

EPICo Shared Print Actions (SPA) Guidelines

Recommendations for use of the MARC 21 583 field and Guidelines for Implementation

Provided by the EPICo Metadata SIG and approved by the EPICo Core Group, October 2025.

Retention information in the catalog is used to determine whether materials are retained in the long term, and to inform shared print and collection management decisions at the local institutions. It is also a way to share retention information and to facilitate comparisons across Shared Print Programs.

1. Purpose

The purpose of this document is to support EPICo members in standardising the use of the 583 MARC 21 field for shared print retention commitments and to facilitate implementation. The recommendation is based on the Shared Print Actions (SPA) terminology promoting consistency across institutions and enabling effective data aggregation and reporting. (See the [complete terminology](#)).

The focus of the EPICo collaboration is the action term "committed to retain" as it is the most important piece of information to share between Programs. Other action terms can be added by Programs according to the SPA terminology.

2. Recommendations for use

The following subfields are mandatory for EPICo Programs:

- **The first indicator** shall be set as 1= not private
 - This means the data is possible to share between systems
- **Action Term (\$a):** "committed to retain"
 - Or similar translated phrase in another language (see information on translations below)
- **Action Code (\$b):** "aa"
 - Action code "aa" should be used to facilitate exchange independent of the language in \$a
- **Start Date of Retention (\$c):**
 - Use four-digit year (e.g., 2025) for the year of the commitment
- **End Date of Retention (\$d):**
 - Use the word "permanent" to indicate indefinite commitment (or similar translated word)
 - If it necessary for the project to indicate a specific end date for the retention, use a four-digit year, YYYY, (e.g., 2025) or YYYYMMDD (e.g. 2045-12-31)
- **Program Code (\$f):**
 - EPICo members should use unique name or abbreviations for their program
- **Institution (\$5)**

- The institutional code for the library that holds the title: ISIL code, ISIL number, LC organization code or national code
- Recommended subfield (if applicable)
- **Link to Program Documentation (\$u)**
 - A stable, public URL to documentation for the Shared Print Program
- **Source of Term (\$2): "spa"**
 - Must be present to indicate the use of the SPA vocabulary.
 - If translations are used, the new “source of term” for that language should be used, e.g. **spanor** or **spager**

Examples

583 1 \$a committed to retain \$b aa \$c 2025 \$d 2075 \$f UKPBC
\$u <https://ukpbc.uk/sharedprint> \$2 spa

583 1 \$a langtidslagret \$b aa \$c 2022 \$d permanent \$f BOTT \$5 Oslo
\$u <https://bott.no/sharedprint> \$2 spanor

3. Guidelines for implementation

a) Placement of the 583 information in a Catalog Record

Retention information can be recorded in different levels in the record, depending on the needs of the Program and/or the systems requirements. If necessary, multiple levels can be used.

- Bibliographic level
- Holdings level
- Item level

It is important from an EPICo perspective that the information can be exported for aggregation and comparison, regardless of the placing in the local catalog. Metadata should be exported in the MARC format.

b) Translations

- The original SPA terminology (in English) can be used for terms in \$a and \$d.
- Translations to other languages must be verified by the Library of Congress.

4. Ongoing Governance

- EPICo Metadata SIG will review the guidelines annually and update them if needed.
- Member feedback is welcomed to refine best practices and ensure interoperability