



上海图书馆  
SHANGHAI LIBRARY

上海科学技术情报研究所  
INSTITUTE OF SCIENTIFIC & TECHNICAL INFORMATION OF SHANGHAI

纪念CASHL服务启动20周年  
外文人文社科文献保障体系高质量发展研讨会  
(2024年4月25日, 复旦大学)

# 从“要文献找上图”到“在上图做研究” ——智慧时代图情知识服务探索与思考

上海图书馆（上海科学技术情报研究所）

上海市古籍保护中心

陈超

2024年4月25日

# 第1情报™

预警·竞争·战略

第三届全国馆际互借与文献传递研讨会（2011-11，昆明）  
馆际互借与文献传递的创新与发展

## 智慧时代的文献服务创新思考

上海图书馆上海科学技术情报研究所

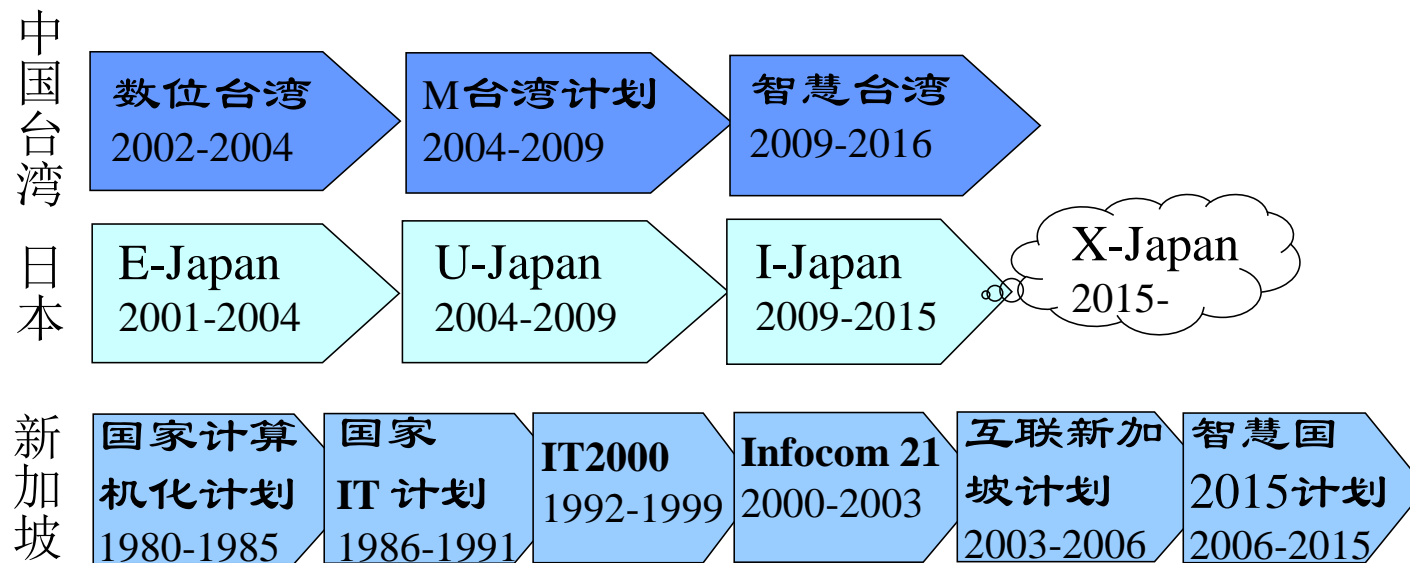
陈超

2011年11月16日

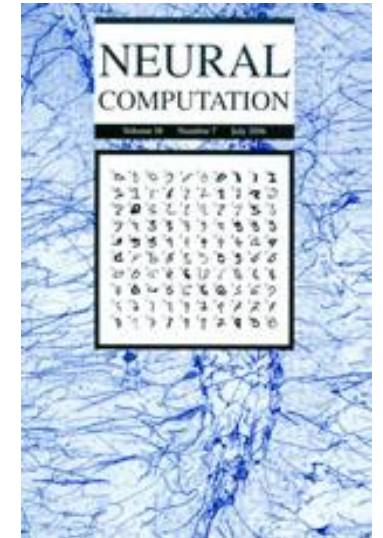
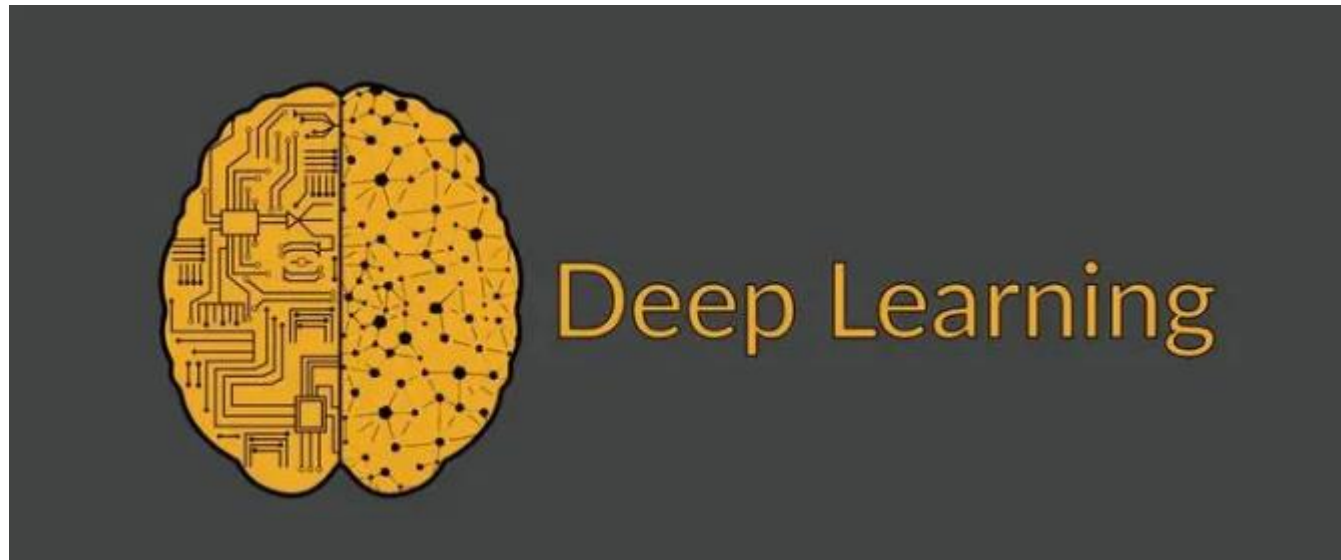
# 智慧时代的文献服务创新思考

第1情报™  
预警·竞争·战略

## 信息化进入智慧时代 ( Decade of Smart ) ?



信息化：电子化→数字化→网络化→智慧化



2006年，Hinton 发表了一篇论文《A Fast Learning Algorithm for Deep Belief Nets》，提出了降维和逐层预训练方法，该方法可成功运用于训练多层神经网络，使深度网络的实用化成为可能。该论文也被视作深度学习领域的经典之作。

# 图书馆如何顺应智慧时代





上海图书馆  
SHANGHAI LIBRARY  
上海科学技术情报研究所  
INSTITUTE OF SCIENTIFIC & TECHNICAL INFORMATION OF SHANGHAI

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回望：CASHL与SHL



前瞻：现状与趋势



探索：转型与超越

# 回望：CASHL与SHL

01



2012年5月3日，在美丽的杭州，CASHL 与上海图书馆签署战略合作协议。





# 我们共同走过的2012-2024



### CASHL原书外借

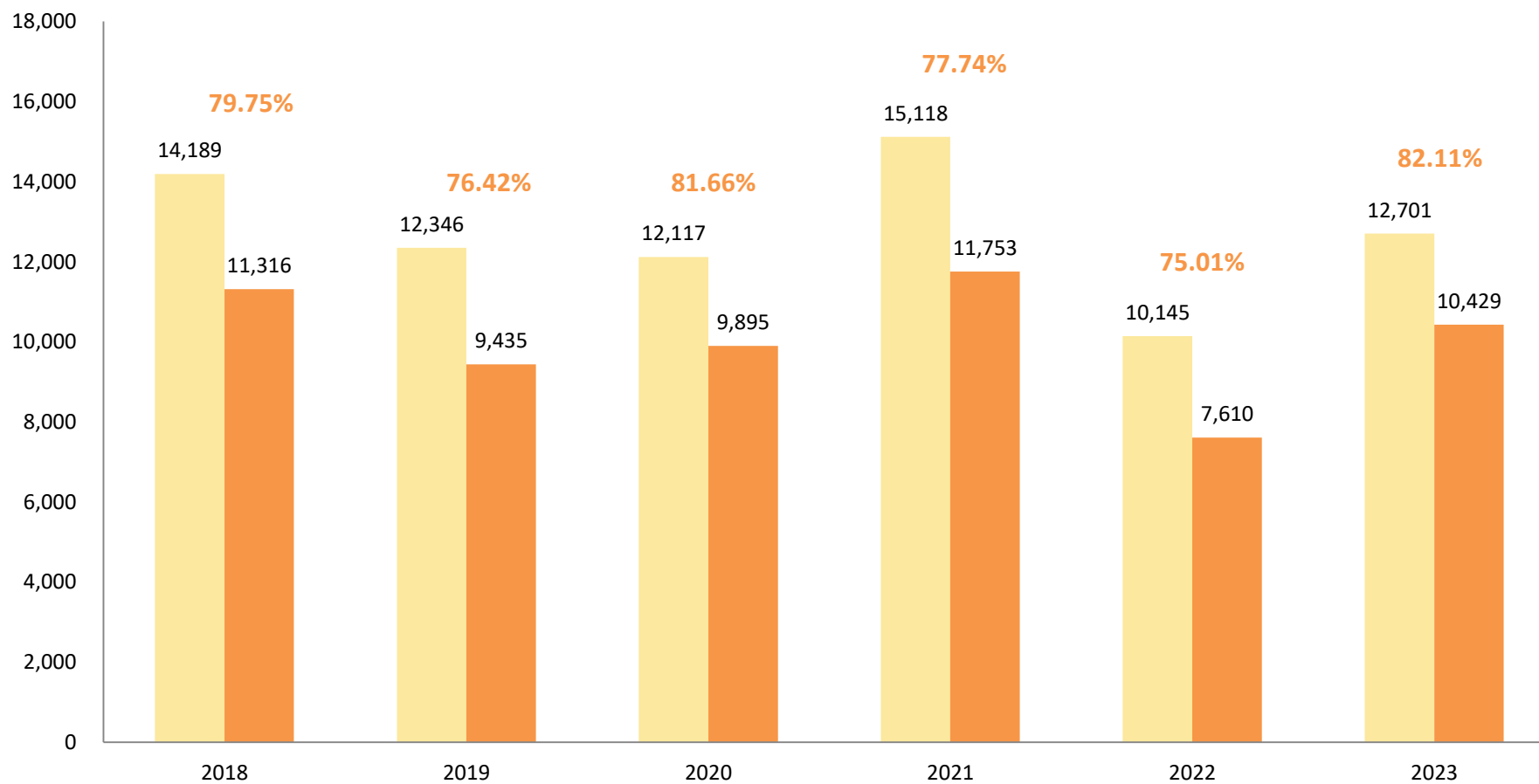


## CASHL文献传递

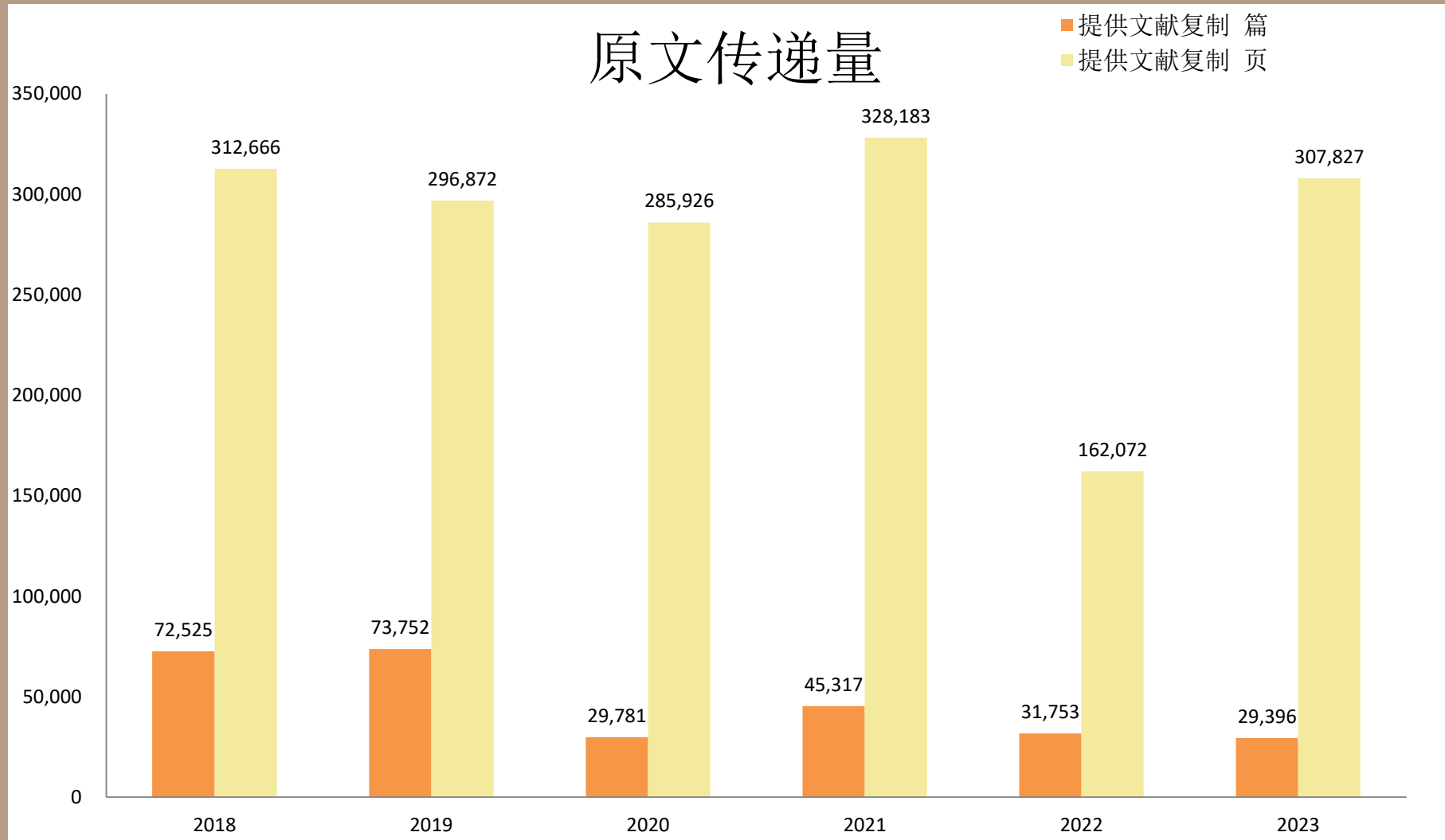


## 馆际互借量

请求数 件    满足数 件

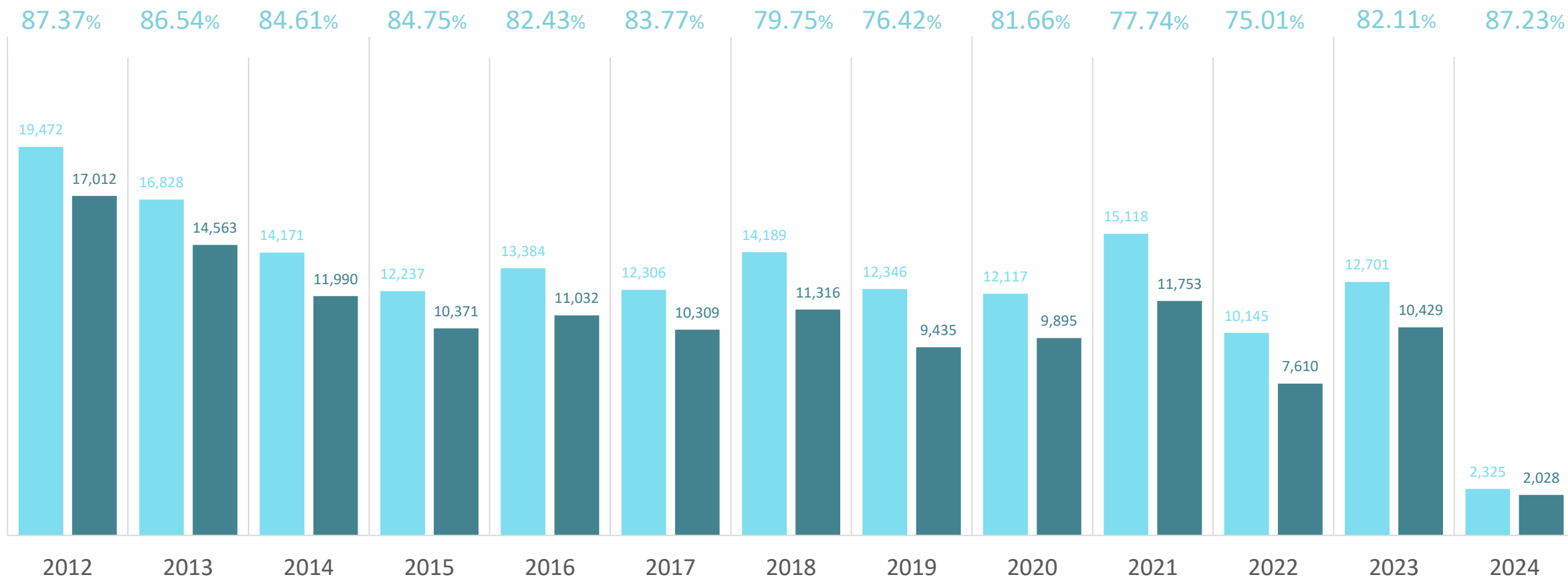


# 01

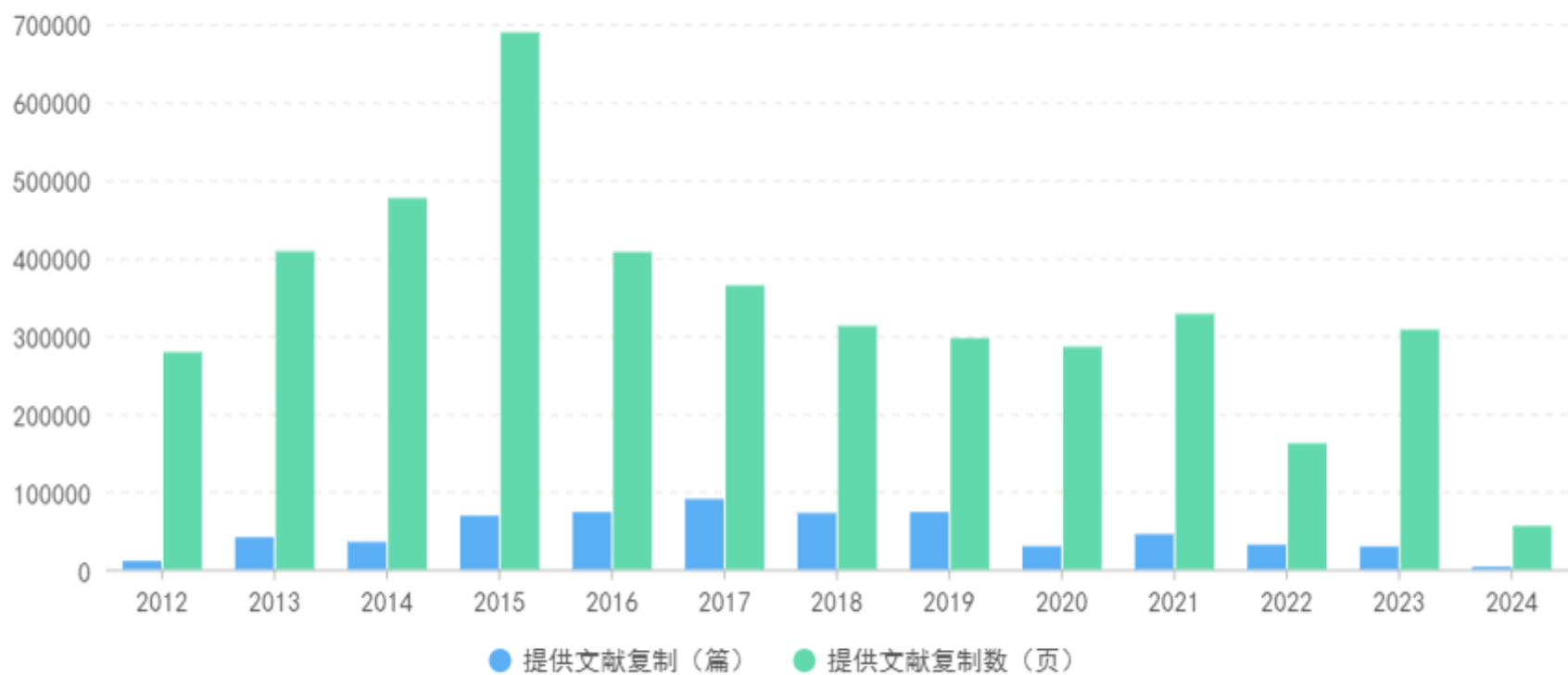


### 2012-2024年馆际互借情况

■ 请求数 ■ 满足数



2012-2024文献传递情况



# 前瞻：现状与趋势

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# 02





**Resource sharing:** A term covering a variety of organisations and activities engaged in jointly by a group of libraries for the purposes of improving services and/or cutting costs. Resource sharing may be established by informal or formal agreement or by contract and may operate locally, regionally, nationally, or internationally. The resources shared may be collections, bibliographic data, personnel, planning activities, etc. Formal organisations for resource sharing may be called bibliographic utilities, cooperative systems, consortia, networks, bibliographic service

Library consortium: A formal association of libraries, usually restricted to a geographical area, set number of libraries, type of library, or subject interest, that is established to develop and implement resource sharing among the members and thereby improve the services and resources available to their respective target groups.



**MOBIUS Consortium**

## A Valuable Partnership

**MOBIUS is a vibrant, collaborative partnership of libraries providing access to shared information resources, services, and expertise.**

### Resources

Tap into the larger buying power of the Consortium and keep up-to-date on new technologies and services:

- A common Integrated Library Services platform enables efficiencies ranging from eliminating cataloging overlaps to optimizing resource discovery, as well as shared system costs, resulting in major operational savings.
- Shared technical infrastructure for the Integrated Library System eliminates the need to manage a server.
- Supplement local collections with access to a user-initiated resource sharing system of over 60 million items from academic, special, and public libraries in Missouri, Colorado, Iowa, Texas, and Oklahoma at a cost of about \$1.00 per item.
- A courier system provides access to over a thousand libraries in the Midwest at a cost of about \$0.83 per item, with delivery in 3 to 4 days.
- Cost-effective shared e-book collections available only to consortium members.

### Services & Expertise

Personalized, professional support:

- MOBIUS staff provide on-site training, tailored to the needs of each library, on demand and at no extra cost. Library vendors can charge thousands of dollars for such services.
- Expert, personal service from the MOBIUS Help Desk saves member library staff time and provides a level of service above and beyond a library vendor.
- Help Desk staff manage data loads, product implementations, and general system functions so that member library staff are free to provide more services to users.
- Discounts are available to members on Electronic Resources, saving money through shared contracts - all provided by an expert who manages, advocates, and negotiates contracts and discounts on behalf of the membership.

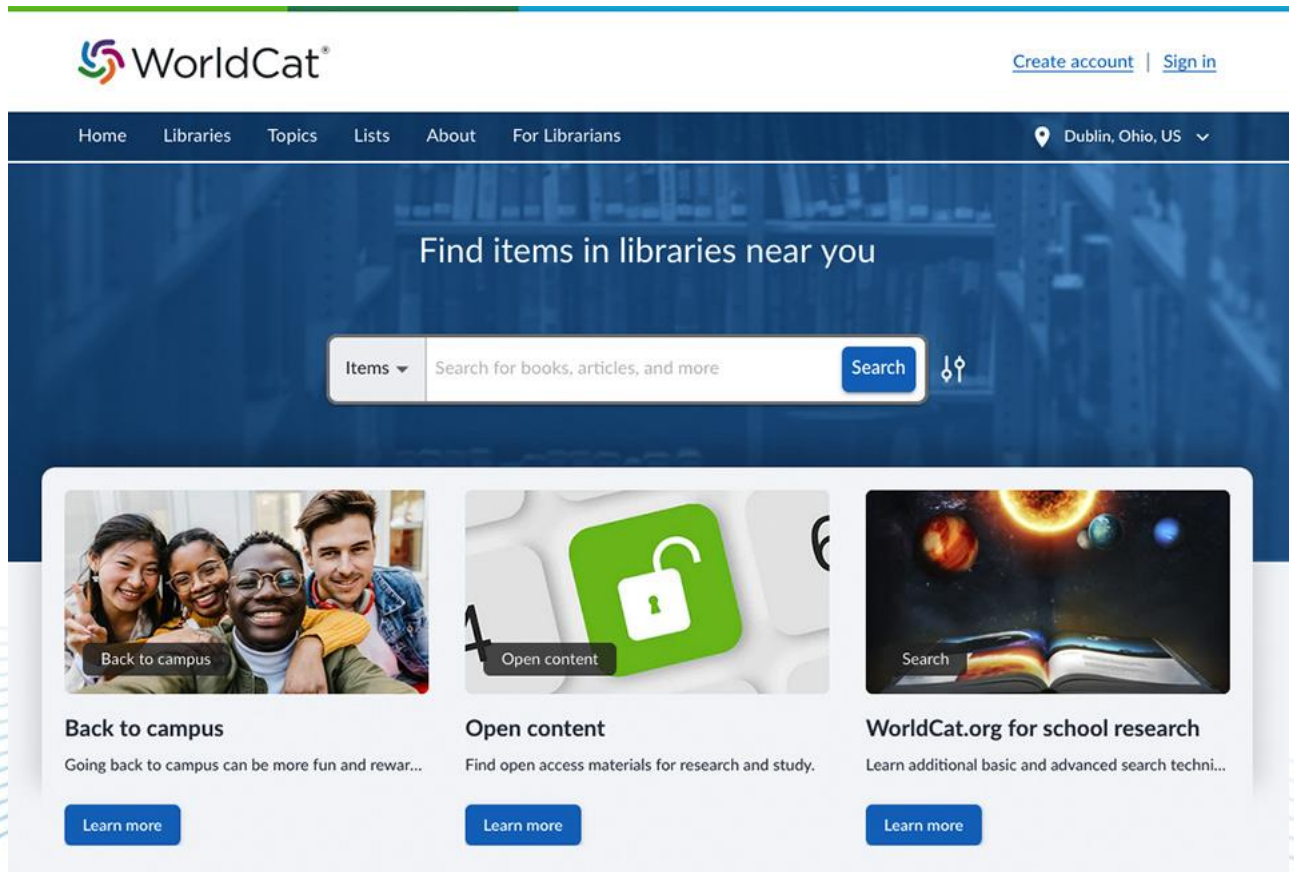
### Collaboration

Sharing knowledge and working together to get more done - creating a true cost-saving collaborative environment equalizing service for all:

- Collaborative opportunities at all levels is provided through discussion lists, committees, task forces, and the annual conference. The consortial environment fills a major skill and capacity gap beyond the reach of individual libraries, as large institutions provide expertise and assistance to smaller ones.
- The MOBIUS Annual Conference, which features national keynote speakers, is **free** to all member library staff, providing a venue where library staff can present, share expertise, and gain valuable professional development.

**MOBIUS Headquarters**  
111 E Broadway Ste 220 Columbia, MO 65203  
mobiusconsortium.org  
Voice: 877-366-2487 Fax: 541-264-7006






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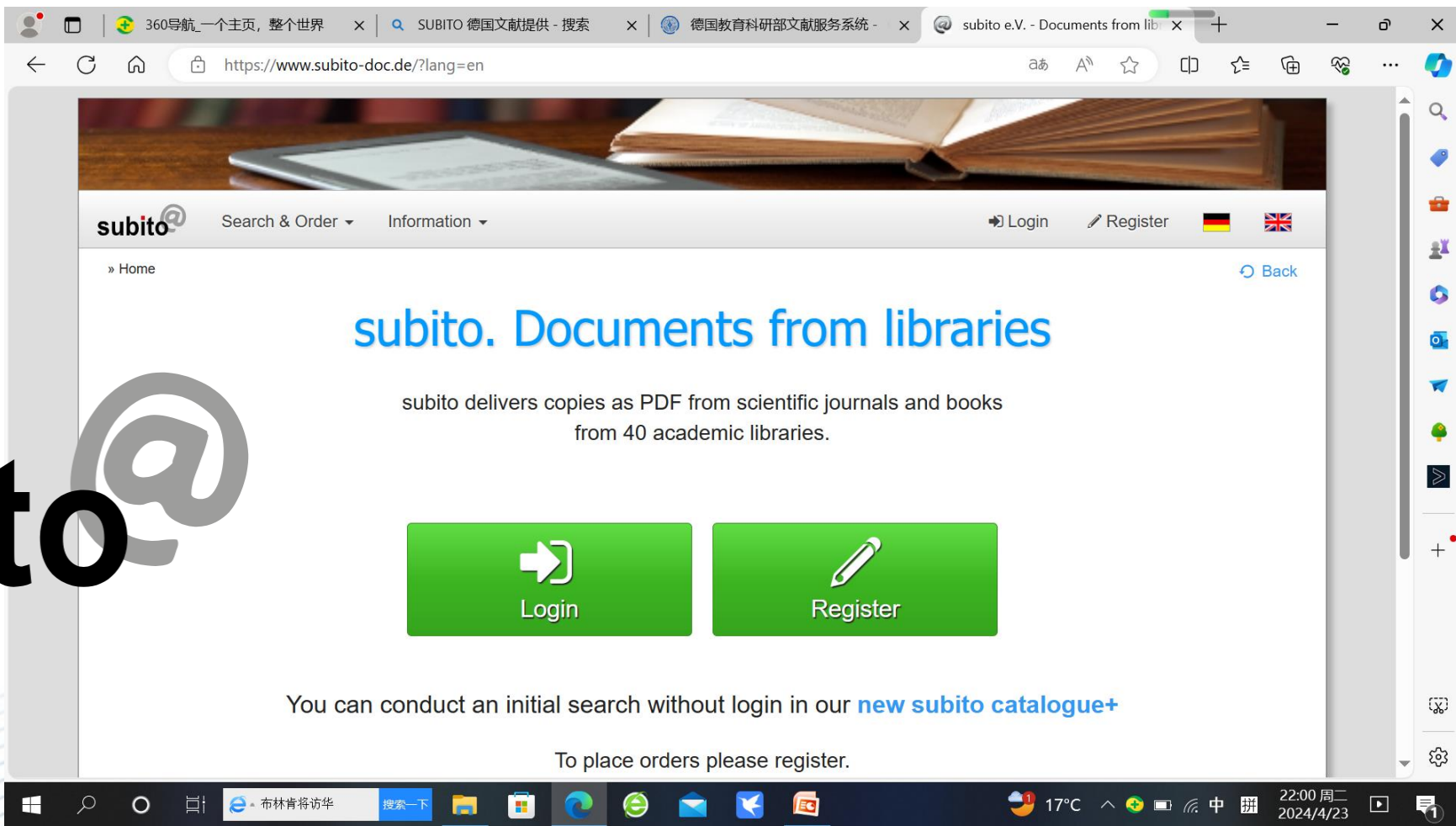
Tipasa®

Powered by WorldShare®



Simplify the complexities of resource sharing.

Tipasa allows you to manage a high volume of interlibrary loan requests, automate routine borrowing and lending functions, integrate with third-party systems, and provide an enhanced patron experience. You can meet users' needs without requiring heavy IT support, server management, or extensive configuration and training.



subito@

subito@  
Documents from libraries

# 大英图书馆的文献提供服务


## Liquidity risk

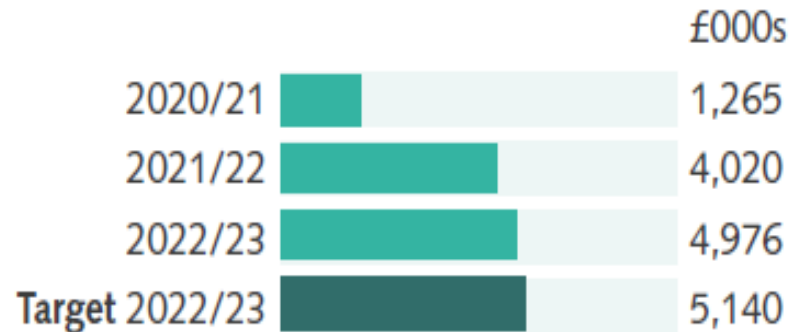
Approximately 79% (2021/22: 78%) of the Library's income is provided by Grant in Aid from the Department for Culture, Media and Sport which is drawn down according to need. The remaining income is self-generated and is volatile. Remote Document Supply is still the major source of self-generated income. As the majority of the Library's cash requirements are met through Grant in Aid, financial instruments have less potential for creating risk than would be the case for a non-public-sector body of similar size.

The Library holds highly liquid assets amounting to £68m at 31 March 2023 (2021/22: £64m) which are comprised of cash at bank and in hand and short term deposits. The Library regularly monitors the deposit portfolio to manage exposure to liquidity risk.

# 大英图书馆的文献提供服务

## FINANCIAL AND ECONOMIC


**Commercial margin<sup>1</sup>.** Includes gross margin (income less direct costs) of commercial activities such as ticket sales, licensing, document supply and space rental.



Commercial margin performance is 4% below the original target agreed at the beginning of the year.

# 大英图书馆的文献提供服务

## 4. INCOME FROM CHARITABLE ACTIVITIES

	2022/23 £000	2021/22 £000
Custodianship	144	84
Research	3,342	3,378
Business	888	584
Culture	7,403	3,643
Learning	44	52
International	–	45
Enabling activities	1,917	1,967
	13,738	9,753

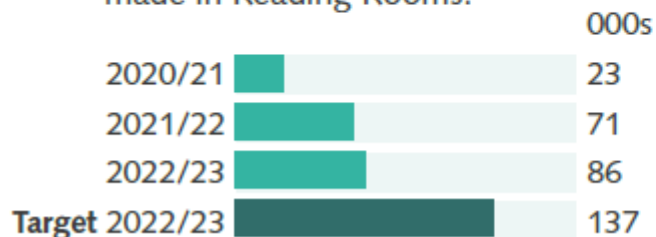
Income from Charitable Activities includes Document Supply and other information services, sponsorship income, licensing and royalties, publication sales, exhibition entrance fees, retail income, income for performing Public Lending Right facilities for the Irish Government and income from performance related grants.

House of Commons	Dr Simon Thurley, a member of the British Library Board, is Chair of the House of Commons Conservation Panel	Document Supply transactions	1	-	-	-
House of Lords	Lord Janvrin, Deputy Chair of the British Library Board, is a member of the related party and Baroness Fraser, a member of the British Library Board, is a member of the related party and its Communications and Digital Select Committee	Document Supply transactions	1	-	-	-
Institute of Historical Research London	Dr Simon Thurley, a member of the British Library Board, is a Senior Research Fellow of the related party	Document Supply transactions	2	-	-	-
London School of Economics and Political Science	Mr Nicholas Deyes, Independent Member of the Audit Committee, provided consultancy services to the related party	Consultancy services	4	-	-	-
National Lottery Heritage Fund	Dr Simon Thurley, a member of the British Library Board, is the Chair of the related party	Grant income	1,305	-	-	-
National Portrait Gallery	Lord Janvrin, a member of the British Library Board, is a Trustee of the related party.	Royalties	2	-	-	-
Society of Authors	Ms Tracy Chevalier, a member of the British Library Board, is member of the Advisory Council of the related party	Royalty payments	16	-	5	-
Society of College, National and University Libraries	Ms Liz Jolly, Chief Librarian of the British Library, is a Trustee and Board member of the related party	Membership	-	23	-	-
Teesside University	Ms Liz Jolly, Chief Librarian of the British Library, is an honorary professor of the related party	Document Supply transactions	12	-	1	-
University of Bristol	Dr Jeremy Silver, a member of the British Library Board, is Chair of the Bristol Digital Futures Institute at the related party	Document Supply transactions and copyright fees	26	2	1	-
University of Cambridge	Dr Venkatraman Ramakrishnan, a member of the British Library Board, is emeritus fellow of the related party	Document Supply transactions	2	-	6	-
University of Huddersfield	Dr Delroy Beverley, a member of the British Library Board, is Council member of the related party	Document Supply transactions	4	-	-	-
University of Oxford	Lord Janvrin, a member of the British Library Board, is an honorary fellow at the related party.	Document Supply Transactions	263	2	2	-
University of Portsmouth	Ms Liz Jolly, Chief Librarian of the British Library, is a Governor and Board member of the related party	Document Supply Transactions	8	-	1	-



## RESEARCH *We support and stimulate research of all kinds*

**Number of reference and librarianship enquiries answered<sup>1</sup>.** Includes number of remote reference enquiries and enquiries made in Reading Rooms.



Both onsite and remote enquiries have been significantly below target. The onsite performance reflects the low visits to Reading Rooms during the year. A marketing campaign started in September 2022 to try and improve Reading Room visitor numbers.

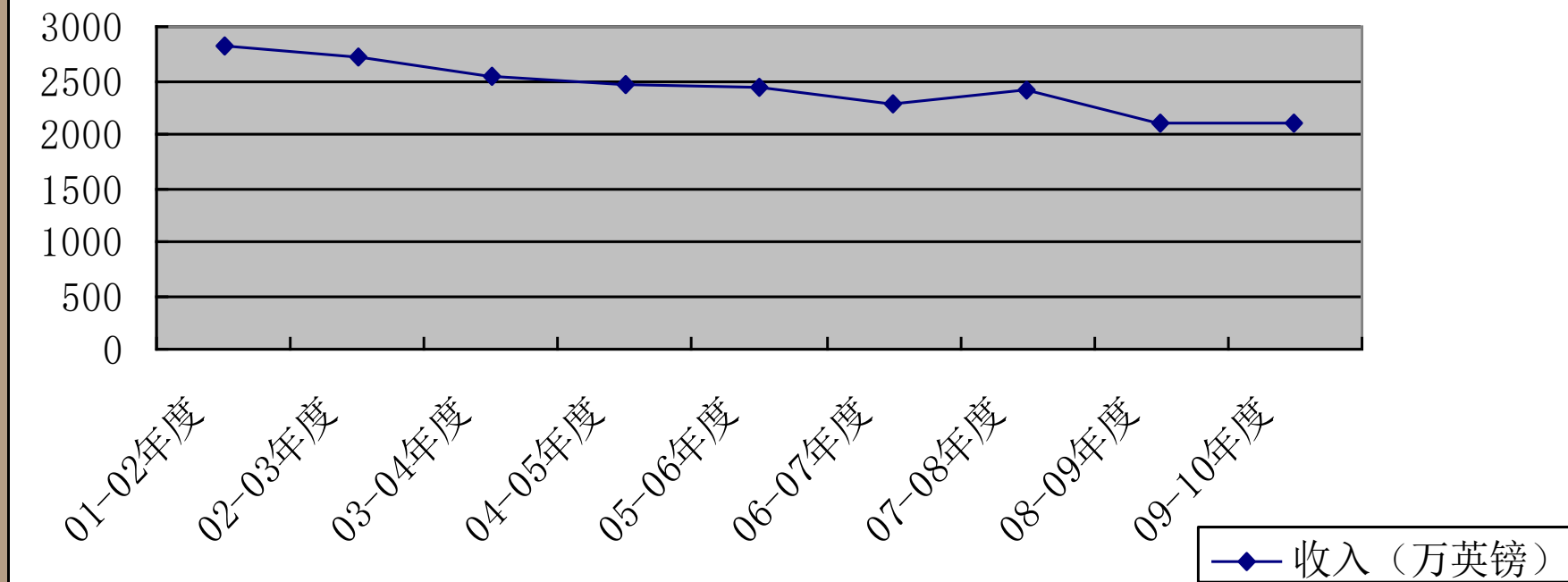
**Items consulted online, onsite and through remote delivery<sup>1</sup>.** Includes physical and electronic items consulted in Reading Rooms, items consulted on the Library website, Collection items consulted on partner websites and items supplied remotely via the Document Supply service.



Items consulted on partner websites have performed well overall although visits to the British Newspaper Archive site were 5% below target. Items consulted in Reading Rooms, on the British Library website and items supplied remotely have all been behind target.

大英图书馆、加拿大科技情报所和法国研究中心情报所等的文献传递量都在下降，例如大英图书馆自2001年以来下降了60%

大英图书馆文献提供中心业务收入统计

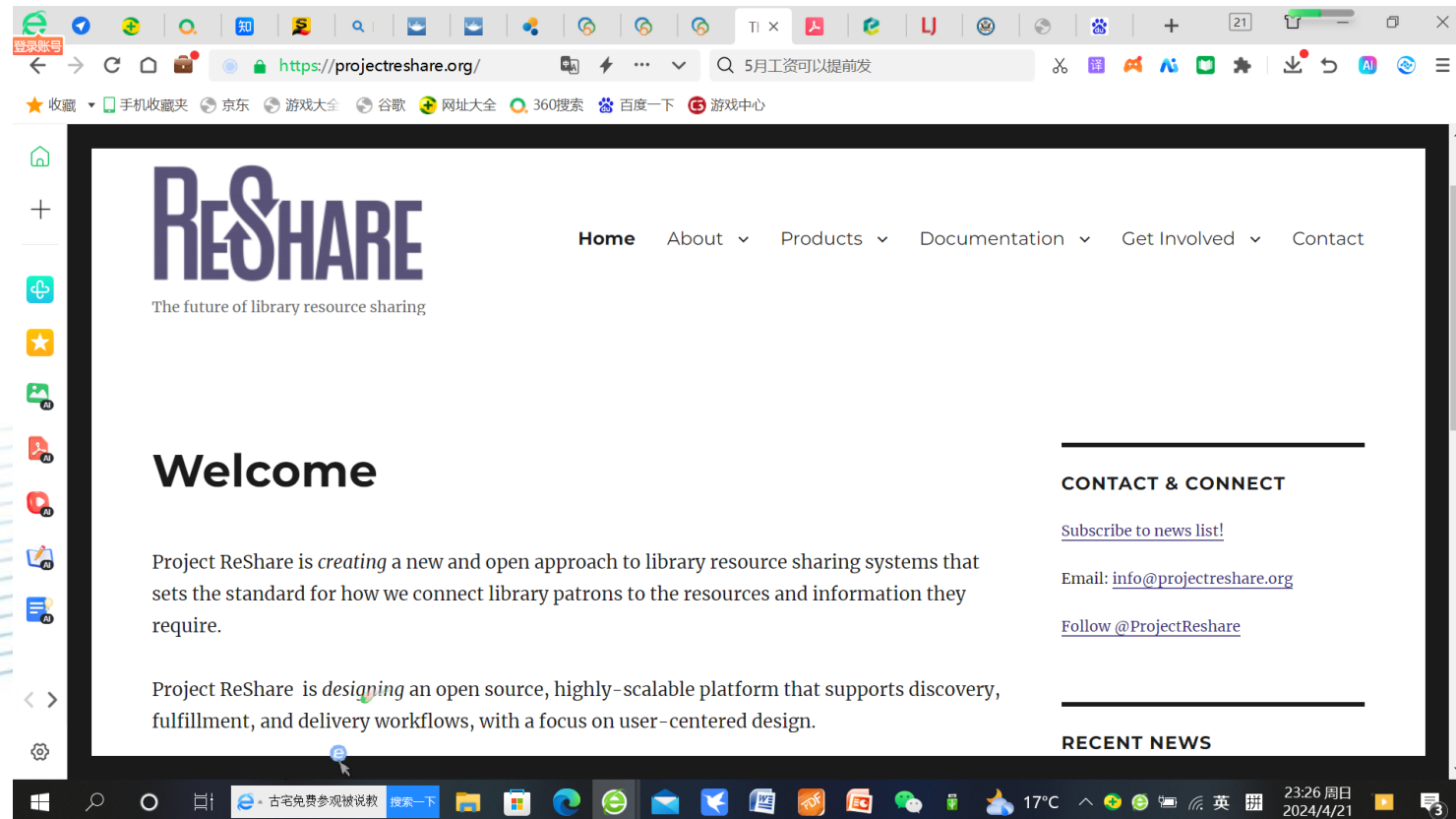


# 文献提供出现新势力、新模式



# RESHARE

The future of library resource sharing





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- Solutions ▾
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- Blog

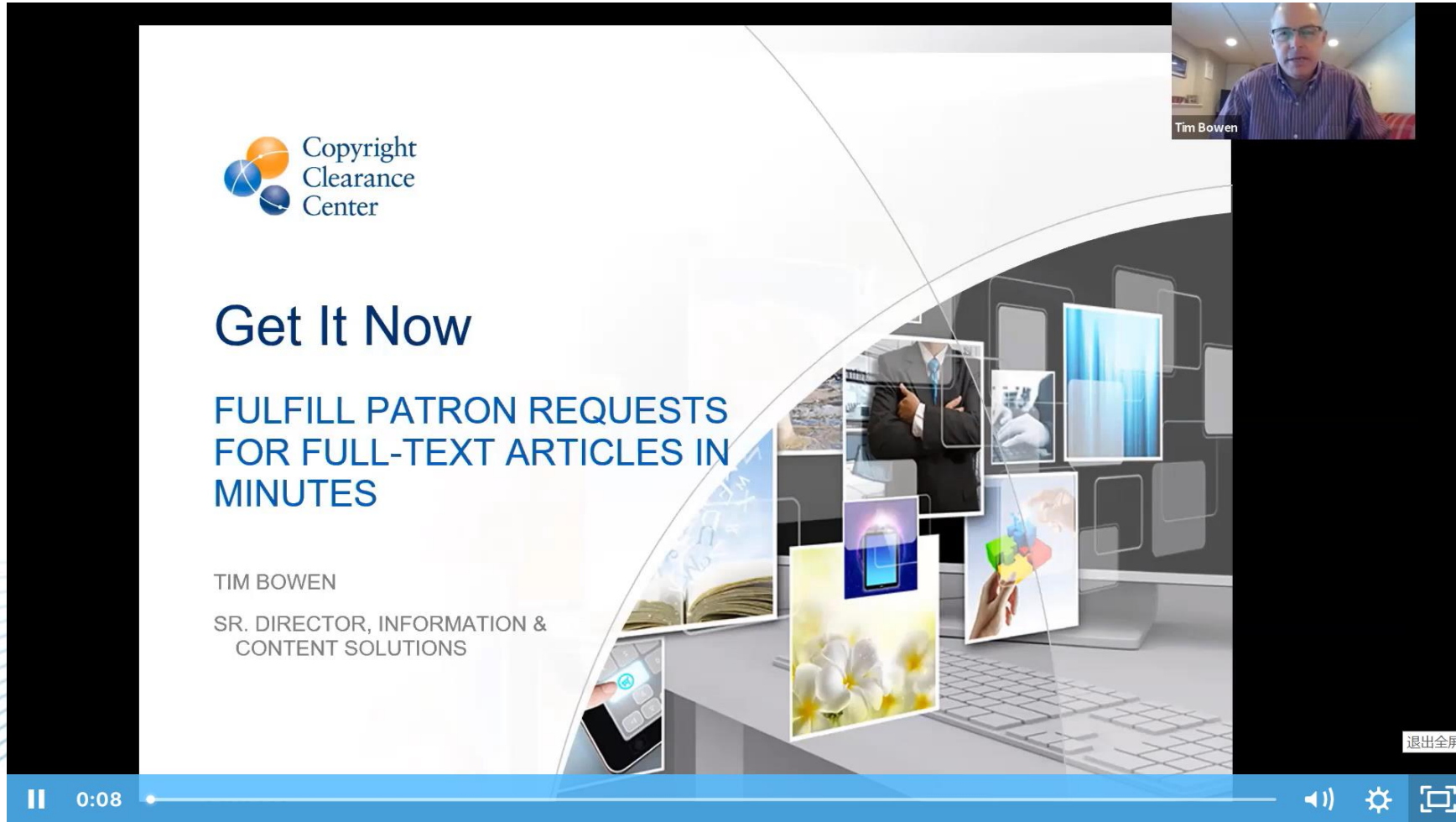
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Copyright Clearance Center

## Get It Now

FULFILL PATRON REQUESTS FOR FULL-TEXT ARTICLES IN MINUTES

TIM BOWEN  
SR. DIRECTOR, INFORMATION & CONTENT SOLUTIONS

退出全屏

0:08



Get It Now complements ILL services by providing library patrons with immediate fulfillment of full-text articles from unsubscribed journals—24 hours a day, 7 days a week. With Get It Now, patrons can quickly get the materials they need to learn, instruct, and conduct research.



Founded in 2006, Reprints Desk started out by providing hard-copy medical reprints and delivering print journal articles on demand. In 2017, to meet customers' evolving needs, the company shifted to a business model focused on electronic document delivery—and sold the medical reprints portion of the business.

Today, Research Solutions is a leading SaaS provider—powering Article Galaxy, the world's most popular document retrieval engine and research platform. Our dual company name, Research Solutions / Reprints Desk, represents our relentless commitment to progress and innovation, along with an homage to our early beginnings.

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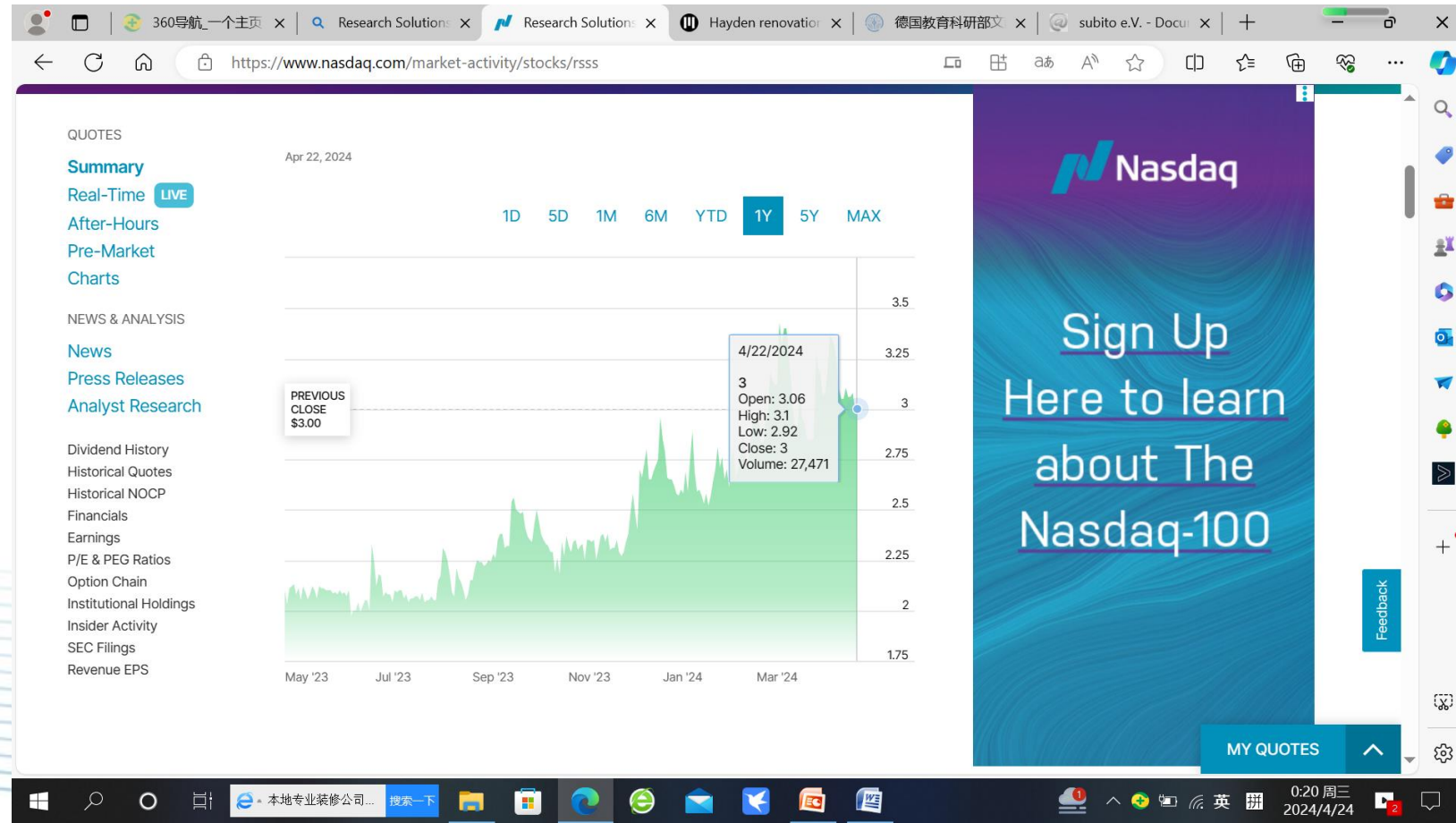
MY QUOTES

本地专业装修公司... 搜索一下

0:16 周三 2024/4/24



Research Solutions, Inc. Research Solutions, Inc. (NASDAQ:RSSS), and its wholly-owned subsidiary Reprints Desk, Inc., provide workflow efficiency solutions for R&D-driven organizations in life sciences, technology and academia worldwide. Article Galaxy, our Software-as-a-Service platform provides tools that allow users to discover, access, manage and collaborate around scientific, technical and medical (STM) content and data. Our customers range from 70+% of the top 25 global pharmaceutical companies to emerging small and medium-sized businesses.



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Article Galaxy Scholar provides cost-effective and time-saving solutions for academic institutions to supplement their interlibrary loan (ILL) needs and subscriptions, 24 hours a day, 7 days a week.

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Other organisations that are part of this ecosystem are **commercial** document supply and delivery vendors generally used to take advantage of their search and sharing technology platforms and/or to gain access to a wider range of harder-to-find content. These suppliers can also provide access to contemporary published content if they have the licence agreements in place, which can be convenient as they will aggregate various publishers into one user interface. They may also be able to offer access more cheaply than publishers can directly, due to bulk discount arrangements. Examples include the **British Library (BL on Demand)**, the **SUBITO** document delivery service, the **Copyright Clearance Centre (Get it Now)**, and **Research Solutions/Reprints Desk (Article Galaxy)**. 【P7】



## Document Delivery and Resource Sharing: Global Perspectives

IFLA Professional Report No.140

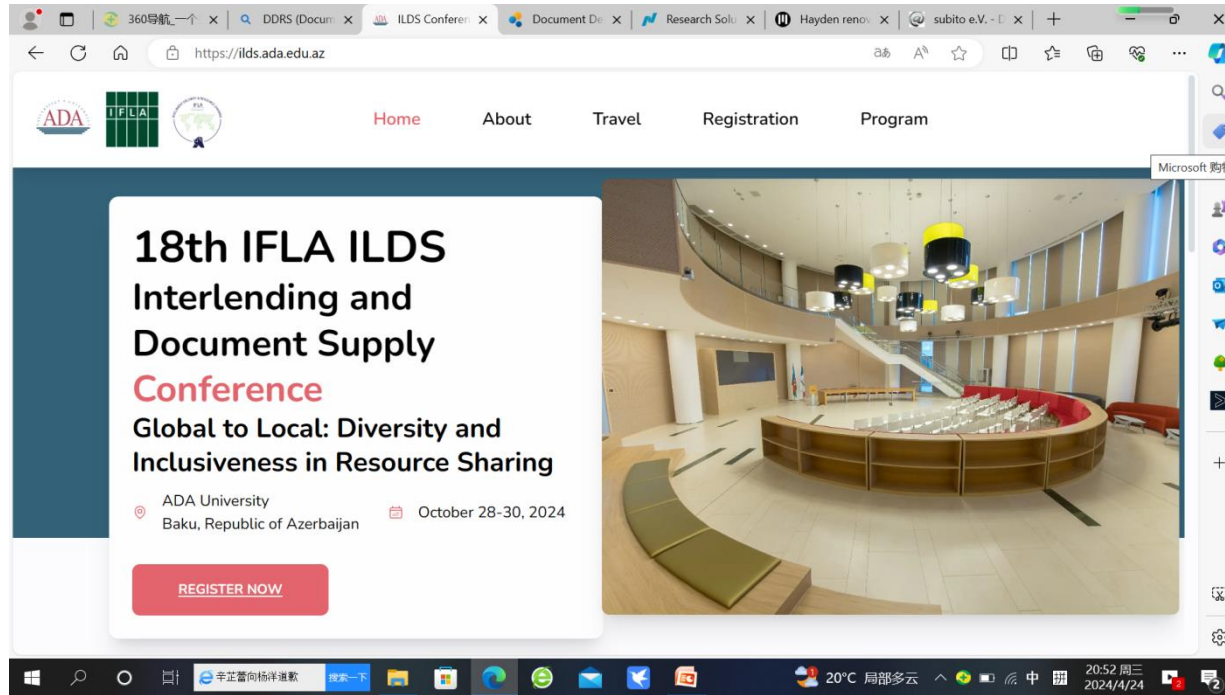
Edited by: Peter Collins

Authors: Elham Abdallah, Andy Appleyard, Lorian Maimone Ansaldo Patti, Peter Bae, Tina Baich, Tom Bruno, Ertugrul Cimen, Nicole Clasen, Peter Collins, Giovanna Colombo, Ibrahim Farah, Filiz Ekingen Flores Mamondi, Maria Carmen Lomba Gutierrez, Joseph Lenkart, Silvana Mangiaracina, Javier Martinez, Katia Medawar, Donald Taylor, Stephen Wyber and the IFLA Document Delivery and Resource Sharing Section Standing Committee

May 2023



Elham Abdallah, Andy Appleyard, Lorian Maimone Ansaldo Patti, Peter Bae, Tina Baich, Tom Bruno, Ertugrul Cimen, Nicole Clasen, Peter Collins, Giovanna Colombo, Ibrahim Farah, Filiz Ekingen Flores Mamondi, Maria Carmen Lomba Gutierrez, Joseph Lenkart, Silvana Mangiaracina, Javier Martinez, Katia Medawar, Donald Taylor, Stephen Wyber and the IFLA Document Delivery and Resource Sharing Section Standing Committee, 2023.



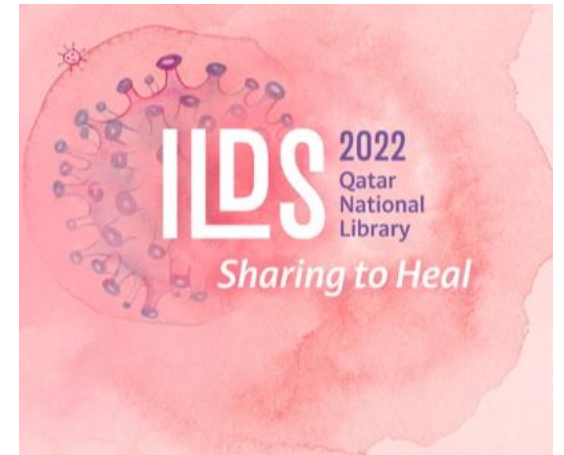
**Theme:** *Global to Local: Diversity and Inclusiveness in Resource Sharing*

Under the conference theme, “Global to Local: Diversity & Inclusiveness in Resource Sharing,” the [DDRS \(Document Delivery and Resource Sharing\)](#) would like to challenge the Interlending and document supply community to discuss on how Resource Sharing in the digital and Artificial Intelligence era is promoting diversity and inclusiveness from the global toward the local context.

# 17th IFLA Interlending and Document Supply Conference

## Sharing to Heal: Resource Sharing Through the Pandemic and Beyond

### 20 - 22 September 2022



Proceedings of the 16<sup>th</sup> IFLA ILDS conference:  
Beyond the paywall -  
Resource sharing in a disruptive ecosystem  
held at the National Library of Technology in Prague, Czech Republic, October 9-11, 2019  
Editors: Peter D. Collins, Stephanie Krueger, and Sasha Skenderija

16th IFLA ILDS Conference  
9-11 October 2019  
National Library of Technology  
Prague, Czech Republic

**BEYOND THE  
PAYWALL**

**FREE**

resource sharing in a disruptive ecosystem

National Library of Technology, 2019

Proceedings of the 16th IFLA ILDS conference: Beyond the paywall – Resource sharing in a disruptive ecosystem : held at the National Library of Technology in Prague, Czech Republic, October 9-11, 2019

- 1、图书馆提供的Resource Sharing是一种文献服务、信息服务的“形态”依然没有改变；
- 2、图书馆提供的Resource Sharing越来越数字化、越来越依靠数智化的“态势”显而易见；
- 3、以开放科学和开放创新为特征的人类知识创造范式变化正在深刻影响图书馆的Resource Sharing；
- 4、以数字（全媒体）出版、开放存取为核心的出版模式变化正在深刻改变图书馆的Resource Sharing；
- 5、在市场经济中，Resource Sharing服务“生态圈”可能是公共产品、准公共产品和私产品长期共存状态。

# 探索：转型与超越

# 03



# 智慧时代的文献服务

## ■ 文献传递进入危机时代？

智慧时代是否是文献服务的危机时代？

“文献传递”明天是否会消失？

- **Document Supply in a Rapidly Changing Environment: Here Today - Gone Tomorrow?** Mike McGrath  
*Editor of Interlending and Document Supply, Leeds, Retired Head of UK Marketing, The British Library ( ILDS2009 )*



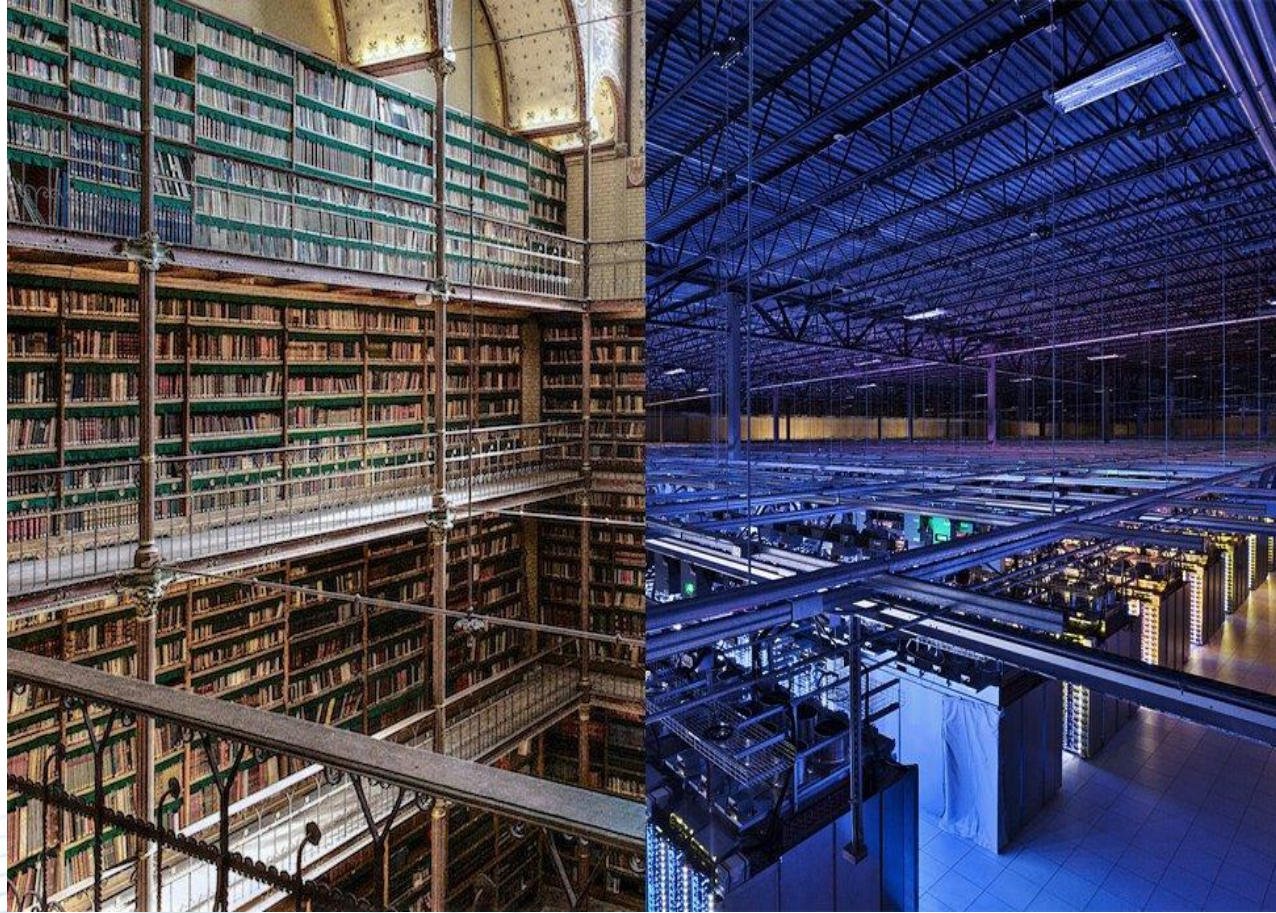
INTERLENDING & DOCUMENT SUPPLY  
12<sup>th</sup> CONFERENCE

19-21 SEPTEMBER 2011

RESOURCE SHARING  
IN THE DIGITAL AGE



From  
Collection  
to  
Connection



From  
Connection  
to  
Creation

Left: Rijksmuseum Library(荷兰国立博物馆图书馆),  
Amsterdam. [Photo by Ton Nolles]

Right: Google data center in Council Bluffs, Iowa.  
[Photo by Google/Connie Zhou]

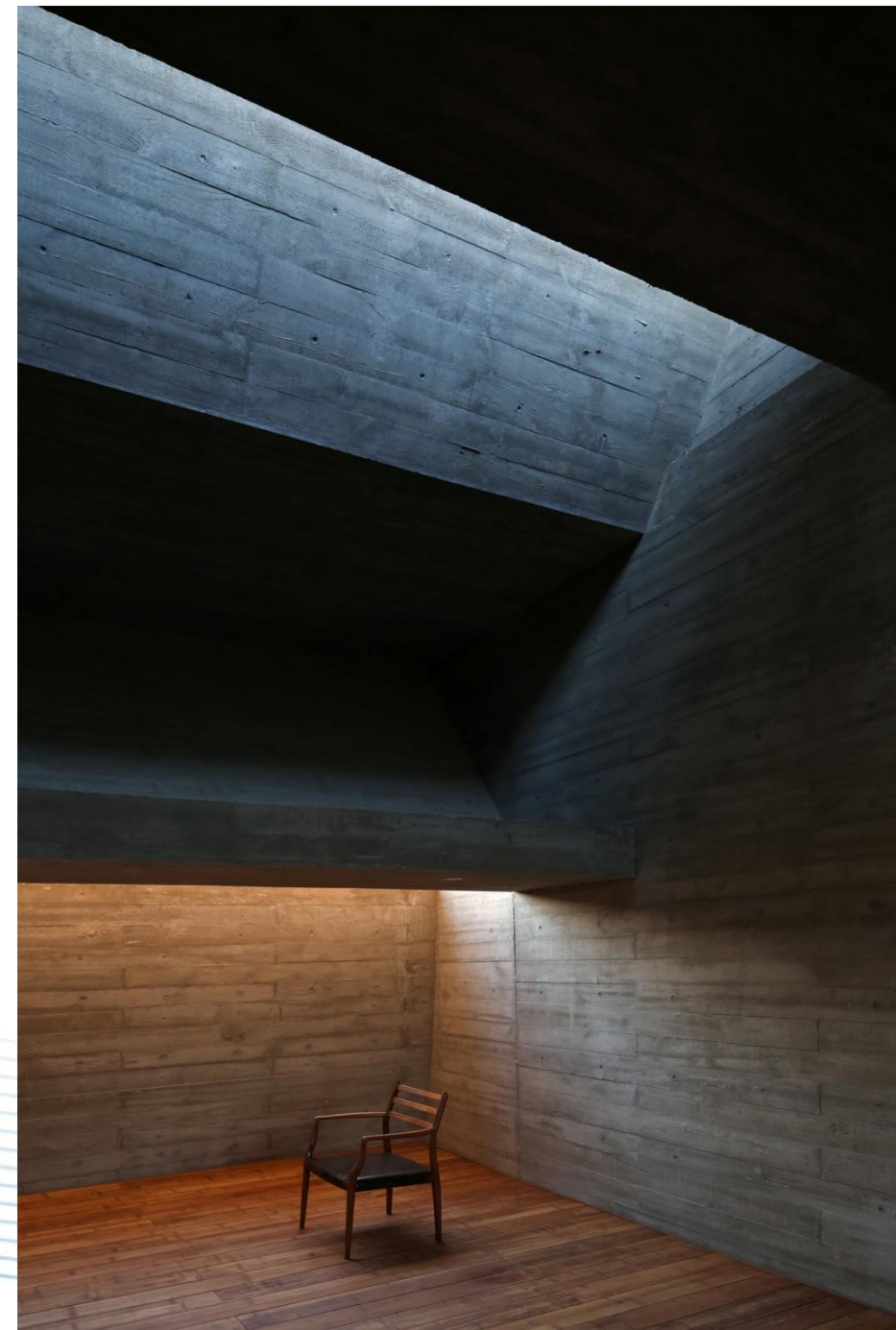
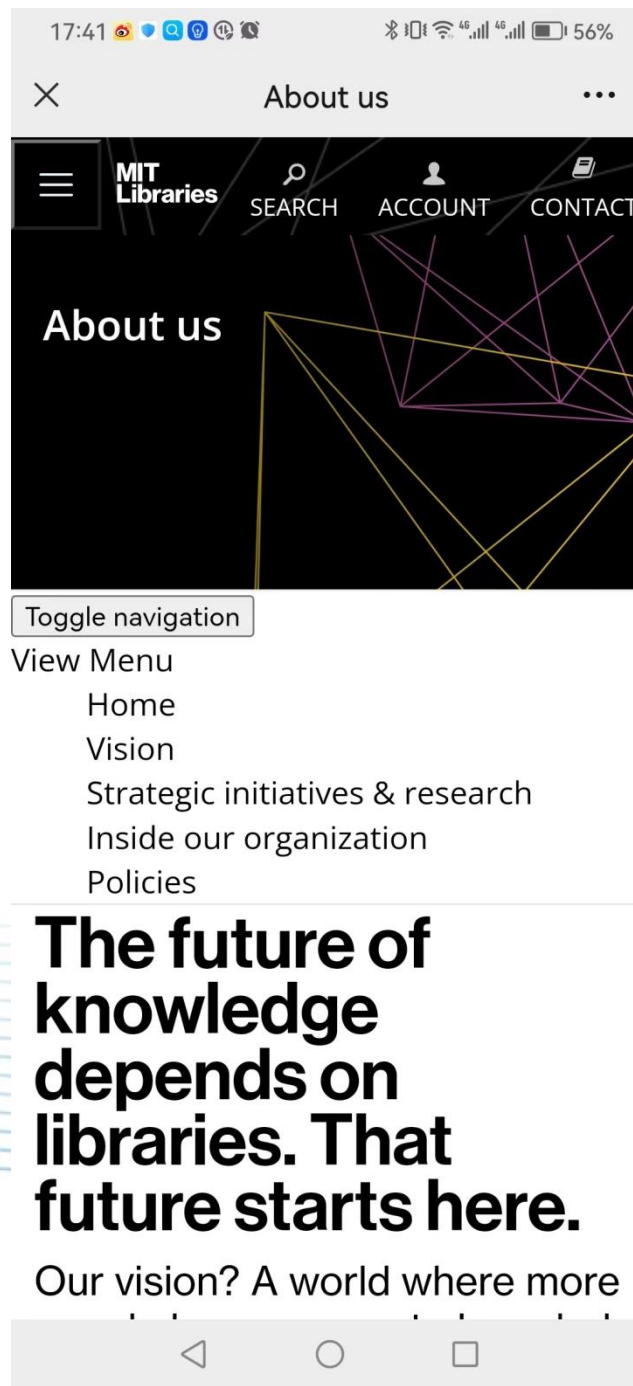
LITERACY

“超越素养（*Beyond Literacy*）”、“后素养时代（*Exploring a Post-Literate Future*）”（2012）



图书馆在智慧时代的新使命——  
培育和提升人的创造力

图书馆要始终牢记“传承文明，服务社会”的初心使命，图书馆人要始终拥有职业自信和行业自信，因为这种自信不是盲目的。





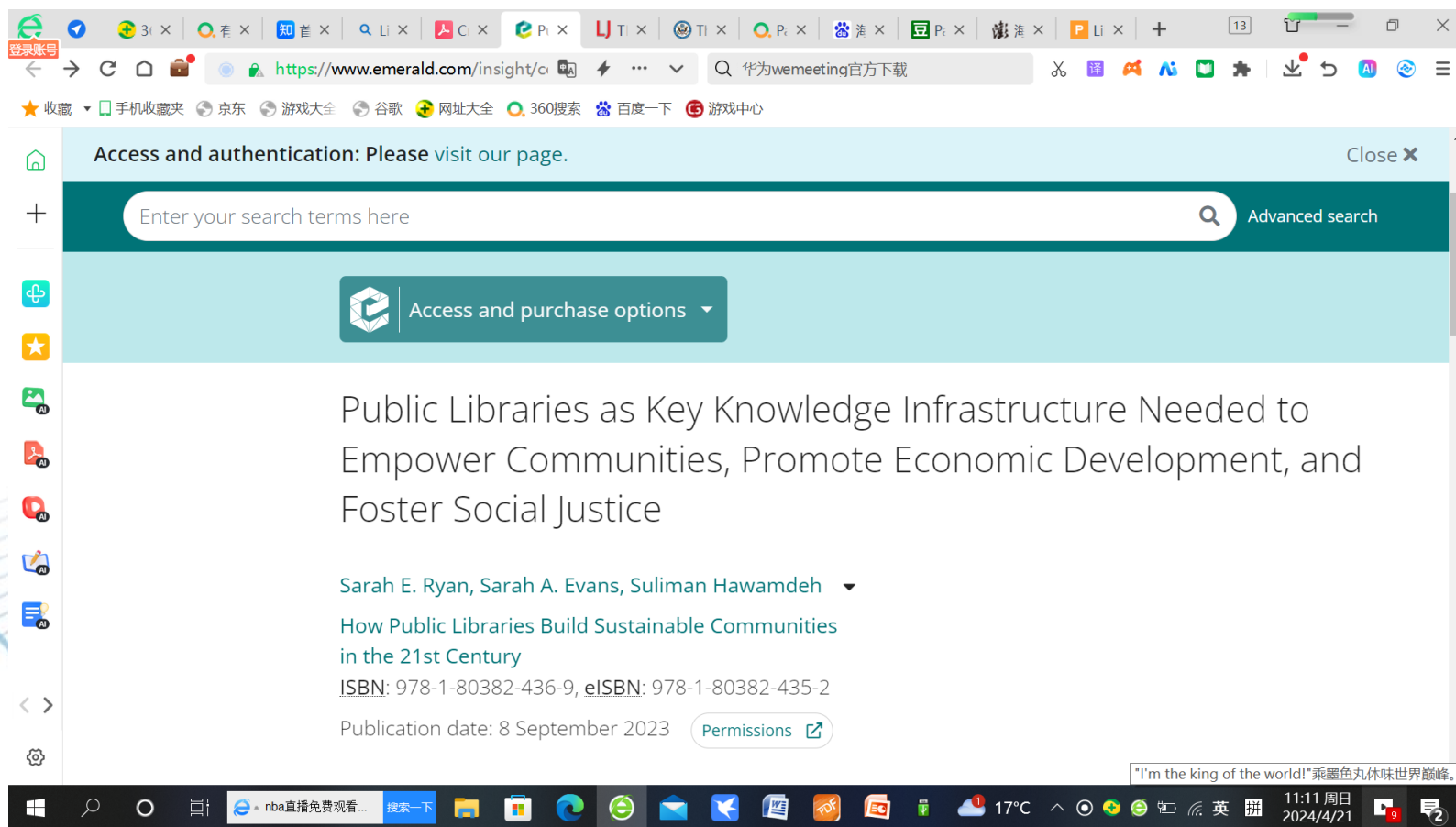
The Library is the heart of the  
University.

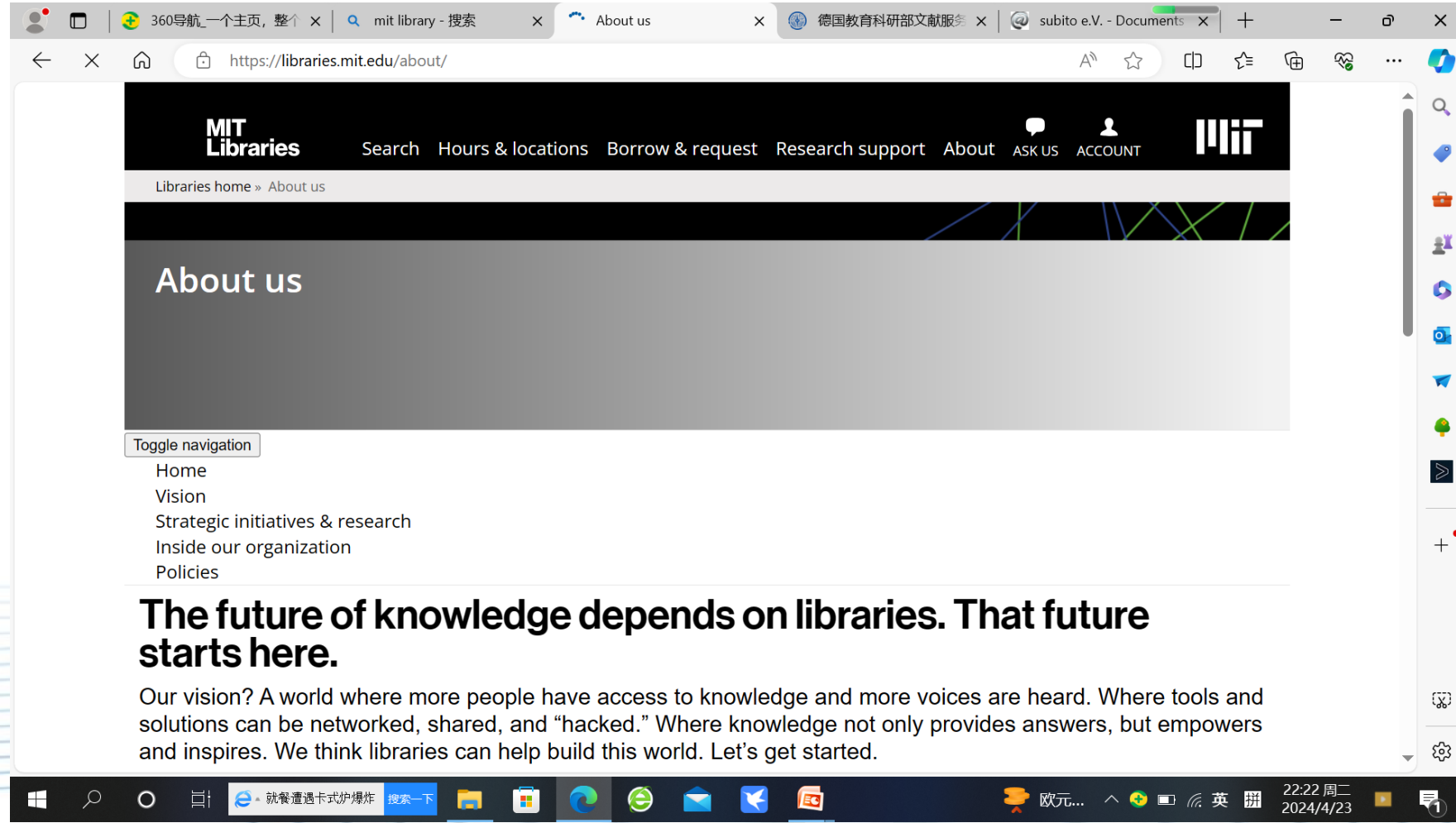
~ Charles William Eliot

AZ QUOTES



# 图书馆是关键知识基础设施





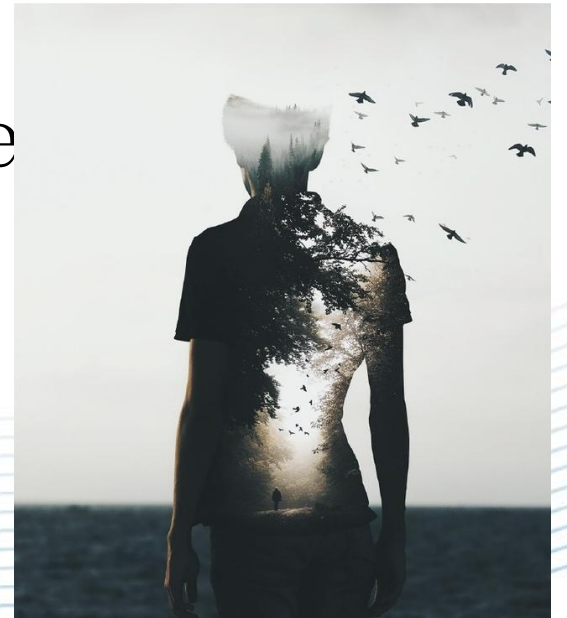
# 我们的思考与探索—— 从“要文献找上图”到“在上图做研究”

立足当下：做好传统的DDRS（ILDS）  
不断试错：发现新需求，运用新技术  
创新转型：提供（资源+工具+环境）

研究型公共图书馆+综合性情报研究中心

From Mind shift to Paradigm  
shift  
从理念变革到范式转型

Resource sharing will always be  
as much of a library art as it  
is a library science!







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(2024年4月25日, 复旦大学)

谢谢批评  
Thank you

陈 超

2024年4月25日