.25 in 600MB). These will almost certainly prove to be a more attractive proposition than either of the above. It will be some considerable time before they reach the degree of standardization and acceptability of the CD-ROM variety. However they offer the immediate advantage that the UIA could copy its data onto such disks, and access it using existing software -- which could be progressively improved.

3. Negotiations with SAUR: Since 1991 there have been continuing discussions between SAUR and UIA on the CD-ROM possibility. A first round of discussions, ending mid-1991, was based on proposals from SAUR's Berlin sub-contractor. It became apparent that UIA would derive little benefit from the arrangement. UIA rejected the proposal.

A second round of discussions was then initiated by SAUR through Computaprint (London). This company has been responsible for processing the Yearbook since 1984. In 1986 it became a cousin of SAUR, since both are now part of the REED group. Within REED there is also On-Line Computer Systems (USA) and a group called REED Opti-Ware (London). It is the USA group which has the CD-ROM expertise that is being used by REED Opti-Ware with Computaprint as the interface with UIA. In mid-1992 these discussions also reached a point at which SAUR decided to terminate the project because of the costs.

A third round of discussions has been initiated following an exchange of memos. It is clear that SAUR and UIA are confronted with a problem for which the CD-ROM provides a solution. The problem relates to the space demands of the data and the marketing demands for specialized and cheaper publications.

The commitment by SAUR to produce the CD-ROM in 1993 has now been modified for "fiscal" and "marketing" reasons. The intent is now to develop the CD-ROM in the last quarter of 1993 but to produce it in early 1994 -- depending on the Yearbook production

cycle. This makes the inclusion of the French edition (see below) on that CD-ROM much more feasible.

A draft contract developed by UIA is under discussion (see Annex I) and signature is expected within the April-May period. This is designed to take account of many of the production and marketing issues of the different combinations of databases that might be placed on the CD-ROM.

4. Principal issues and complicating factors:

(a) Market demand: SAUR will go ahead with the CD-ROM development and has already loaned/given a CD-ROM unit to the UIA to ensure some familiarity with the possibilities.

(b) Eraseable disks: It appears very desirable for the UIA to acquire an eraseable disk, if only to resolve and rationalize daily backup and disk space problems, as well as communication with London (for which the current tape unit is increasingly unsatisfactory). This could then be used by the UIA to produce disks for use on other installations similarly equipped (starting with London).

(c) Control of data: The fundamental issue of "giving away" the complete UIA database, in one form or another, remains to be addressed.

(d) Regional and specialized directories: Given the current transformation of Europe, there is a place for a directory of European organizations produced by the UIA, especially in the light of the emergence of interest by other publishers in producing such a volume. The same may be said for various specialized directories (sport, medicine, development, etc). In the past such proposals have been made for paper versions and SAUR has rejected them for marketing reasons. Within a CD-ROM environment these become credible as separately marketed segments of a single disk.

(e) Inclusion of non-Yearbook information: whether the CD-ROM would be limited to the Yearbook or include the Calendar information, etc

(f) Inclusion of French version of Yearbook: Whether the French version of the Yearbook (see below) could be included on the same disk. Discussion of this issue with SAUR and with the French Government has proved very complex and has effectively delayed implementation of the CD-ROM as initially conceived in its simplest form.

(g) Segmental marketing: Whether portions of the disk could be separately marketed by use of special software "keys". Especially difficult are the royalty issues in relationship to these possibilities.

(h) Independence from SAUR: The CD-ROM related initiatives offer a unique opportunity to consider operating with a greater degree

of independence from SAUR, without necessarily losing the advantages of that distribution network. It is possible that the SAUR product could be limited to a simpler product, with the UIA taking responsibility for the many variants on tailor-made CD/MO products.

(i) Royalties: SAUR is currently offering 6 percent royalties on the list price, arguing that all "editorial costs" are covered by the hardcopy versions (certain production costs will be separately invoiced by UIA). Assuming sale of 100 copies of the CD-ROM selling at approx. 30.000 FB (for the Yearbook part at least), this would mean total royalties of only 1.800 FB per disk (namely a total of 180.000 FB) for a great deal of work by the UIA in responding to the production requirements. Against this would have to be set the advantage of the greater visibility of the UIA products. This needs to be compared to UIA production of its own CD/MO, for which the actual production costs would be very low.