International Federation of Library Associations and Institutions

Cataloguing Section

FRBR Review Group

Meeting Report

Lyon, France, Sunday, August 17, 2014

Business meeting attended by all 9 members, all members of the Consolidation Editorial Group, one corresponding member, and 12 observers (see Appendix A).
Regrets:. François-Xavier Pelegrin (ISSN liaison)

1) Welcome and Announcements

FRBR Review Group working meeting is on Friday, August 22nd, at l'Ecole nationale supérieure des sciences de l'information et des bibliothèques, 9:30 to 17:30. Thanks to enssib for generously offering their facilities. The meeting will focus on the consolidation of the three FR models.

Invitation from the ISBD Working Group on Linked Data to attend their meeting on Thursday, August 21st held off-site at enssib. They will be discussing their mapping between ISBD and FRBR and would appreciate our comments.

2) Agenda and minutes

Agenda approved as circulated with one addition – follow-up on www.frbr.org domain name
Minutes of the 2013 business meeting approved as circulated.

3) Membership changes: Felipe Martinez resigned in December, 2013. Miriam Säfström has tendered her resignation, effective at the end of WLIC 2014. However, since we had expanded to 10 members in 2013, the RG will still have eight members despite the resignations.

4) Chair's report

a. The Chair summarized the content of the Report of activities, 2013-2014 (see appendix B).

b. The Chair commented on last year's decision to introduce a new organizational structure to advance consolidation by creating the Consolidation Editorial Group (CEG). This new organizational structure seems to be very successful judging from the advances made towards consolidation in the past year.
c. A brief report on Review Group activities was published in the Classification & Indexing newsletter, June 2014
d. The new IFLA procedures manual will have an impact on the work of the RG because it affects the approval and publishing of IFLA standards, including conceptual models. We will need to start integrating the communication and approval guidelines as the consolidated model nears completion.
e. The Chair also briefly introduced two topics that are part of the meeting's agenda:
    i. the statements of endorsement of FRBRoo and PRESSoo

[**Background**: FRBRoo is an object-oriented interpretation of the FRBR, FRAD and FRSAD models. PRESSoo is an extension of FRBRoo that models bibliographic information relating to serials. While FRBRoo presents a unified interpretation of the three models, it is a distinct and different model from the consolidated model. FRBRoo is intentionally harmonized with the CIDOC CRM model and represents the result of dialogue with the museum community to arrive at common ground in order to support data interoperability. The consolidated model is intentionally more general and abstract than FRBRoo; it is not an interpretation of the three original models, but a remodelling of the three into one coherent and consistent conceptual model.]

    ii. the possibility of establishing a protocol between the Joint Steering Committee for Development of RDA and the FRBR Review Group.

5) Report from the Consolidation Editorial Group

5.1 Brief progress report

Pat Riva gave a synopsis of the work accomplished during the year. The CEG met twice during the year, once in the fall and once in the spring: October 14-15 in Paris; March 31-April 4 in Den Haag. Details of the consolidation were not discussed during the business meeting but were reserved for in-depth discussion during the all-day meeting on consolidation (August 22). The focus during the year was reviewing the attributes of the entities, streamlining some, suggesting changes to achieve a comparable level of granularity. Relationships were also reviewed. In some cases, something previously identified in one of the models as an attribute was considered to fit better into the consolidated model as a relationship, for example, subject. Since the CEG is taking charge of the consolidation project, the project funds request came directly from the CEG, with the Review Group's endorsement. So Pat also reviewed the funding situation. Pat also revealed some of the ideas for the presentation of the model: a document in

tabular format instead of discursive text, but with a discursive overview and introduction. The final document will probably include a brief bibliography and a section describing the relationship between the consolidated model and the three original models. The plan is also to retain access to the three original models by maintaining an archive on the IFLA website. Members of the CEG stressed the importance of the Friday meeting because the CEG needs confirmation of support from the whole Review Group for the basic structure of the consolidated model and for the decisions the CEG had made.

5.2 Special project funds

The request for 2014 funding was for €4000 to cover two meetings devoted to consolidation work. We were successful in obtaining €3000 (plus €400 was carried over from the previous year to cover cost of uploading FRBRoo data to OMR). Conditions were more restrictive than in the past: the allocation was designated for one meeting only, the spring meeting; reimbursement of expenses was only for individuals explicitly named as project team members. The spring meeting did not use all the allocated funds: approximately €2400 were spent to support the attendance of four people at the Den Haag meeting. Approximately €600 remain. It is not clear whether there will be IFLA approval to spend the balance on expenses related to a second meeting in the fall.

6) Report from the WG on FRBR/CRM Dialogue (also known as the FRBR/CIDOC CRM Harmonization Working Group)

6.1. There were two meetings of the Working Group which occurred at the same time as the meetings of the CIDOC CRM Special Interest Group: 21 - 25 October, 2013, in Heraklion; 2-4 April, 2014, in Den Haag. The Review Group was well represented at both meetings by Patrick le Boeuf, Pat Riva and Maja Žumer. Chris Oliver was able to attend the spring meeting. There were further decisions and adjustments of version 2 of FRBRoo which is very close to being completed. FRBRoo ver. 2 extends ver. 1 by incorporating properties and relationships corresponding to the entities and relationships modelled in FRAD and FRSAD. There was also further discussion of PRESSoo, the extension of FRBRoo for serials. The CIDOC CRM SIG principally represents the museum community. But at the Den Haag meeting, there was the beginning of dialogue with the archival community in order to extend the conceptual modelling to encompass archival data.

6.2. Statements on the relationship and compatibility between FRBRer/FRAD/FRSAD and FRBRoo and PRESSoo

Two draft statements prepared by Patrick LeBoeuf (member of the Working Group on FRBR/CRM Dialogue) had been circulated to members of the Review Group. If approved by the Review Group, the two statements would express the Review Group's

endorsement of these object-oriented models as having a valid relationship with FRBRer/FRAD/FRSAD. The full text of the statements is included in appendix C.

The two statements received unanimous approval from all the members. A suggestion was made to go beyond RG endorsement and take the two models through the formal IFLA approval process for standards. The suggestion was approved by all and made into an action plan for the Review Group. This decision was communicated to the Cataloguing Section and the Classification and Indexing Section during their 2nd meetings.
[**Post-meeting clarification**: Since version 1 of FRBRoo had already been approved in 2010, version 2 will be taken through the IFLA process for updating a standard.]

6.3. The schedule of meetings for the WG: week of September 29, 2014 in Heraklion, and week of February 9, 2015 in Sweden, to coincide with the meetings of the CIDOC CRM SIG.
[**Post-meeting clarification:** venue for the February 2015 meetings was changed from Sweden to Oxford, England.]

7) Possibility of establishing a protocol between the Joint Steering Committee for Development of RDA (JSC) and the FRBR Review Group

Gordon Dunsire, in his role as the Chair of JSC, presented the proposal which had been circulated to members of the RG before the meeting (text is in appendix D). The protocol would ensure formal communication between the two groups, communication that so far has been informally achieved through the accident of committee memberships (such as Gordon being both a member of JSC and of the Review Group). The protocol would ensure that each party would be informed of possible major changes that might have a significant impact. It would also guarantee cooperation in the development of mappings between the FR family of models and RDA. The Review Group agreed with the idea of developing such a protocol with JSC. However, the draft document is based on the wording of the protocol between JSC and the ISBD Review Group. Certain phrases make sense for a dialogue between groups responsible for different cataloguing standards. However, those phrases do not necessarily make sense when the dialogue is between a group responsible for a conceptual model and a group responsible for a cataloguing standard. The actual wording for the protocol will be developed and approved later.
[**Post-meeting clarification**: JSC expects the FRBR Review Group to write a new draft of the protocol.]

8) Namespace update

Gordon Dunsire reported that namespace data for FRBRoo has been prepared in spreadsheet form to be bulk uploaded into the Open Metadata Registry (OMR) so that it

can be housed there along with the other FRBR namespaces. The actual loading has been delayed due to scheduling issues, but should still occur before the end of 2014; 400 euros has been allocated in this project for the one-time programming expense relating to the upload. Further updates will then be done manually within the OMR.

9) The domain name from FRBR blog: www.frbr.org. Bill Denton has stopped using the site. Miriam was unable to reach him to discuss transfer of the domain name.

10) Updates from other projects, groups, etc.
Not done for lack of time.

11) Other business
Not done for lack of time.

Decisions about the 2015 meetings in Cape Town were made at the Friday meeting:
One business meeting and an extra meeting during the conference; one consolidation meeting, full-day after the conference (Friday, August 21st).

12) The meeting adjourned at 16:07.

Meeting Report

Lyon, France, Friday, August 22, 2014
9:30-17:30, at enssib

1. 16 people attended the consolidation meeting, including 5 observers.

2. A brief plan for the day was outlined and approved.

3. Brief summary of the day's work:

The day-long meeting began with an overview of outline of the final document. There will probably be eight sections and these were described: introduction (context, approach used), methodological introduction, user tasks (and users considered), overview of the model, formal model definition, aggregates (interpretation of aggregates in the model), appendices (tables matching user tasks and attributes/relationships), bibliography. A transition document mapping the three existing models to the consolidated model will be issued as a separate companion document.

There was a PowerPoint presentation describing the salient aspects of the consolidated model and focusing on the key points where the CEG needed the Review Group's approval of decisions they had made so far. The CEG has been aiming to provide a high-level model in an entity-relationship framework. While the experience of developping FRBRoo has been informative in a number of areas, the CEG has avoided incorporating all aspects of FRBRoo in the consolidation, as FRBRoo is in several respects more detailed than the level of granularity the CEG is aiming at. The Review Group agreed with the direction taken by the CEG and with the decisions about entities, relationships and attributes. The Review Group also suggested that the CEG consider defining entities and relationships instead of having similar attributes for several entities. Agreement on the bare bones of the model allows the CEG to progress towards completing the first draft. The CEG planned to review the model for consistency and completeness and then begin filling in the text of the model, definitions, explanations, overview, etc.

It was a very full day, with a brief break in the park for lunch. However, even during lunch, consolidation was the topic of discussion as CEG and Review Group members discussed possible names for the consolidated model. There was no decision about the name, but there were interesting and thought=provoking suggestions:

Functional Relationships between entities

then revised to: Functional Relationships between resources

Fundamental Relationships between resources

Functional Relationships for bibliographic retrieval

Fundamental Architecture for bibliographic retrieval

Fundamental representation of bibliographic resources

Functional representation of bibliographic resources

LRM (Library Reference Model) or RM (Reference Model)
FRBR-LRM
CLIC (Catalogue and library information conceptualization)
Framework for Representing Bibliographic Relationships [a post-meeting suggestion]

4. 2015 meetings in Cape Town
   Decision: One business meeting and an extra meeting during the conference; one consolidation meeting, full-day after the conference (Friday, August 21st).

The Review Group briefly discussed plans for WLIC 2015 in Cape Town: one business meeting (2 hours)with an extra meeting scheduled during the conference (in case the business meeting has many items on the agenda or the CEG want to confer with people who may be unable to attend the Friday meeting). There will also be a full-day meeting to discuss the consolidated model at the end of the conference, on Friday, August 21st.

Appendix A – List of participants

Name	Institution	Country	Status
Balikova, Marie	National library of the Czech Republic	Czech Republic	corresponding member
Bertolini, Maria Violeta	Instituto de Formación Técnica Superior No. 13	Argentina	observer
Clavel, Thierry	RERO	Switzerland	observer
Dunsire, Gordon	Independent	UK	member
Escolano Rodriguez, Elena	Defense Ministry	Spain	member
Gentili-Tedeschi, Massimo	Biblioteca nazionale Braidense, Milano	Italy	observer
Guerrini, Mauro	University of Florence	Italy	observer
Hostage, John	Harvard Law School	USA	observer
Howarth, Lynne	iSchool, University of Toronto	Canada	observer
Kavčič, Irena	National and University Library	Slovenia	observer
Le Boeuf, Patrick	Bibliothèque nationale de France	France	member, member of Consolidation Editorial Group
Leresche, Françoise	Bibliothèque nationale de France	France	member
McGarry, Dorothy	University of California, Los Angeles	USA	observer
Merčun, Tanja	University of Ljubljana	Slovenia	member
Meyers-Hess, Anke	Deutsche Nationalbibliothek	Germany	member
Morris, Susan	Library of Congress	USA	observer
Oliver, Chris	McGill University	Canada	Chair of RG
Patton, Glenn	OCLC	USA	observer
Riva, Pat	Bibliothèque et Archives nationales du Québec	Canada	Chair of Consolidation Editorial Group
Säfström, Miriam	National Library of Sweden	Sweden	member, member of Consolidation Editorial Group

Salaba, Athena	Kent State University	USA	member
Santos, Ricardo	National Library of Spain	Spain	observer
Seppälä, Marja-Liisa	National Library of Finland	Finland	observer
Žumer, Maja	University of Ljubljana	Slovenia	member of Consolidation Editorial Group

Appendix B – List of participants at the consolidation meeting

Name	Institution	Country	Status
Balikova, Marie	National library of the Czech Republic	Czech Republic	corresponding member
Dunsire, Gordon	Independent	UK	member
Escolano Rodriguez, Elena	Defense Ministry	Spain	member
Gentili-Tedeschi, Massimo	Biblioteca nazionale Braidense, Milano	Italy	observer
Le Boeuf, Patrick	Bibliothèque nationale de France	France	member, member of Consolidation Editorial Group
Le Pape, Philippe	ABES	France	observer
Le Provost, Aline	ABES	France	observer
Leresche, Françoise	Bibliothèque nationale de France	France	member
Merčun, Tanja	University of Ljubljana	Slovenia	member
Meyers-Hess, Anke	Deutsche Nationalbibliothek	Germany	member
Oliver, Chris	McGill University	Canada	Chair of RG
Riva, Pat	Bibliothèque et Archives nationales du Québec	Canada	Chair of Consolidation Editorial Group
Roe, Sandy	Cataloging and Classification Quarterly	USA	observer
Salaba, Athena	Kent State University	USA	member
Weitz, Jay	OCLC	USA	observer
Žumer, Maja	University of Ljubljana	Slovenia	member of Consolidation Editorial Group

IFLA Cataloguing Section
FRBR Review Group

Report of activities
2013-2014

Membership

According to the terms of reference for the Review Group, membership may vary between eight and ten members. Up until 2013, membership had basically been eight members. 2013 was an election year and the Review Group expressed its appreciation to the members who had completed their terms: Pat Riva, former chair of the RG, Maja Žumer, and Rajesh Chandrakar. When five nominations were received, the Working Group proposed to the Cataloguing Section that it would like to accept all five nominations and expand its membership to ten members. During the Cataloguing Section meetings in Singapore, this proposal was approved. Since then, the Review Group received two resignations from members of the Review Group, so the Group has returned to its former number of members, that is, eight members.

Translations

FRBR

Arabic

- translated by the King Fahad National Library (KFNL).

Bulgarian

FRAD

Bulgarian

FRBR is now available in twenty-two languages including English. FRAD is now available in fourteen languages including English. There were no new translations of FRSAD. FRSAD is available in six languages.

Consolidation of IFLA Conceptual Models

Consolidation of the models is the principal activity in which the Review Group is currently involved.

The RG held one business meeting and one working meeting during IFLA WLIC in Singapore. The working meeting was an extended one (4 ½ hours long) to allow for a more detailed review and discussion of consolidation work.

During the IFLA 2013 conference in Singapore, the Review Group decided to form a Consolidation Editorial Group to lead the work of bringing the three conceptual models together

into one coherent model. Consolidation work had reached a point where it required a small group to gather the results of numerous consultations, to identify areas that still needed attention, and to start giving shape to the consolidated conceptual model. The members of this group are Patrick LeBoeuf, Pat Riva, Miriam Säfström, and Maja Žumer. The small Consolidation Editorial Group worked closely with the Review Group, summarizing discussions and decisions as they occurred, and even setting up Skype meeting opportunities so that Review Group members could be involved. While the group was designed to be small in order to have the agility to accomplish a challenging task, it always welcomed the interest and participation of the members of the Review Group and of related groups, such as the ISBD Linked Data Study Group. During 2013/2014, the Consolidation Editorial Group held two series of meetings. The first series were held in October (Oct. 14 and 15), in Paris, immediately preceding the meetings of the ISBD Linked Data Study Group. By arranging the meetings of the two groups within the one week, it provided an important opportunity for attendance by interested members of related IFLA groups and committees. The second series were held from March 31 to April 4th, in Den Haag, overlapping with the meetings of the CIDOC CRM Special Interest Group and allowing members to attend the relevant parts of the CIDOC CRM meetings (see below) in between their own meetings on consolidation. The Paris meetings were hosted by the Bibliothèque nationale de France, Paris. The Den Haag consolidation meetings were hosted by IFLA Headquarters. The Review Group thanks both institutions for their support of the project by providing excellent facilities for the meetings.

When the RG submitted its proposal for project funding to support the continuation of consolidation work, it submitted a 2-year plan. The project was called *Reassessment of properties in a consolidated conceptual model* and planned for 2013 and 2014 (project was approved in January 2013). Thus, it was not necessary to submit a detailed new plan to cover 2014 funding, but it was necessary to re-apply for 2014 funding. The project funding in both 2013 and 2014 was used to support the meetings held between the annual conferences in order to continue advancing the consolidation work. Since the project is now led by the Consolidation Editorial Group rather than the Review Group as a whole, the Chair and the past Chair decided that it would be more appropriate if a member of the Consolidation Editorial Group acted as the project leader. Pat Riva volunteered to act as the project leader and to be the contact point for administrative aspects, especially related to IFLA funding.

Working Group on FRBR-CRM Dialogue

The Working Group on FRBR-CRM Dialogue held two meetings during 2013-2014: the first in mid-October, in Heraklion, Crete, and the second in early April, in Den Haag. The meetings of this group are usually held at the same time and place as the CIDOC CRM Special Interest Group's meetings. IFLA was well represented at both meetings by its three long-standing members. The Review Group Chair was able to attend the April meeting. (This group is sometimes also called the International Working Group on FRBR-CIDOC CRM Harmonisation.) The group's main focus is FRBRoo, an object oriented formulation of FRBR/FRAD/FRSAD and an extension of the museum community's conceptual reference model (CIDOC CRM). As the models each develop, the group monitors changes to maintain harmony between the two.

Distribution List

The frbr@infoserv.inist.fr list currently has 791 subscribers, a slight decrease from last year's number (802). The automated list archive starting in December 2010 is accessible from http://infoserv.inist.fr/wwsympa.fcgi/arc/frbr.

Chris Oliver
Chair of the FRBR Review Group
August 1, 2014

Appendix C
Statements endorsed at meeting

1. Statement on $FRBR_{OO}$

The IFLA FRBR Review Group endorses the version 2.0[1] of the $FRBR_{OO}$ model (an object-oriented interpretation of the FRBR, FRAD and FRSAD models in the form of an extension of the CIDOC CRM model) as a valid ontology that can be used to express the semantic relationships embedded in descriptions provided by libraries (i.e., bibliographic and authority data) for the entities that make up the "bibliographic universe."

The ontology described in $FRBR_{OO}$ is based on IFLA's conceptualization of bibliographic and authority data such as expressed in the FRBR, FRAD and FRSAD entity-relationship models, although it also somewhat deviates from the original models on some points. The differences between $FRBR_{OO}$ version 2.0 and the FRBR, FRAD and FRSAD models are not sufficient for $FRBR_{OO}$ version 2.0 to be regarded as a distinct model that IFLA (and more particularly, the IFLA Cataloguing Section) would not endorse and recommend, but any possible users of $FRBR_{OO}$ version 2.0 should be made aware of them, so that their choices might be fully informed. These differences include, but are not limited to, the following:

- The Work entity, which has become, in $FRBR_{OO}$ v. 2.0, the F1 Work class, can be refined into the sum of concepts realized in one and only one Expression (F14 Individual Work), the sum of concepts shared by at least two Expressions (F15 Complex Work), the concept of enhancing existing Expressions by aggregating them or adding particular features to them (F16 Container Work), or the concept of capturing aspects of events by recording them (F21 Recording Work); some of these refined classes can in turn be refined by further subclasses. In particular, the F19 Publication Work conveys the notion that publishers' choices as to layout, paratext, cover art etc. are in themselves a sum of concepts (therefore, a Work) that enhances the authorial Expression.
- The Expression entity (transformed into the F2 Expression class) can be refined into Expressions that convey the notion of a complete Work as a whole (F22 Self-Contained Expression), or Expressions that cannot be regarded as a whole (F23

[1] As of August 2014, version 2.0 of $FBRR_{OO}$ still has the status of a draft.

Expression Fragment). The overall content of a publication is modelled as a subclass of F22 Self-Contained Expression, the F24 Publication Expression class.

- The Manifestation entity was split into two distinct notions: Manifestations that are exemplified by more than one Item (F3 Manifestation Product Type), and Manifestations that are exemplified by only one Item, with which they can easily be confused (F4 Manifestation Singleton).
- The Manifestation entity is not regarded as relevant in the case of electronic publishing, as the physical characteristics of all exemplars of the publication cannot be entirely planned by publishers, who can only be held responsible for the overall content of the publication (F24 Publication Expression) and the procedure to follow in order to download that content, but not for the physical aspects that all carriers of the publication could be assumed to share.
- The Item entity is split into two distinct notions: physical exemplars of "traditional" publications (F5 Item), and physical carriers of downloaded electronic publications (F53 Material Copy).
- The physical process of manufacturing exemplars of a publication is disassociated from the publishing activity properly said.
- The notion of performance is more elaborated upon than in the original FRBR model.
- Events are introduced in order to account for the temporal aspects of the FRBR entities.
- The Person entity is regarded as covering real persons only, not personae (there was some discrepancy between FRBR and FRAD on that point).
- The notion of fictional characters is introduced through the F38 Character class.
- The process through which identifiers are assigned to entities is completely developed.
- The types of derivation relationships among Works are not listed in such a detailed manner as in the original FRBR model.
- The relationships between a Work and its structural parts, on the one hand, and between an aggregating Work (such as an anthology) and the Works it aggregates, on the other hand, are modelled as two distinct types of relationships.

2. Statement on $PRESS_{OO}$

$PRESS_{OO}$ is an object-oriented model, defined as an extension of the $FRBR_{OO}$ model, which strives to capture a conceptualization of bibliographic information relating to continuing resources that remains based on the high-level concepts of FRBR, but goes more into the details of the specificities of continuing resources. The intention of the developers of $PRESS_{OO}$ was to solve the issues raised by the application of the FRBR model to continuing resources, while retaining the key notions that characterize the FR family of models.

$PRESS_{OO}$ was developed in 2012-2014 by a working group consisting of representatives from the ISSN International Centre and the Bibliothèque nationale de France (BnF). In this process, some members from the BnF contributed expertise with the modelling techniques used to define $FRBR_{OO}$, while members of the ISSN International Centre and other members from the BnF contributed the relevant domain expertise in the description of continuing resources. Although the developers of $PRESS_{OO}$ are members of IFLA, they did not act as such when developing $PRESS_{OO}$, and they had no mandate whatsoever from IFLA to perform that task. As a consequence, $PRESS_{OO}$ cannot be regarded as an IFLA document.

The FRBR Review Group acknowledges that, although the *Final Report on Functional Requirements for Bibliographic Records* says, on p. 5, in its "Areas for Further Study" section, that "The identification and definition of attributes for various types of material could be extended through further review by experts and through user studies. In particular, the notion of 'seriality' (…) merit[s] further analysis," nothing has been done so far in order to cover that area within the framework of the development of the entity-relationship models that make up the FR family of models. $PRESS_{OO}$ fills this gap regarding the modelling of the notion of seriality.

Although some specific attributes are declared for the Expression and Manifestation entities for serials, it is difficult to say that continuing resources are fully modelled in FRBR. The example provided on p. 23 (*The Wall Street Journal* as a Work realized in two distinct Expressions, *The Wall Street Journal Eastern Edition* and *The Wall Street Journal Western Edition)* seems to indicate that local editions of serials are to be regarded as instances of the Expression entity: that view has been challenged by serials specialists[2]

[2] JONES, Ed. The FRBR Model As Applied to Continuing Resources*. Library Resources & Technical Services,* 2005, 49(4), 227-242. Available from:

and results in complications when implemented in practice. Arguably, any local, linguistic etc. edition of a serial is a Work in its own right.

The FRBR Review Group endorses $PRESS_{OO}$ as a valid ontology that can be used to express the semantic relationships embedded in descriptions provided by libraries (i.e., bibliographic and authority data) for continuing resources in a way that is fully compatible with $FRBR_{OO}$. At its meeting on 4 April 2014 in Den Haag, the CIDOC CRM Special Interest Group endorsed $PRESS_{OO}$ as a valid and technically compatible extension of CIDOC CRM and $FRBR_{OO}$.

Summary of differences between $PRESS_{OO}$ and the original FR models

It should be noted that, as an extension of $FRBR_{OO}$, $PRESS_{OO}$ deviates from the original FR models on some points. The differences between $PRESS_{OO}$ and the FRBR, FRAD and FRSAD models are not sufficient for $PRESS_{OO}$ to be regarded as an unrelated model that IFLA (and more particularly, the IFLA Cataloguing Section) would not endorse and recommend, but any possible users of $PRESS_{OO}$ should be made aware of them, so that their choices might be fully informed. In addition to the differences already existing between $FRBR_{OO}$ and the FR family of models in their entity-relationship definition, and which are listed in the FRBR Review Group's *Statement on $FRBR_{OO}$,* the points on which $PRESS_{OO}$ deviates from FRBR include, but are not limited to, the following:

- Any serial, whether it is an "autonomous" publication or the local, linguistic etc. edition of a "larger" serial, is regarded as an instance of F18 Serial Work, i.e., as a Work in its own right.
- Any individual volume of a continuing resource is regarded as an instance of F19 Publication Work, i.e., also as a Work in its own right (although not an authorial Work, according to the distinction introduced by $FRBR_{OO}$ between authorial Works and publishers' Works).
- As Expressions and Manifestations of continuing resources that are still being published are not complete and do not represent the complete Work, they are not really taken into account, and the modelling effort focuses instead on the description of the predictability of behaviour of continuing resources rather than

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http://www.ala.org/alcts/sites/ala.org.alcts/files/content/resources/lrts/archive/49n4.pdf [Accessed: 20th June 2014].

SHADLE, Steve. FRBR and serials: an overview and analysis. *The Serials Librarian,* 2006, 50(1-2), 83-103. Available from: http://dx.doi.org/10.1300/J123v50n01_09 [Accessed: 20th June 2014].

TARANGO, Adolfo R. *FRBR for Serials: Rounding the Square to Fit the Peg.* Presentation, ALA Annual Conference (June 2008), UC San Diego (June 2008), and CONSER Operations Meeting (May 2008).

on the complete WEMI structure from the FRBR Group 1 entities. For instance, a distinction is introduced between language as an element foreseen in the issuing policy of a continuing resource, and the language actually found in the Expression of that continuing resource once all volumes thereof have been published, and which may happen to be a different language than the one that was foreseen in its issuing policy. Similarly, dimensions of carrier are no longer seen as an attribute of the Manifestation entity, but as an element of the issuing policy of the continuing resource as a Work—an element which has the potential to change over time.

- The predictability of behaviour of continuing resources is modelled through decomposing the overall issuing policy of a continuing resource into multiple individual aspects of that overall issuing policy, which the model labels “issuing rules.” As a consequence, much of the description of continuing resources is transferred to the Z12 Issuing Rule class, rather than directly associated with the F18 Serial Work class, as any individual issuing rule of a given continuing resource can be modified over time, without any loss of identity of that continuing resource.
- Events are introduced in order to account for such characteristic notions of continuing resources as: continuations, splits, mergers, absorptions, etc.
- The notion of storage unit is introduced as a distinct notion from Item: two Items bound together or united in any other manner that transforms them into a single physical object are regarded as forming an instance of the Z9 Storage Unit class (without losing their own characterization as Items).
- The notion of responsibility of a given ISSN centre over the metadata associated with a given ISSN is introduced in order to meet the specific needs of the ISSN International Centre, but is not expected to be implemented by any other possible users of the model.

To: Joint Steering Committee for Development of RDA
From: Gordon Dunsire, Chair, JSC
Subject: Protocol between the JSC and the FRBR Review Group

Related documents:
6JSC/Chair/xx/Shared documents Documents shared between the JSC and the FRBR Review Group

Background
"A key element in the design of RDA is its alignment with the conceptual models for bibliographic and authority data developed by the International Federation of Library Associations and Institutions (IFLA):

Functional Requirements for Bibliographic Records (FRBR)
Functional Requirements for Authority Data (FRAD).

The FRBR and FRAD models provide RDA with an underlying framework that has the scope needed to support:

a) comprehensive coverage of all types of content and media
b) the flexibility and extensibility needed to accommodate newly emerging resource characteristics
c) the adaptability needed for the data produced to function within a wide range of technological environments." *RDA 0.3 Conceptual Models Underlying RDA*

The third of the Functional Requirements (FR) models is Functional Requirements for Subject Authority Data (FRSAD).
RDA uses the FRBR and FRAD entities ***Work***, ***Expression***, ***Manifestation***, ***Item***, ***Person***, ***Family***, and ***Corporate Body***.
The JSC has published RDF classes corresponding to these entities, along with RDF properties for associated RDA attributes and relationships.[3] The methodology used to create previous, unpublished RDF element sets for RDA was the basis of the methodology used to create the FRBRer (entity-relationship), FRAD, and FRSAD element sets.[4]
The JSC Places Working Group is reviewing the treatment of the ***Place*** entity in RDA.[5]
The JSC Technical Working Group is coordinating the treatment of subject relationship designators in RDA.
The JSC has decided to wait until the planned consolidation of the FR models is complete before adding further entities to RDA, or mapping the RDA element sets to the FR element sets.

[3] RDA registry: http://rdaregistry.info/
[4] The FRBR vocabularies: http://iflastandards.info/ns/fr/
[5] Terms of reference for the JSC Places Working Group: http://www.rda-jsc.org/docs/6JSC-Chair-12.pdf

Documents

A list of background and shared harmonization documents is given in *6JSC/Chair/XX/Shared documents*.

The membership structure of the JSC does not accommodate direct representation of groups outside the JSC constituencies. The Chair or another member of the JSC acts as a proxy for communication between the JSC and such groups.

The JSC has a nominated liaison representative on the FRBR Review Group.

Purpose

The purpose of this protocol is to support the maintenance and development of semantic interoperability between RDA instructions, elements, and data models, and FRBR, FRAD, FRSAD and related models.

Methodology

The protocol is intended to be light-weight to avoid significant changes to the current practices, priorities, and workflows of the JSC and the FRBR Review Group.

The protocol is supported by the use of shared documents containing alignments and mappings between components of RDA and the FR family of models. The JSC develops such documents during an annual cycle for agreeing to significant amendments of RDA, while the FRBR Review Group is undertaking consolidation of the FR models over a period of several years. The JSC and FRBR Review Group are responsible for maintaining their versions of the shared documentation.

The usual channel of communication between the two groups is the JSC [consulting] liaison to the FRBR Review Group, who is responsible for routine communication, transmitting proposals and reports, reviewing each group's activity for potential issues, and monitoring changes to the shared documentation.

The Chair of the JSC Chair will act in place of the JSC liaison if there is a gap in representation, and in other appropriate circumstances.

Duties of the JSC

The JSC will:

- Nominate a [consulting] liaison to the FRBR Review Group.
- Consider proposals for developing RDA to improve the semantic interoperability of RDA and the FR models at its annual meeting and according to its policy and procedures.
- Inform the FRBR Review Group of potential or impending changes to RDA which may impact on shared and FRBR documentation.
- Publish shared documents submitted as proposals or discussion papers to the JSC, according to the JSC's policy and procedures.
- Minimise the delay in publishing new versions of shared documents to maintain synchronization with versions published by the FRBR Review Group.

Duties of the FRBR Review Group

The FRBR Review Group will:

- Consider proposals for developing the FR models to improve their semantic interoperability with RDA during the review period for the FR models.
- Inform the JSC of potential or impending changes to the FR family of models that may impact on shared and RDA documentation.
- Publish shared documents submitted as proposals or discussion papers to the JSC, according to the FRBR Review Group's policy and procedures.
- Minimise the delay in publishing new versions of shared documents to maintain synchronization with versions published by the JSC.

To: Joint Steering Committee for Development of RDA
From: Gordon Dunsire, Chair, JSC
Subject: Documents shared between the JSC and the FRBR Review Group

Related documents:

6JSC/Chair/XX Protocol between the JSC and the FRBR Review Group

Background and shared harmonization documents

The documents in this list support the Protocol between the JSC and the FRBR Review Group, published as *6JSC/Chair/XX*.

They relate to the background of collaboration between the Joint Steering Committee for Development of RDA (JSC) and the FRBR Review Group (FRBR RG) and the harmonization of *RDA: Resource Description and Access* and the Functional Requirements models (FRBR, FRAD, FRSAD).

Shared documents

Title	FRBR RG version	JSC version

Background documents

Title	FRBR RG version	JSC version
RDA to FRBR mapping		http://www.rda-jsc.org/docs/5rda-rdafrbrmappingrev3.pdf
RDA to FRAD mapping		http://www.rda-jsc.org/docs/5rda-rdafrbrmappingrev3.pdf
FRBR to RDA		http://www.rda-jsc.org/docs/5rda-frbrrdamappingrev.pdf

mapping		
FRAD to RDA mapping		http://www.rda-jsc.org/docs/5rda-fradrdamappingrev.pdf
RDA Core elements and FRBR user tasks		http://www.rda-jsc.org/docs/5chair15.pdf
RDA, FRBR/FRAD, and Implementation Scenarios		http://www.rda-jsc.org/docs/5editor4.pdf