

From Courtesy Letters to Digital Copies: Interlibrary Loan — Experiences of the University Library “Svetozar Marković” in Belgrade

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ABSTRACT: This paper presents the development and transformation of interlibrary loan services at the University Library “Svetozar Marković” in Belgrade, from their earliest beginnings to the present-day practice, which is substantially transformed. Interlibrary loan is examined as a specific form of scholarly documents exchange — one of several modalities for the organization of information and documents that gained considerable momentum in the immediate aftermath of World War II, when science was assigned a prominent and autonomous role in society. By virtue of the nature of the materials it encompasses, this activity has been uniquely positioned to bear witness to a wide range of developments in the communication field of science, spanning virtually all of its disciplines. The paper identifies and describes the successive stages of development and transformation of this service, as well as the corresponding shifts in scholarly communication.

KEYWORDS: interlibrary loan, scientific documents supply, structures of scholarly documents, University Library “Svetozar Marković”.

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Aleksandra Pavlović

pavlovic@unilib.rs

*University Library
“Svetozar Marković”
Belgrade, Serbia*

*Translated from Serbian:
Mina Dizdar*

1 Historical Overview

Resource sharing and scientific documents supply — designations that are increasingly replacing the classical term “interlibrary loan” — constitute

a professional activity whose methodology, scope, content, and indeed its newer term have been shaped by profound changes in information technology, as well as in copyright law and intellectual property. At its foundations, however, the activity has preserved the same principles that guided it in ancient times, above all the principle of *noblesse oblige*: a great library has always lent books to its less affluent counterpart (Kenney 1971, 121). Ever since the time when the Library of Alexandria (Figure 1) lent part of its collection to the Library of Pergamon — its greatest rival — as this evocative image is often invoked in the literature, despite the absence of reliable historical sources, major libraries have regularly lent books to all who requested them.



Figure 1. O. von Corven: The Library of Alexandria

We do not have any authenticated records of the exchange of papyrus and parchment from that era, a period marked by fierce competition between the two greatest libraries of the ancient world; however, the active use of sources recorded in the hidden catalogues of monastic libraries can be traced with considerable clarity throughout the Middle Ages. One of the earliest documented instances of both lending and copyright is preserved in the legend of St. Columba. Around the year 560, St. Columba, during a stay at a monastery, secretly copied a psalter belonging to his teacher, St. Finnian. The case was adjudicated by the Irish king Dermott, who ruled in favor of St. Finnian; his judgement became foundational for all subsequent legislation on the lending of such materials and on copyright: “To every cow her calf, and consequently to every book its copy” (Cornish 2003). From the fifteenth to the nineteenth century, as can be seen from these instances of “getting personal in the margin” (Kwakkel 2014), all the great libraries that emerged across Europe shared their collections in one form or another (Hessel 1977).

Marginalia found throughout collections of medieval manuscripts attest to a practice of lending among scriptoria across Europe. For example, the transcript of Saint Augustine in the glosses of Peter Lombard's *On the Trinity* (*De Trinitate*) at Trinity College, Cambridge, dating from the eighth century, contains a list of books serving as a kind of medieval catalogue of the episcopal library in Würzburg (Figure 2). Based on the notes inscribed by librarians in the margins alongside this list, it is possible to reconstruct an extensive loan practice between that library and the libraries of the monasteries at Fulda and Holzkirchen during the eighth century (Lowe 1928, 11).



Figure 2. *Saint Augustine in the Glosses of Peter Lombard*, Trinity College, Cambridge (Kwakkel 2014).

Independent of these courtly forms of the activity, the beginnings of systematic practice are associated with the work of the French humanist and astronomer Nicolas-Claude Fabri de Peiresc (1580–1637), who established this type of cooperation among the Royal Library in Paris, the Vatican Library, and the Barberini Library in Rome in the seventeenth century. Alongside him, mention should also be made of Gabriel Naudé, whose work *Advice on Establishing a Library* remains to this day a compelling, if not entirely contemporary, read.

2 Interlibrary Loan in Yugoslavia and Serbia

The activity was systematically established in both the United States and Europe at the turn of the twentieth century, in nearly parallel developments.

Yugoslavia occupied a notable position within the well-developed network of interlibrary loan in Europe during the interwar period. Its trajectory was, however, repeatedly disrupted for political reasons. The Archive of the University Library “Svetozar Marković” preserves early correspondence with European libraries concerning the book lending. The earliest evidence of the activity’s modest beginnings is recorded in the *Guide to National Information, Loan, and Exchange Services* published by the International Institute of Intellectual Cooperation (*Guide des services nationaux de renseignements du prêt et des échanges internationaux*, second revised edition, 1933). The Guide contains one of the earliest references to lending activity in Yugoslavia — a brief note on the existence of the practice in Yugoslav libraries, along with the address of the Bureau for the Exchange of Publications at the Ministry of Foreign Affairs, which at that time functioned as the central institution for interlibrary loan activities (Павловић 2012, 13).

In addition to the Guide, a significant source is the questionnaire distributed by the National Library of Switzerland in the lead-up to the IFLA Madrid Conference of 1935 (Godet 1937, 5–7). The questionnaire, which included comparative statistics on lent publications, was filled out by a small number of IFLA member states, among them Yugoslavia — specifically the university libraries in Belgrade and Zagreb (14–15). The Archive of the Swiss Library Association (*Association des bibliothèques et des bibliothécaires suisses*) preserves the response of Uroš Džonić, Director of the University Library in Belgrade, addressed to the University Library in Bern (Figure 3), as well as, filed under the same reference number, the response of the University Library in Zagreb. As is apparent in both cases, interlibrary loan had not yet been established as a formal service; nevertheless, it may be inferred that from the time of this survey onwards, the activity began to receive considerably greater attention. Although it was not registered as a national centre for interlibrary loan, the University Library “Svetozar Marković” had effectively fulfilled that role by virtue of the volume of its operations, even in the pre-war period.

It is worth recalling here the era in which the University Library in Belgrade was inaugurated. At precisely that time — or, more accurately, two years thereafter — the prevailing practice of the activity across Europe was described in the following terms:

“But if you want a book from France, it has to go through diplomatic channels. In other words: the library writes to the Ministry of Education, the Ministry of Education approaches the Ministry of Foreign Affairs, which contacts the Danish

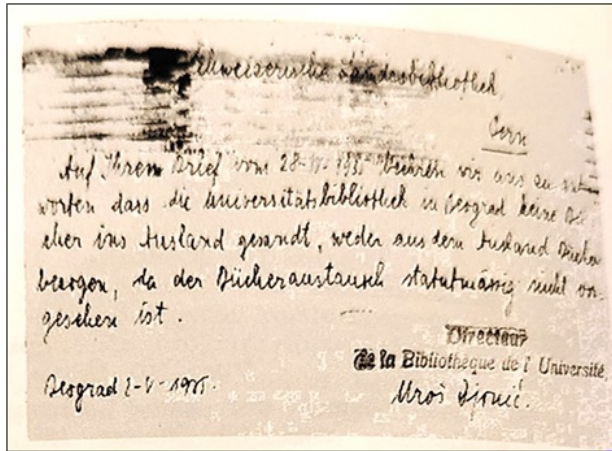


Figure 3. The response of Uroš Džonić

Legation in Paris. The Danish Legation writes to the French Ministry of Foreign Affairs, which forwards the request to the Bibliothèque nationale de France. The book is then returned by the same route, from ministry to ministry, until it finally reaches the library. And the Danish professor who once needed a manuscript to be sent from Paris.” (Drachmann 1928, 35)

3 The University Library “Svetozar Marković”: Stages of Development

Scientific documents supply was formally established in the immediate aftermath of World War II, a period in which science was accorded an unprecedented role in society, accompanied by the largest investments in scientific research to that point in history. By virtue of the nature of the materials it encompasses, this activity is uniquely positioned to illuminate not only the internal changes within the service itself and within basic science, but also a range of less visible structures within the communicative field of science and culture. In this sense, it constitutes a significant record of shifts in the philosophy and sociology of science.

From the 1960s, when interlibrary loan became a regular activity in all major libraries, professional practice operated under a regional model for the

distribution of responsibilities. The coordinating institution for Serbia was once again the University Library “Svetozar Marković” in Belgrade (ULSM), and it is possible to identify at least three distinct stages of the activity’s development. An earlier paper (Pavlović 2010) provides a detailed account of these stages up to 2009. As the most recent stage is still ongoing, it should be noted that its defining tendency — particularly over the past five years — has been one of continuous transformation and redefinition of the activity (Figure 4).

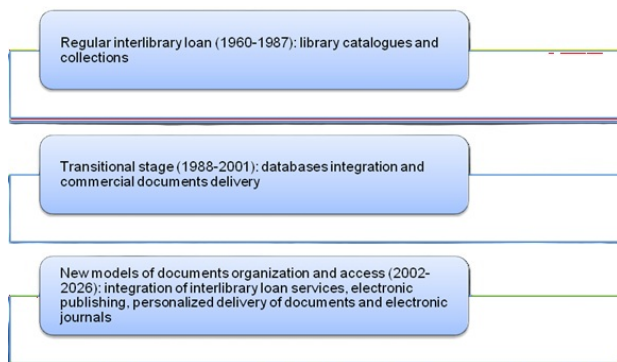


Figure 4. Stages in the development of interlibrary loan at the ULSM

Within the decentralized system, the interlibrary loan network prior to 1988 comprised the University Library “Svetozar Marković”, the National Library of Serbia, the Central Library of the Serbian Academy of Sciences and Arts (SASA), and the Matica Srpska Library. In practice, all types of libraries participated in the loan process. As is also the case in the European context, the reconstruction of this period was only made possible through a combination of quantitative and various qualitative methods (surveys, interviews, and personal communications). Annual reports and statistical data from these libraries attest to a considerable level of activity during this period: cooperation was maintained with over 300 libraries worldwide, and the total number of requests ranged from several hundred in the early 1960s, to more than 4,500 in the mid-1980s (Figure 5).

Until the mid-1970s, the majority of requests concerned monographic publications in the social sciences and humanities, with the ratio between

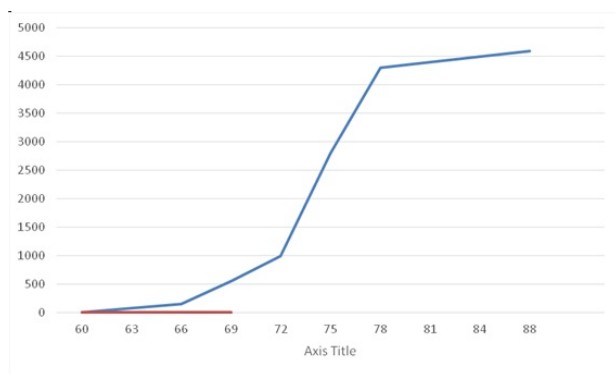


Figure 5. Number of outgoing and incoming requests, 1960–1987.

these two fields standing at approximately 3:1 in the early 1960s. From the mid-1970s, this balance began to shift: requests from the humanities and social sciences declined, while those from the natural and technical sciences increased (Павловић 2012, 134). The structure of loan requests during this period is illustrated in Figure 6.

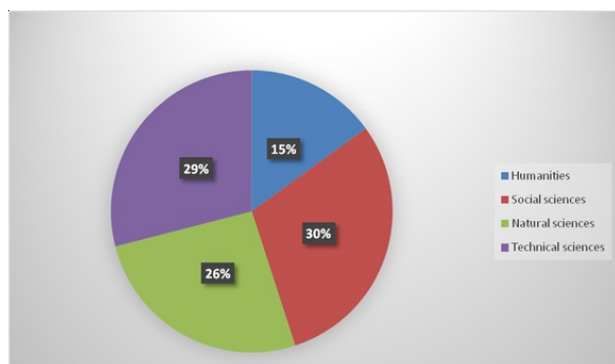


Figure 6. ULSM: Structure of interlibrary loan requests with foreign partners by scholarly fields, 1960–1987.

Mention must also be made of the discrete interlibrary loan systems that operated during this period — specifically the separate systems established for particular scientific disciplines, most notably the biomedical and technical sciences. These functioned entirely independently of the general system and were almost invariably excluded from statistical reporting, despite accounting for nearly 70% of Yugoslavia's total lending volume (134).

Hampered by an unconsolidated information infrastructure, characterized by unplanned and uncoordinated development, inadequate funding, and persistent difficulties arising from unregulated foreign currency transactions, the interlibrary loan service during this period nevertheless constituted an active function of the ULSM within its broader European context.

The transitional stage of 1988–2001 is characterized by the consolidation of information technologies, initiated within the framework of the Yugoslav Scientific and Technological Information System (1987), the establishment of shared cataloguing, and the integration of databases into the information retrieval chain. Analysis of requests from this period revealed a structure not significantly different from that of the earlier phase; however, the conditions were created for a fundamental shift in the model of access to scholarly information. Nevertheless, the wartime circumstances of the 1990s in Yugoslavia and the resulting disruption of international communication arrested the emerging momentum in the development of library and information services. The failed attempts to establish a library network for Serbia, the discontinuity in the acquisition of serial publications and databases and the breakdown of the first coordinated acquisition system, a general lack of dedicated funding, the suspension of international financial transactions, and the broader economic crisis were the principal factors that halted the development of a new model of interlibrary loan services (140–155).

The third stage of interlibrary loan development has been shaped by a multiplicity of general and specific factors that have led to a substantial redefinition of existing practices and the emergence of entirely new operational trends. This is the period of documents dematerialization, the adoption of digital content, and the development of fundamentally new possibilities for the circulation of scholarly materials. Of particular significance in this context is the emergence of open access, which has brought about a major transformation of library and information practice in Serbia.

This stage of scientific documents supply represents a “turning point” in the integration of electronic journals into scholarly practice. In the early 2000s, the University Library in Regensburg provided access to more than 6,000 electronic titles, of which 74% pertained to the medical sciences and

26% to the humanities and social sciences (Mahé 2002, 23). At the ULSM, access to electronic journals is associated with the year 2002, and the establishment of the Serbian Library Consortium for Coordinated Acquisition (KoBSON). At the same time, lending activity transitioned to electronic forms, primarily through the SUBITO service, TIB Hannover (*Technische Informationsbibliothek Hannover*), the British Library Document Supply Centre (simultaneously the oldest service with which Yugoslavia had collaborated), INIST (*Institut de l'information scientifique et technique*), and CISTI (*Canada Institute for Scientific and Technical Information*) (Figure 7).

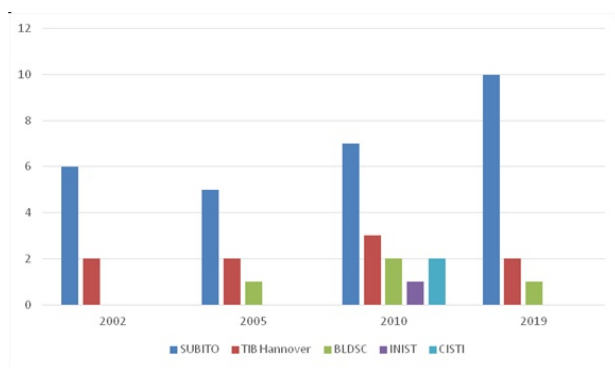


Figure 7. Documents supply services at the ULSM, 2002–2019.

The rapid increase in articles retrieved through these services prompted projections regarding a future decline in interlibrary loan requests, and the potential disappearance of the activity altogether. A similar dampening effect on request volumes was anticipated from the retrospective conversion of serial publications, particularly due to the increased visibility of older volumes and rare periodicals in electronic catalogues. This operational model, offered by major publishers regarding electronic journals and the retrospective conversion of serial publications — widely known as Big Deals — was identified as the most significant factor in the decline of the interlibrary loan. However, the experiences of the ULSM and several major libraries worldwide proved largely unexpected: the volume of lending during this period not only failed to decrease, but in fact recorded substantial growth. Alongside several rational explanations for this phenomenon (the incomplete nature of

retrospective conversion, library funding constraints, and the like), the references also offer the explanation that users will always “take one more step in seeking an elusive document” (McGrath 2007, 4).

Figure 8 provides a graphical overview of the modes of interlibrary loan at the ULSM across the stages described above, including the integration of electronic journals into scholarly practice.

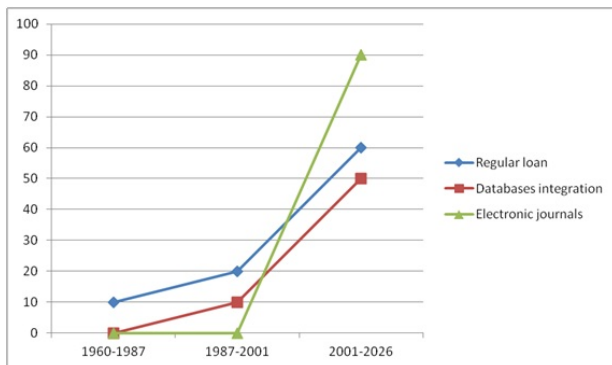


Figure 8. Interlibrary loan at the ULSM.

4 Open Lending

The line between traditional and electronic information sources is today becoming increasingly blurred, and their joint use constitutes the contemporary continuation of what was once known as interlibrary loan. At the same time, these two modalities represent the two decisive factors that have contributed to an entirely new operational space for the activity. In a world of new information technologies and the daily proliferation of new source-discovery services, evolving user expectations are reshaping the scope of the activity in such a way that regular interlibrary loan is becoming an elite option for information access. The connection of users to information sources — alongside the traditional modes of scholarly documents delivery — now entails negotiations with publishers, direct contact with authors and experts, the identification of freely available platforms, and similar strategies, all of which have substantially expanded the operational scope of the service.

The concept of “open access” in science, promoted by the Competitiveness Council of the European Union, envisions unrestricted access to academic information free from financial, legal, and technical barriers.

“Open science is a topic very close to our hearts. During the Dutch Presidency, our goal was to bring Europe to the forefront of global change and a new way of conducting research and science, based on openness, big data, and cloud computing.” (Dekker) Under this framework, for example, all scientific publications should be freely accessible by the end of 2020 (Schöpfel 2016, 150).

Scientific documents supply services and the “digital transport” chain have, in this respect, been thoroughly oriented towards open access over the past decade. To the financial, legal, and technical barriers identified above, temporal ones must be added as well: open science offers the possibility of accessing a document even before its formal publication. This is of particular significance given the widely observed slowness, unreliability, and inaccessibility of the scholarly communication system — the last of which has been described in the literature as a “Faustian bargain¹,” or as an offer by publishers that authors “would not be able to refuse!” (Waaaijers 1997).

Open access has made it possible to supply documents in compliance with legal requirements. Yet, the new era has also introduced new constraints, particularly in this domain. A considerable proportion of the scholarly material in demand is accessible exclusively on an institutional basis — for campuses, universities, and research institutes — but cannot be forwarded to end users. In the practice of the ULSM, it is also common to encounter situations in which documents that have once appeared in open access repositories cannot subsequently be published by a commercial publisher. Nevertheless, open access undeniably represents both a challenge and a new direction for lending services, even though it has been interpreted in some studies as a potential threat to the activity’s continued existence (Baich 2012, 55).

1. See: Harnad 1997: “This is the point where I have to introduce the ‘Faustian Bargain’, but let me say at the outset that this is not meant to be demonizing paper publishers at all; they, like the scholar, are joint victims of the technology and the economics of print on paper. For the Faustian Bargain is this: If you wish to immortalise your words at all, you will have to surrender your copyright in exchange, so your publisher can recover the substantial cost of getting your intellectual goods aboard the paper flotilla at all. The author must collaborate in denying access to his adverts to anyone who (or whose library) has not paid for them.”

A substantial proportion of the documents requested are available through open access channels. Although major libraries routinely conduct training sessions on search strategies, many users continue to turn to librarians for assistance — an experience also documented in libraries worldwide (55). Open access significantly facilitates the fulfillment of requests, particularly in the case of dissertations and “gray literature,” which are often more difficult to obtain through conventional means. Equally noteworthy are the considerably shorter delivery times and the costs involved, which are frequently minimal or virtually non-existent.

Figure 9 presents the documented experience of the ULSM of scientific documents supply in the period 2020–2025, disaggregated by publication type — journal articles, books, gray literature, and dissertations — and includes statistics for both regular interlibrary loan and lending from open access sources.

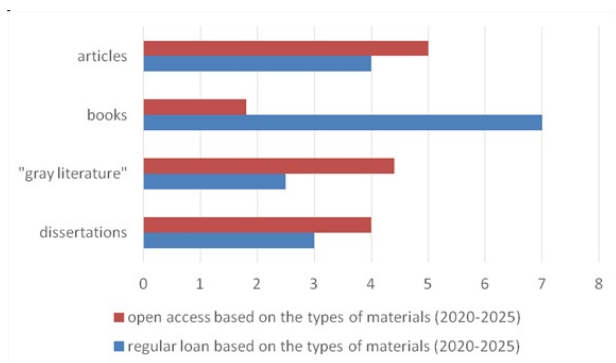


Figure 9. Scientific documents supply at the ULSM, 2020–2025.

In the case of books — particularly in the field of the humanities — regular interlibrary loan continues to take precedence over open access. Figure 10 illustrates the number of requests fulfilled through Google Books, the Internet Archive, the Hathi Trust Digital Library, the digital collection of the Bibliothèque nationale de France (Gallica²), and the digital collection of the National Library of Russia.

2. Gallica

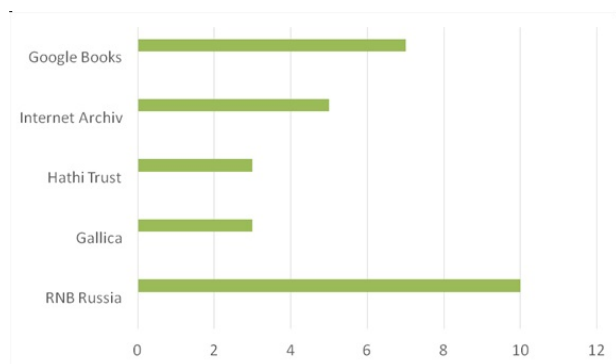


Figure 10. Lending of books from open access sources, 2020–2026.

Figure 11 illustrates lending activity for theses and dissertations for the period 2019–2026. A considerable number of theses and dissertations were obtained from open access sources, primarily through the Open Access Theses and Dissertation³ service, which provides access to approximately 2.5 million theses and dissertations, and the Networked Digital Library of Theses and Dissertation⁴ service, which holds records for over four million items. A portion of academic content and dissertations was also obtained through the Google Scholar platform.

Conference abstracts, presentations, protocols, reports, patents, and similar materials account for a significant proportion of the items requested through the lending service. Alongside conference websites, supply has been accomplished largely through the open access resources of the Essex Library⁵ and the All Academic⁶ archive and service — particularly through its Archive of Academic Materials (Figure 12).

With regard to the supply of scholarly journal articles, in addition to the widely used German SUBITO system, open access systems are increasingly being employed, including Cite Seer X⁷, arXiv⁸, and the digital collections of major world libraries such as Gallica (Figure 13).

3. [Open Access Theses and Dissertation](#)

4. [Networked Digital Library of Theses and Dissertation](#)

5. [Essex Library](#)

6. [All Academic](#)

7. [Cite Seer X](#)

8. [arXiv](#)

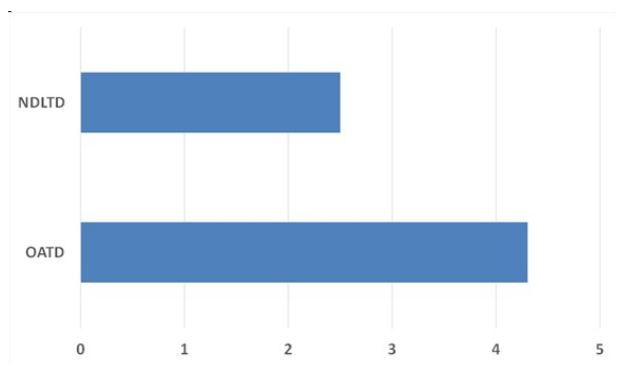


Figure 11. Lending of theses and dissertations from open access sources, 2019–2026.

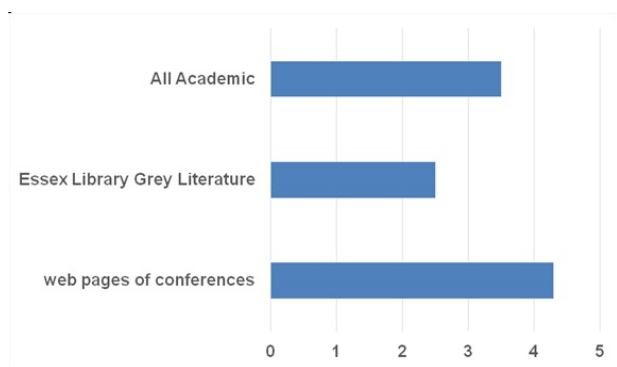


Figure 12. Supply of gray literature from open access sources, 2019–2026.

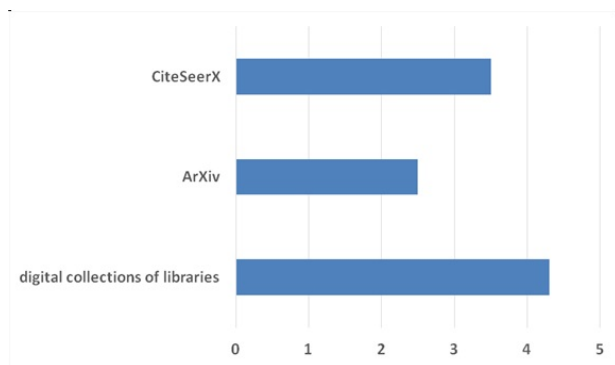


Figure 13. Supply of journal articles from open access sources, 2019–2026.

5 Conclusion

The changes affecting library and information activity in the twenty-first century, driven by digital transformation, are reflected in every segment of professional practice, including scientific documents supply and interlibrary loan. Open access and the development of open repositories covering publications across all scholarly disciplines have contributed to greater availability of materials and reduced financial costs. In addition, they have facilitated access to materials that were previously more difficult to obtain, such as “gray literature” and doctoral dissertations. Within the overall volume of lending, the share of scientific document supply from open access sources has recorded substantial growth over recent decades.

The University Library “Svetozar Marković” was among the first institutions in Serbia to integrate open repositories, open access, as well as portal and search engine queries and direct contact with authors, into the practice of interlibrary loan — a development that has been recognized in the international literature (Schöpfel 2014, 191). The Library’s notable experience in modernizing the activity, and the analysis of scholarly information organization within this particular economy of documents, necessarily involves, as the present overview demonstrates, a continuous examination not only of the operational efficiency of the activity and its management, but also of the opportunities this activity offers in advancing the broader space of free access to knowledge.

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