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Interlibrary Loan: Integral Component of Global Resource Sharing

Robert A. Seal

Loyola University Chicago, rseal@luc.edu

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Recommended Citation

Seal, Robert A.. Interlibrary Loan: Integral Component of Global Resource Sharing. IFLA/SEFLIN International Summit on Library Cooperation in the Americas, , : , 2002. Retrieved from Loyola eCommons, University Libraries: Faculty Publications and Other Works,

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April 19, 2002

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Robert A. Seal, Texas Christian University

IFLA/SEFLIN International Summit on Library Cooperation in the Americas
Miami, Florida, April 19, 2002

I. Introduction

A. Globalization of information and librarianship

When I became a librarian 30 years ago, I could not imagine the profession as it exists today. In 1972, my first position was circulation librarian in a large research library with very little automation, long before PC's, fax machines, and the Internet. Our library had an extensive collection of foreign materials acquired the old-fashioned way, using telephones, mail, overseas travel, and printed bibliographies. Interlibrary loan was an integral part of our resource sharing activity, though not carried out at today's level nor with the ease that computers and networks allow it to happen, nor was there much international traffic.

Now, in the year 2002, at the beginning of the third millennium, our library and our interlibrary loan worlds are dramatically different. Most activities are automated and the computer is the primary research tool. We carry out collection development by consulting online databases and by utilizing vendors' Web sites. Interlibrary loan is almost entirely computerized with verification, communication, and transmission of documents mostly accomplished via the Internet. But these significant changes did not happen overnight: it was an evolutionary process which paralleled developments in technology and librarianship, as well as changes in attitudes toward resource sharing.

In today's world, information has become globalized and this fact has had a profound impact on academic and research libraries. In developed countries, patrons have at their fingertips a cornucopia of information resources from around the world at relatively low cost. Electronic full-text, access to the online catalogs of the world's leading libraries, and the World Wide Web have saved time and effort and have dramatically increased productivity for students, scholars, and researchers. Barriers of time and distance have almost disappeared and user expectations have risen dramatically.

And yet, such advantages are not ubiquitous. Many countries have mediocre library systems, limited or unreliable telecommunications, few personal computers, minimal and

expensive Internet access, insufficient fiscal resources, and a lack of government commitment for library service. These issues are being addressed by library professionals and organizations such as the International Federation of Library Associations and Institutions (IFLA), but progress is slow due to differing political systems, unstable economies, and the complexities of the world we live in.

B. Importance of library cooperation and resource sharing

It is in this context of global information and an imbalance of library resources that the critical nature of resource sharing becomes apparent. If we as professionals are to serve our own patrons and at the same time ensure the free flow of information to the citizens of the world—and I believe we have that dual role—then we must promote, participate in, and enhance systems of library cooperation to share our limited resources. Those of us working in colleges and universities in the so-called developed nations, have long been accustomed to participating in cooperative ventures, primarily to control costs and to improve access to books and periodicals. But in many countries this tradition does not exist, or is a relatively recent development.

Primarily, resource sharing activities have grown out of the need to provide our users with the necessary resources for research, study, and teaching. We have also been driven to cooperate due to 1) the high cost of books and periodicals; 2) a need for better access to bibliographic data; 3) increased demand for materials not held locally; 4) advances in technology, especially computer networks; 5) political pressure by one's own institution and peers; 6) a sense of goodwill; and most recently 7) the need to support distance education programs. These are all reasons for active participation in programs of interlibrary loan, reciprocal borrowing, cooperative cataloging, and more. However, of all the many forms of library cooperation, interlibrary loan is the primary and most visible activity. Further, in this era of globalization, international interlending has taken on even more importance with users more aware of, and having a greater need for, foreign information resources.

C. Topics to be covered

This paper is presented to underscore the growing importance of international interlibrary loan, especially for academic and research libraries. It will offer an overview of the various aspects of the topic including, but not limited to, the nature and need for international interlibrary loan; benefits; the role of IFLA; the impact of technology; obstacles and challenges; and recommendations for the future.

II. International ILL—an overview

A. Nature and need

The need for international interlending has intensified in the past decade for at least three reasons. First, the nature of scholarship has become more interdisciplinary and increasingly specialized with new fields of study appearing at a rapid rate. This has resulted in the steady publication of more and more books, journal articles, and conference proceedings around the

world. Faculty and graduate students increasingly demand and expect access to this material to carry out research in their areas of specialization, to ensure that they are not duplicating work already done, and to keep up with rapid changes in their fields.

Second, this heightened demand has caused problems for libraries because budgets have not kept pace with the rapid rise in the cost of books and especially scholarly journals. The more that is published, the less a university library can afford to buy nowadays, especially in underdeveloped and developing countries. The third factor causing growth in demand for international interlibrary loan is the ability of end users to easily identify available overseas materials using personal computers, the Internet, and large databases which include many foreign citations and imprints. Further, patrons demand and expect the needed information to be delivered quickly and efficiently, whether the source is in a library in the same city or in England, China, or Peru. I contend that the increased need for information of all types from abroad requires that we continue to seek ways to enhance our international interlibrary loan efforts.

B. Benefits

The benefits of a successful and efficient system of international interlibrary loan are well known. First and foremost, it means access to a wide variety of information resources from around the world, items otherwise inaccessible to patrons. Quality service is rendered because delivery is relatively fast, and in some cases it means that researchers do not have to travel abroad unless archival collections or a very large number of items must be consulted. The Library's acquisitions budget benefits, too, because cooperative interlending means that limited financial resources can be used to concentrate on acquiring high use items rather than more esoteric works that *might* be needed some day. When many libraries participate in an international interlibrary loan program, the costs of such activity is spread among all participants, none of which has to bear too great a load. In summary, access, service, and cost containment are the primary results and benefits of international interlibrary loan.

C. The role of IFLA

The International Federation of Library Associations and Institutions, IFLA, has long played an important role in global resource sharing. Its Office for International Lending includes the Section on Document Delivery and Interlending which is concerned with "making information in all formats available throughout the world through a variety of resource sharing and document supply techniques." Its "primary objective is to extend and improve document delivery and interlending both nationally and internationally through the use of new technologies and increased cooperation among libraries and document suppliers" [see the IFLA web page, www.ifla.org]. The IFLA programs facilitate and enhance international interlibrary loan and document supply service through guidelines, forms, and procedures, all intended to standardize and streamline the complex process of international interlending. It also offers programs on resource sharing at its annual conference, conducts workshops on interlibrary loan, and sponsors international interlending conferences apart from the regular IFLA meetings.

D. The impact of technology

Technological developments of the last three decades have had a tremendous impact on librarianship in general and interlibrary loan in particular. The World Wide Web and Internet, powerful desktop computers and scanners, online catalogs and bibliographic databases, telefacsimile, e-mail and listservs, automated interlibrary loan systems (e.g. OCLC), specialized interlibrary loan software (e.g. ILLIAD), and document scanning and transmission systems (e.g. Ariel), together have enabled library resource sharing in ways previously unimagined. Such developments have brought librarians throughout the world closer together, breaking down communications barriers, solving problems of access, and speeding up the transmission of interlending requests and document delivery. As we will see below, however, such advantages are not available to everyone.

III. Obstacles to and challenges of international interlibrary loan

A. Barriers to international resource sharing

Despite the benefits of international library cooperation, the actual act of global collaboration is sometimes easier said than done due to a number of inherent problems which impede the process. The most commonly mentioned obstacles are 1) inadequate human resources to carry out interlibrary loan, especially on an international scale; 2) insufficient funding which prevents starting and sustaining collaborative projects; 3) out-of-date computer technology, incompatible systems, and poor telecommunications infrastructure; 4) a lack of international standards for bibliographic description, record format, and exchange of data; 5) copyright issues; 6) insufficient information about foreign holdings; 7) a lack of knowledge about methods of access, regulations and policies abroad; 8) negative attitudes or mistrust; 9) lack of a resource sharing tradition; and 10) an unwillingness to share limited resources which could be lost or damaged.

B. Obstacles to international interlibrary loan

Although international interlibrary loan is impacted by many of the aforementioned barriers, significant activity occurs nonetheless, but mostly between libraries in developed nations and without much difficulty. On the other hand, interlibrary loan activity involving developing countries is less common and more problematic. In fact, in many countries there is very little cooperative activity to begin with, and that which does happen is informal and voluntary, depending frequently upon personal relationships between librarians. What follows is a brief overview of some of the more significant obstacles to activity and success throughout the world.

1. Economic barriers. The cost of international interlibrary loan is a significant barrier, especially in developing countries. Since this activity is labor-intensive and involves postage, insurance, copyright fees, and other costs, it can be an expensive proposition, especially when packing and shipping materials overseas. In poor nations, libraries barely have enough funds to pay staff and often do not even have book budgets. Besides the cost factor, libraries may be

discouraged from overseas transactions because they lack the hard currency to pay fees and because dealing with a variety of currencies and exchange rates can be problematic.

2. Copyright. Regrettably, there is not enough standardization in the world of intellectual property and this presents yet another impediment to international interlibrary loan, that is, having to deal with a variety of laws related to intellectual property and the use of published materials by researchers. If copyright of print materials was not complicated enough, the situation nowadays is more unsettled with the advent of electronic information resources which have their own set guidelines and restrictions which are still in flux. Ignorance of copyright laws and guidelines, along with the complexity of the legal issues, can slow down or even prevent international lending and borrowing.

3. Lack of information. While in developed countries such as the U.S. and Canada, librarians have easy access to bibliographic data and locations of individual titles in other libraries, such information is not readily available abroad. Simply put, one can't ask for something one don't know exists and one can't borrow an item if the location is unknown. In short, inconsistent or non-existent bibliographic control around the world is a great hindrance to international resource sharing. However, as more libraries convert their holdings into machine-readable format and connect their catalogs to the Internet, this problem is gradually diminishing. Unfortunately, there are still areas of the world where materials are not cataloged at all, let alone available online.

4. Technological difficulties. As noted earlier, a lack of Internet access is a significant barrier to international interlibrary loan. But for certain developing countries, the technology question is even more basic than that as even fax may not be available. In still other situations, there may be little or no telephone service and out-of-date, incompatible computers if computers are to be had at all. A library may even lack a working photocopy machine to reproduce an article, a technological barrier of the most basic type. Under such conditions interlibrary loan is difficult if not impossible, not to mention a low priority.

5. Reluctance to participate. A common concern of participants in international interlibrary loan is the safe delivery and return of books and microforms. With much of the world's mail service slow, inconsistent, and unreliable, this is a valid fear. The use of dependable commercial courier services may help overcome these difficulties, but the solution is a costly one and not always available. Another reason for reluctance to send materials abroad is the amount of time a book or microfilm is away from the lending library, but there is little that can be done about this since the delivery and return times alone can take several weeks.

6. Other challenges

In developing nations, the above barriers occur more often and have a greater impact than in the developed world. Elda-Monica Guerrero studied practices in Mexico and Central and South America and noted the following factors which contribute to limited interlending in that region: a) insufficient time; b) copyright; c) a lack of qualified professionals; d) slow response time regarding availability of publications and in returning materials; e) lending limited to the local area; f) incomplete collections; g) inability of libraries to handle large numbers of requests;

h) lack of fax machines and computers; i) incomplete citations; and j) few national interlending codes.

Graham Cornish, summarizing presentations from a workshop in Buenos Aires on the state of interlibrary loan in Latin America, noted huge differences from country to county. He wrote “countries seem to fall into other categories: those with systems, demand and collections; those with systems, but very limited collections and therefore little demand; and those with none of these elements in place.” This categorization could, of course, be extended to many parts of the world.

IV. Needs and recommendations for the future

A. Needs

Here at the dawn of the 21st-century, with libraries connected by the Internet and with a growing demand for information of all types from every corner of the globe, the need for international interlibrary loan is intensifying. Developed nations request items for research and scholarship, while developing countries have more basic information needs, for example, to address poverty and hunger, economic development, and health care. In either case, librarians can help provide the needed resources through programs of cooperation, especially interlibrary loan and document delivery. But this is not always easy, especially where human, financial, and library resources are in short supply.

What, then must be done to resolve these problems and improve interlibrary loan service abroad? Anaba Alemna, a library science professor in Ghana, Africa, pointed out that “Librarians in developing countries have a lot of “homework” to do in order to develop successful document delivery programs.” In particular, each country should take responsibility for making available the publications produced within its own borders in order to be able to participate in international resource sharing. He also pointed out that “The future of document delivery in these countries depends very much on the proper development of national bibliographies and union catalogues.”

He went on to suggest that developing countries need a) better record keeping of document delivery transactions for planning purposes; b) union catalogs and union lists of serials; c) more workshops and training for librarians; d) increased use of technology (especially CD-ROM) to access information not easily available otherwise; e) better methods of delivery other than the postal system; and f) positive government attitudes of toward library development.

In her study of Latin American libraries cited earlier, Elda-Monica Guerrero listed several requirements for improving interlibrary loan of all types in that region: countries need to create national centers for establishing and administering interlibrary loan, both internal and external; a better understanding of technology for improving service; systematic acknowledgement of copyright laws with respect to photocopies; uniform approaches to keeping interlibrary loan statistics; and regular training, which she sees as very important to success, especially in developing countries where staff turnover is high.

B. Recommendations

In addition to the suggestions made by these African and Mexican colleagues, I have a few recommendations of my own for North American and European colleagues in terms of what can be done to promote and improve the global interlibrary loan system. While the prospect of improving international interlibrary loan service may seem daunting, there are things that individual libraries can do to make a difference.

1. Provide free overseas interlibrary loan to underdeveloped and developing countries

Though the trend nowadays is to charge for interlibrary loan service, this may be more trouble than it is worth when dealing with foreign requests. Dobson and Pedersen made an excellent point: "Reasons for not charging range from pragmatic ones, such as difficulty with currency exchange and the expense of invoicing, to philosophical ones about the need for libraries to provide free access to information and not to penalise those who cannot afford to pay." Unless a library handles large numbers of international interlibrary loan requests, it may be simpler not to charge. I offer an even more basic reason: we can afford to do so, at least within limits.

2. Establish reciprocal agreements

Reciprocal agreements between institutions are the heart of interlibrary loan activity in the United States and other countries. This means giving processing priority to partners' requests and providing cost-free loans. The results are reduced costs, less paperwork, and faster turnaround. I recommend that more such accords be established between and among libraries in different countries to increase the level international activity and to improve service to all our users.

3. Promote standards for interlibrary loan service

The library profession should continue its efforts toward standardization in order to facilitate the exchange of data and documents. International interlibrary loan standards have the potential to permit end-users to search for an item, place an order, and receive the material, often electronically, all with minimal intervention by a librarian. Unfortunately, due to infrastructure and political issues, such developments will have little impact on librarianship in developing countries any time soon. Nevertheless, we should strive, cooperatively and internationally, toward the creation of standards for interlending.

4. Keep up with developments in the field

With the library world changing so rapidly, it is important for the interlibrary loan librarian, and library administrator by the way, to be knowledgeable about changes and progress in the field. As such, we all need to regularly attend resource sharing workshops, read the library literature, and subscribe to appropriate listservs. Conferences such as this one sponsored by SEFLIN and IFLA play a critical role in keeping up-to-date and in setting the stage for future cooperative activity based on contacts made and ideas generated.

5. Be a risk-taker

International interlibrary loan is a risk. Library collections sent across borders will be away from the library for a long time and could be lost or damaged. Requests and payments may be difficult to handle and will take extra time. Nevertheless, for reasons stated earlier, libraries should not hesitate to become involved in international resource sharing. The potential payoff is significant: the patrons will obtain the needed information and the library will be participating in a cooperative venture that contributes to the important goal of access to global information.

V. Conclusions

In conclusion, interlibrary loan is an effective tool for meeting our patrons' changing needs. The results can be both improved access to global information and a reduction in the gap between the haves and have nots of the library world. The success of international interlending depends in large part upon the ability to overcome a number of barriers as well as a willingness to compromise, a desire to cooperate, hard work and perseverance, and additional financial resources. Fortunately, although significant obstacles do exist, there are many instances of success due to hard work, ingenuity, and a commitment to resource sharing. A lack of adequate collections, insufficient information, and limited funding will continue to be major roadblocks to participation in many parts of the world. However, much can be achieved through innovation, flexibility, and determination. Indeed, there have been many instances where these factors, along with the willingness to take a risk, have paid off. I urge all of you to join in the efforts to make our system of international interlibrary loan a success.

VIII. Selected bibliography

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IFLA Web page (<http://www.ifla.org>): contains information on Universal Availability of Publications and its Section on Document Delivery and Interlending.