

needs. The lack of access to electricity and familiarity with computers in rural villages likely accounts for the low demand for computers at libraries, but the growing availability of mobile phones for Internet access as mentioned above is also a contributing factor. 99% of all users answered no when asked if free Internet access would make their libraries more useful. However, nearly all the IPRD township officers interviewed said that computers with an Internet or Wi-Fi connection would attract more visitors to the township or village library.

Mobile libraries are popularly seen as a way to overcome barriers to access, but the presence of a more permanent library building is viewed by most people as a necessary community institution. A third of respondents had heard of mobile libraries; of these, almost all say they would be useful for their community. They see mobile libraries as a way to expand the diversity of reading material their library can offer and to enable more people to access books, particularly those who spend the majority of the day working to make ends meet and do not have time to visit the library. Lack of free time was cited as one of the main reasons more people do not visit their community library. Nevertheless, it is important to underscore the fact that many indicated they would still prefer to have a more permanent library structure as they are integral to community life. In conclusion, libraries are highly valued institu-

tions which are supported in large part by their own communities. However, they do not have adequate infrastructure or secure funding to fulfill their role as community information hubs in a rapidly changing country. The fact that many citizens view community libraries as indispensable centers of community life also points to their great potential as an important local institution for community development initiatives in areas such as health and agriculture, and support to libraries should go beyond information access and consider also information sharing and civic participation. Further study is needed on the different needs and challenges of urban versus rural libraries, as well on the most appropriate ways to bring up-to-date information and services to rural libraries where the absence of reliable electricity is a real constraint. Approaches to Internet access, for example, should take into account the importance of mobile phones in terms of connectivity as identified by the survey, but a more detailed analysis should be made to better ascertain the different types of information needs for different purposes that can best be delivered through Internet access via computer or mobile phone. Finally, given the high standing of libraries in community life and the large number of libraries operating on voluntary staffing and donations, innovative and dynamic approaches to attracting funders, volunteers and users by successful libraries should be documented and disseminated widely.

The Asia Foundation is a nonprofit international development organization committed to improving lives across a dynamic and developing Asia. Headquartered in San Francisco, The Asia Foundation works through a network of offices in 18 Asian countries and in Washington, DC. Working with public and private partners, the Foundation receives funding from a diverse group of bilateral and multilateral development agencies, foundations, corporations, and individuals.

Myanmar Library Survey



The Myanmar Library Survey is the first in-depth nationwide study of the country's public libraries. Commissioned by The Asia Foundation in partnership with the Myanmar Book Aid and Preservation Foundation (MBAPF), the survey aimed to establish a comprehensive, current picture of the Myanmar public library system to help inform the development of Myanmar's information architecture and community initiatives. While much can be done to improve infrastructure and better support their role as information hubs, the survey reveals that citizens perceive libraries as having a significant and positive impact on community life. The survey findings will be circulated amongst key stakeholders, including governmental officials, policy makers, local and international non-governmental organizations, civil society, and local communities.



A country coming out of decades of isolation, Myanmar is now rapidly building the information infrastructure needed for its citizens to participate in the reform process and compete in the global marketplace. Myanmar's reverence toward libraries and its vast library network has the potential to aid this process. This study focuses on public libraries – defined in Myanmar as libraries registered with the government – because of their accessibility to a wider number of people and potential for scalability. In addition to public libraries, Myanmar has university, monastic, private, and specialized libraries, few of which register as public libraries.

There are 55,755 registered public libraries in the country, but only 4,868 are considered active. Prior to this study, very little was known about them. The objectives of the project were to sample active public libraries in order to:

- 1) Evaluate each library's location, condition, and capabilities, including technology capabilities;
- 2) Assess the current perception of libraries by users and non-users of libraries; and
- 3) Gather information on the country's most prevalent information needs and assess whether libraries are meeting those needs.

The field research was conducted by the survey and research firm, Myanmar Marketing Research and Development, over three weeks from October to November 2013, covering 26 townships in 13 states and regions, including the capital of Naypyitaw. Due to ongoing instability in Rakhine and Kachin, researchers were not able to include the two states in the study. In total, the researchers visited 206 different libraries and conducted 1,275 interviews with librarians, township officers of the Information and Public Relations Department (IPRD), village and ward administrators, and library users and non-users. IPRD, a division of the Ministry of Information, is the governmental department tasked with registering, supporting and monitoring libraries in the country. Both quantitative and qualitative methodologies were employed in the survey in the form of semi-structured questionnaires and guided interviews. In addition, the researchers held focus group discussions with community members.

In order to increase the likelihood of finding active libraries, the samples were drawn from the two townships in each state or region with the highest numbers of libraries. Libraries at the village (rural) or ward (urban) level – the smallest administrative units – were sampled, resulting in 190 village and 16 ward libraries. The study was skewed towards village libraries to reflect the government's focus on rural library development as nearly 70 percent of Myanmar's 55 million people live in rural areas.



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KEY FINDINGS

Libraries play a central role in village life, and they exist in even the most rural and remote communities. The majority of interviewees believe that libraries have a positive influence: 97% of them felt that their library has “some impact” to “very big impact” on community life. Many libraries were located in the center of the village or on the main road, and often functioned as a community center. The average number of borrowers per library is 57 in the past month, and the average size of the villages and wards visited is approximately 1,944 people. While the number of library borrowers is small in proportion to the population, many non-users interviewed had visited their library at least once to attend community meetings.

Library users are younger, more educated and better paid than non-users. 48% of library users are between 16 and 25 years old, whereas the largest proportion of non-users (36%) are 26 to 40 years old. 33% of users completed high school and 35% of them have attended university. In comparison, only 18% of non-users had completed high school and 20% had attended university. The predominant income category for users (28%) is between \$100 and \$150 per month, while the largest percentage of non-users (32%) earn between \$50 and \$100 a month. This may be explained by the fact that more users come from households where the primary breadwinner works for the government or private sector, whereas non-users tend to be employed in low-wage casual work.

Funding is very limited and often unreliable. Most public libraries have no real budgetary support. Only 44% of libraries surveyed receive funding from any source; those that receive funding reported that the average amount was \$24 a year or \$2 a month. Once a library is built, recurring IPRD support to village libraries is limited to \$20 a month for the transportation of books and journals. However, due to budget limitations not even this modest support is available to all public libraries. As a result, libraries rely on philanthropic community members and other donors to cover building maintenance, furniture, electricity and equipment.

Village libraries are staffed largely by volunteers, who are poorly compensated and trained. Due to the severe budget constraints, there is no money available to maintain paid staff and the majority of libraries rely on

volunteers. More than 80% of the libraries have less than 4 library committee members and staff, and 10% have between 5 and 10 persons on the library committee and staff. Given limited budgets, 98% of libraries surveyed have never invested in formal librarian training. Nevertheless, librarians are largely an educated group: 39% have finished high school and 31% have graduated or are attending university. Nearly half the librarians (49%) were under 40 years old, while over a third was between 40 and 59 years old. Among the 206 librarians interviewed, 67% were men and 33% were women.



Less than half of library users are satisfied with library facilities, with many lacking in chairs, tables and toilets. 91% of the libraries are one-story buildings that they own or are provided by the government, and only 3% of the libraries have to pay rent. Almost half (43%) of librarians said that their libraries need some renovations, and more than half (59%) reported that they do not have sufficient desks and chairs to accommodate users. In addition, 82% of the libraries surveyed do not have a toilet, which would suggest that people cannot stay for long in a library. On the whole, less than half (42%) of users expressed satisfaction with library facilities with few completely satisfied or completely dissatisfied.

Libraries' opening hours and fees are varied but are generally acceptable to users: 40% of village libraries open between 1 to 4 hours per day, and 44% open between 4 and 8 hours per day. 24% of the libraries open two days a week, 11% three days a week, 19% five days a week, and a surprisingly high 28% open every day of the week. Very few users and non-users cited library opening hours as an issue in their recommendations for improved library services. Membership fees and

borrowing fees when assessed were very low, and more than 90% of users were either satisfied or very satisfied with the level of fees paid.

Library collection is generally small and not sufficiently updated. The average number of books a library owns is 900, with a vast range from the smallest collection of 20 to the largest with nearly 10,000 books. Books are generally accessible to the reading public, housed mostly in open shelves with only 11% of libraries reported having closed shelves. The most prevalent subjects of books reported by librarians to be present in their collection were religious books (90%), general knowledge (88%), education (75%), health (70%), social science (50%), politics (50%), and economics (37%). 45% of libraries reported having children's books in their collection. On average, libraries receive about 80 new books and 180 new periodicals a year.

The types of material respondents most want to read are periodicals, biographies and general interest publications, such as accessibly written books on health, religion, agriculture, geography and Myanmar culture and traditions. Only a minority of people surveyed were interested in education, economics, and social science (between 11 to 17%), which reflects a difference in interest in comparison with what the libraries reported they have in their collection, as outlined above. Books in the Myanmar language are preferred; just 1% of users want English-language books.

Users are most dissatisfied with libraries' lack of variety and outdated books and periodicals. Currently, most library users visit between one and three times a week. Although the majority of users are satisfied with library hours and facilities, 59% of library users are unsatisfied with the books and periodicals available in libraries, saying that they are outdated. IPRD officers and village authorities suggested that on-time arrival of newspapers would attract users to libraries as currently newspapers often arrive one to five days late. Having access to a TV can also help provide updated information to library visitors.

Most libraries do not have basic technology. Only 55% of libraries surveyed have electricity. Almost all the libraries visited did not have a phone, television with cable service, DVD player, computer, printer, or Internet access. 96% of the libraries visited do not have a fixed

landline phone. Of the 4% with phones, four have fixed phones and another four libraries use mobile phones. Nearly three-quarters of IPRD officials recommended that having access to TV, and to satellite channels through a cable service such as SkyNet if possible, would make libraries more attractive and useful to users.

Computer ability amongst the general population is low, and computer availability at home and in libraries is almost nonexistent. Only 4% of library users and non-users have a computer at home and most have little to no computer skills. 98% of the libraries visited do not have a computer on its premises, and only two have internet connection. Almost all librarians interviewed (87%) did not know how to use a computer.

People access the internet mainly via mobile phones. Despite respondents' widespread unfamiliarity with computers and unreliable electricity, 9% of library users and 16% of non-users say they have access to the Internet. Of those with internet access, 72% of non-users and 58% of users say they do so via their mobile phones. 80% of those who go online said they connect to the Internet primarily to read news. Both users and non-users alike do not yet see public libraries as a place for Internet access; only 11% recommend equipping libraries with computers or highlight Internet access as a service that would improve libraries.

Communities defined their top needs as better road infrastructure, electricity and mobile phone coverage. The development of road infrastructure was singled out as a significant need in half of the focus group discussions and nearly all the key informant interviews. Adequate electricity supply and better mobile phone network coverage were also highlighted as community

