
From Accidental Technologist to Accidental Traveler, or What I Learned from a Month in Shanghai

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In May 2008 I spent a month working at the Shanghai Library as part of a work exchange. A month is a long time to be gone from work and home, but a short time to become acquainted with a library as large as the Shanghai Library. In this column I will share a few of my thoughts on my experience. Some of my observations are about technology, some on other aspects of the library, and some are more cultural reflection. I hope that you will enjoy this diversion from the regular Accidental Technologist topics.

OVERVIEW OF SHANGHAI AND THE SHANGHAI LIBRARY

Shanghai is located in the center of the Pacific Chinese coast. It is a major trade and financial center with a population of more than 13 million people. Construction is rampant, with the entire area east of the Huangpu river (Pudong) new since 1993. The Shanghai Library and Institute of Scientific and Technological Information of Shanghai is one of the ten largest libraries in the world and the second largest library in China. It houses more than 50 million items and serves 9 million users a year. In likening it to a U.S. library, it seems close to the New York Public Research Libraries, except with a circulating collection. The 1996 merger with the Institute of Scientific and Technological Information of Shanghai brought scientific and industry research assistance into the purview of the Shanghai Library.

Within the Shanghai Central Libraries network are fifty-four district and community public libraries. While the district and community libraries are public, they are administratively separate from the main Shanghai Library, with separate funding and governance. The network started in 2000 and aims to increase cooperation and provide a “one-card-through” service to library patrons that can be used at all of the Shanghai public libraries.

My time at the Shanghai Library was divided between several departments. My first two weeks were primarily with the Friendship Library in the foreign documents division, where I offered English-language reference assistance and learned about the library. (I also spent some time adjusting to the time zone and figuring out living on my own in a large city where I spoke none of the language. The head librarian in that unit was very helpful.) Next I spent about a week with the interlibrary lending, document delivery, and document supply center. The last week contained some time with acquisitions and cataloging, tours of two branch libraries, and the digitization and preservation units, and presenting a lecture on my final day. Somewhere in the twenty-five days I

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Leave It Behind

Wires are so 1999. Why tie yourself to one location? Getting rid of the reference desk is one way to break the tie to a fixed space, but less dramatic changes can be liberating as well. Cameron Help at the Science and Technology department of the University of Alberta dispatches in-person assistance to students in the library who do not want to leave their workstation. The patron can choose to be immobile (why give up a computer or a seat?) but the librarian is mobile.

Pick It Up

Frederick County Public Libraries uses “ultra light mobile PCs and wireless communication badges to access library resources, ask other staff for assistance, and answer questions for patrons.” Now that’s roving reference (www.popgoesthelibrary.com/2008/08/working-on-my-feet.html).

visited Nanjing and Suzhou, spent three days buying books, learned to use the subway, and spent hours walking miles through the city.

Shanghai is a very safe city. I’ve heard that most of China is this way, but I felt like I was in a particularly safe place. My lodging was at a hotel immediately behind the library, and there were guards by the hotel and by the library. It was also a block from the U.S. Embassy, which had Chinese Army guards stationed outside. Shanghai was also easy to navigate, since the street signs are in both Chinese characters and the Romanized Pinyin. The subway stops are labeled in Mandarin and English. The total of my knowledge of Mandarin consists of “hello,” “thank you,” and “good,” but people under about twenty-five years of age have been required to study a second language starting at age 10, and most choose English.

BUILDING THE NEW, CELEBRATING THE OLD

I traveled to three cities while in China. In all three places I saw significant new cultural institutions. Nanjing and Shanghai both have magnificent new libraries, and Suzhou has a museum designed by renowned architect I. M. Pei. There are numerous other new cultural institutions in Shanghai as well. The historical, cultural, and economical antecedents to this recent proliferation of cultural institutions are complex. As a casual traveler, however, my impression was of a city (indeed a nation) exerting its identity and pride.

Embodied in the buildings of the Shanghai and Nanjing libraries were the themes of history and modernity. Modernity was often mentioned by the staff of the library. It was also echoed by my guide in Nanjing when she showed me

her city’s library. Modernity was something that the librarians wanted to bring to my attention, but would have been evident without comment. The automated book-delivery trolley in Shanghai, the array of computers in the lobby in Nanjing, and the very architecture of both buildings impress the visitor as state-of-the-art upon sight.

At the same time, history is highlighted in both buildings as well. The Nanjing Library is built over part of the old city road, and through a glass floor in the basement one can see and walk over the tracks left hundreds of years ago by wagons. The Shanghai Library has a room devoted to genealogies, with several ancient volumes on permanent display. Next to that is a room where the public can view the restoration process for ancient documents. The Shanghai Library also has an interior courtyard evoking traditional Chinese gardens.

This “forward to the future” mentality is also present in the Expo Reading Room. Shanghai will host the 2010 World Expo. There is a reading room that houses a historical collection of World’s Fair and Expo books, maps, brochures, and memorabilia as well as contemporary publications to help Expo planners and researchers. The Expo is very big in Shanghai and tied to city pride with the motto of “Better City, Better Life.” The library is part of this planning and one of the buildings being built for the Expo will eventually be a district public library.

FOR-FEE SERVICES

The Shanghai Library has a staggering array of services available, many targeted to business and industry. Most of these I did not witness first-hand. With only a month in Shanghai and less than twenty days in the library, there was a lot that I did not see. I did participate in one of the library’s research services—housed in the document delivery department—which provided in-depth research, particularly for more science-focused industry. As I currently work at an academic library where the model is to provide instruction in the use of resources, the opportunity to sink myself into a market analysis was a trip back in time to when I worked for a management consulting firm.

Other for-fee services are as far-ranging as document translation, book restoration, rare book valuation, and current-events clipping services. There is a list of services on the left-hand menu of the services page of the English-language version of the Shanghai Library website (www.library.sh.cn/english/guide/Services). Some of these services, such as the online reference service, are free. Others carry a fee, although fees are not listed on the English version of the website.

For-fee service is a fraught issue in the United States and has been the cause of debate among librarians. There are the ethical questions of what we can charge for as publicly funded institutions and if it is counter to the concept of free access to information. We may have fewer qualms when it comes to chargeback for in-depth research for business, but then we find ourselves in a legal environment where we must pay

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close attention to our database licensing agreements.

The Shanghai Library is very entrepreneurial, using the wide array of librarian expertise to offer services for businesses and individuals with needs outside of reading and basic research. Certainly there is a different service philosophy, as well as a different legal environment, that underlies this service model. Even at the level of library cards and readers' access there is a stratified system with four levels of fees.

The most basic of reader cards is free and allows access to reading materials within most of the reading rooms in the Shanghai Library. The next level of card requires a refundable deposit and allows patrons to borrow materials from most of the circulating collections at the Shanghai Library and from the other public and community libraries in the city. The deposit cost of 100 RMB (15 USD) seems low, but is about the same as an average day's pay.¹ A more extended reading-only card has no deposit—and no circulation privileges—but offers access to all of the reading rooms in the Shanghai Library for a yearly fee of 25 RMB. The most expensive card has a yearly fee of 50 RMB and a deposit of 1000 RMB and allows checkout of materials from the foreign documents areas and the closed-stacks books.

This system of free-to-read but fee-for-loan is not unique to the Shanghai Library; the Nanjing Library has a similar fee structure. The deposits to obtain lending cards are obviously to cover in case materials are not returned. A higher cost for the closed stacks and foreign materials represent a higher replacement cost for books published outside of China as well as for older, possibly out-of-print books. This requirement for deposit, rather than a post-facto fee for replacement, shows a different approach to access to information. Protection of the collection is the priority. There also must be a difference in people's willingness to pay for library services. The array of for-fee services (outside of library cards) would be unlikely to be maintained without a clientele. The 1995 merger of the Shanghai Library with the Institute of Scientific and Technological Information of Shanghai (ISTIS) supports the offering of research services for business and industry.

INFORMATION TECHNOLOGY IN THE LIBRARY

Since this is the Accidental Technologist column and not the Accidental Traveler column, you may expect some mention of the technology in use at the Shanghai Library. In many ways the technology is quite similar to that used in United States libraries and therefore not as interesting as some of the differences that I observed. The Shanghai Library has an OPAC (they call it the iPAC) and subscribes to a large number of online databases in English and in Mandarin. They do not have a link-resolver for connecting databases to e-journals, but they are considering it. I had a good conversation with the document supply center (which also does development of technology-supported services for the library) about federated searching. Here are the technology experiences that stand out the most:

Cooperative Online Reference Services (CORS)

The Shanghai Library has a well-established virtual reference service using chat and e-mail. It is staffed by more than twenty librarians in the Central Libraries network, and they have expanded to include librarians from other countries such as Singapore and the Queens Borough Public Library. My original plan had been to hold my lecture on virtual reference in U.S. libraries, but in light of the existing CORS, I changed my topic to the future of research libraries. More on that later.

Services for Cell Phones

Cell phones are big in China. The Shanghai Library has developed several services that use short message service (SMS) and micro-payments through the cell phone. The Document Supply Center developed and staffs an SMS reference service. They have also developed a way for patrons to use their cell phones to register for lectures and workshops at the library. Patrons can also use their mobile phones to pay for document delivery. Payment is arranged with China Mobile and the amount is deducted from the patron's pre-paid mobile card.

Digitization

The Shanghai Library has an active digitization program involved in scanning of ancient texts and manuscript materials. The size of the operation is impressive, but the most striking feature is that the digitized materials are viewable only from computers within the library. I discovered this on my second-to-last day and did not find an answer to why this is the case before I left. If you know the answer, let me know, otherwise I'll figure out who I need to e-mail there to uncover the philosophy behind circumscribing access to noncopyrighted digital content.

Information Complexity

Library patrons in any country miss the information sources that they seek. Even well-educated and focused scholars fail to find resources vital to their research. It is a challenge to make library websites easy to navigate and able to reveal information relevant to a wide variety of patrons. Large libraries like the Shanghai Library and the University of Illinois have an even more difficult time revealing their treasures. I am not sure if I find this encouraging or if it causes me despair. But it is a problem of complexity and organization and not unique to the United States.

Pattern Recognition

Structured information (such as MARC) makes using a library catalog easier. Even without knowing the language or being very familiar with the Horizon system, I could search using the Chinese iPAC and recognize parts of the bibliographic record. Even with access to an English-language

interface at my desk, this was useful when assisting patrons at the public terminals.

PEOPLE-POWERED

For all of its technology and modernity, China is very much people-powered. Watching the ubiquitous construction in Shanghai, I saw lifting done with people and pulleys. Even with 13 million people in Shanghai, I never saw a line except at the train station and the airport, and these moved quite quickly. Simply put, there are a lot of people to be served and a lot of people employed to serve them.

In the Shanghai Library there was no shortage of staff. There were always security guards near the entrance. The building was spotless, and almost daily I saw the banisters being polished. In my library, as well as many other U.S. libraries, we are concerned with reduction of service points. Part of the motivation is to decrease patron confusion by reducing the myriad options, but a lot of the drive is efficient use of staff. The Shanghai Library has a new building built with many service points; no matter where you are, you are close to a service desk. One reason for the array of service points is the physical layout of the library, which is organized into about thirty reading rooms, each requiring staff to oversee the patrons and collections as well as to answer questions and facilitate access.

In the foreign documents department and Friendship Library where I spent two weeks, the librarians' desks were out in public. All of their work was performed in front of patrons. If you needed the German-language specialist, she was always there at one end of the room except for when at lunch or at a meeting. The head of the department was also always present at the reference desk. There were not a lot of questions received at these two service points—my desk offered a third—but the librarians were not idle. The prevailing service philosophy in United States libraries is to separate time at the reference desk from as much other work as possible so that the librarians always look available. Actual practice in libraries varies. As libraries in the United States see in-person reference questions decline in numbers, some are closing reference desks. Maybe maintaining a presence but bringing “non-desk” work out to the public areas would serve the same staffing efficiency but keep librarian expertise available.

Abundance of staff was also notable in technical services as well. On a tour of the preservation and digitization areas I counted twenty-three staff actively engaged in scanning and processing to digitize library materials. An additional two staff members were making rubbing transfers of Chinese stone tablets, and another five were using traditional preservation techniques on fragile documents. I was unable to see the more high-tech preservation lab due to the chemicals in use.

Retrieval from the bookstacks of the library is quickly achieved with a mix of technology and staff. Staff on each of the nineteen stories of the closed stacks are notified electronically of materials requested by patrons. They then retrieve the items and the books are delivered to the desk via a telelift

book trolley system. Books arrive within twenty minutes of being requested from a collection of over 50 million volumes. I admit being fascinated by the telelift system and standing by the circulation desk to see this in action. Certainly this automation speeds the retrieval process, but having staff in place is key to this quick turnaround.

FORWARD TO THE FUTURE

On my last day in Shanghai, I presented a lecture for the Shanghai Library Association. About thirty-five librarians from academic libraries throughout the city attended. I spoke only briefly on virtual reference and focused instead on the future of research libraries. I had noticed that there was little talk about the future plans for the library: As mentioned above, the emphasis was on the ancient and on being up-to-date. Several librarians told me that I had chosen an interesting topic because the future is not something that librarians in China spend much time considering. This was interesting to me, since American libraries have a (generally healthy) preoccupation with strategic plans, visions, and goals.

Early in my stay in Shanghai a devastating earthquake hit Sichuan. The rescue mobilization and relief efforts were phenomenal. The people of Shanghai felt personally a part of the relief effort for an event a thousand miles away. I was moved by the scope of the tragedy but also by the solidarity of ordinary citizens. With 1.6 billion people, China as a united country is a force. When the people and the government direct their efforts—as with the earthquake relief and the Olympic preparation—the results are impressive. China's importance in world trade as an exporter is already established. With its growing economy, it is increasing its influence in other areas. U.S. vendors, including library vendors, see the potential in the China market. The question is whether China will become as big of a player in the knowledge economy as it is in the production economy.

Cities in China have committed considerable resources to their libraries. China has the potential to shape the products and services of libraries not just within their own borders, but globally. This will, however, require that libraries start to think about the future.²

References and Notes

1. Xinhua News Agency, “Average Salary Increase of Urban Workers Rises to Six-Year High,” Apr. 2, 2008, www.china.org.cn/government/central_government/2008-04/02/content_14111192.htm (accessed Aug. 15, 2008).
2. The conclusion for this column was particularly difficult, as a trip can be a difficult thing to distill. For less formal travel ramblings, see www.libraryun.com/shanghai. Photos are available at www.flickr.com/photos/15665541@N00/sets.