

Use of RMI in the Online Delivery of Text-based content:

Standards for the expression of publisher/library licenses

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EDItEUR

EDItEUR

- International umbrella body for book industry standards development
- Originally a European project (FEP, EBF, EBLIDA)
- Now international - members in 20 countries
- Libraries, booksellers/subscription agents/publishers
- Develops and maintains innovative standards (openly available at no cost): bib/product information (ONIX), EDI, RFID, Rights expression etc.
- Strong collaboration with national and international standards bodies (formal liaisons with ISO, NISO etc)
- Manages International ISBN Agency

What is ONIX?

- A family of XML formats for communicating rich metadata about books, serials and other published media, using common data elements
- Structured dictionary, code lists, XML Schemas, DTDs and user documentation
- Developed and maintained by EDItEUR through a growing number of partnerships with other organisations
- Well-structured on ontological principles
- Extensible, mappable, interoperable

ONIX for Books

- The first international trade standard for product information
- First release in 2000, Release 3 in 2008
- Adopted by book trades of Australia, Canada, Germany, Finland France, Italy, Korea, Netherlands, Norway, Russia, Spain, Sweden, UK, US
- A trade standard, but used by Library of Congress, Deutsche Bibliothek and others for collecting metadata from publishers and enhancing online public-access catalogues (OPACS)

ONIX for Serials

- An EDItEUR – NISO collaboration through a Joint Working Party (JWP)
- Being piloted as a series of messages to support exchanges of metadata between publishers, intermediary services and libraries
- A growing set of XML “building blocks” that can be combined in different ways to form messages for particular application needs
- Identified the need to express usage rights

Licensing terms - the problem

- Growth of digital collections in libraries
- Need to automate electronic resource management
- Variation in licence terms
 - What are library users permitted to do?
 - Under what conditions?
 - Which classes of users are permitted to do what?
 - What exceptions are there to what they are permitted to do?
- Licenses are, typically, negotiated then filed away
- How can libraries and users know what has been negotiated and avoid saying “no” just in case?

What libraries said they wanted

- Expression of rights
 - rights expressed in machine readable form
- Dissemination of rights
 - ensuring that whenever a resource is described its rights are also described
- Exposure of rights
 - user sees the rights information associated with a resource

Intrallect DRM report for JISC

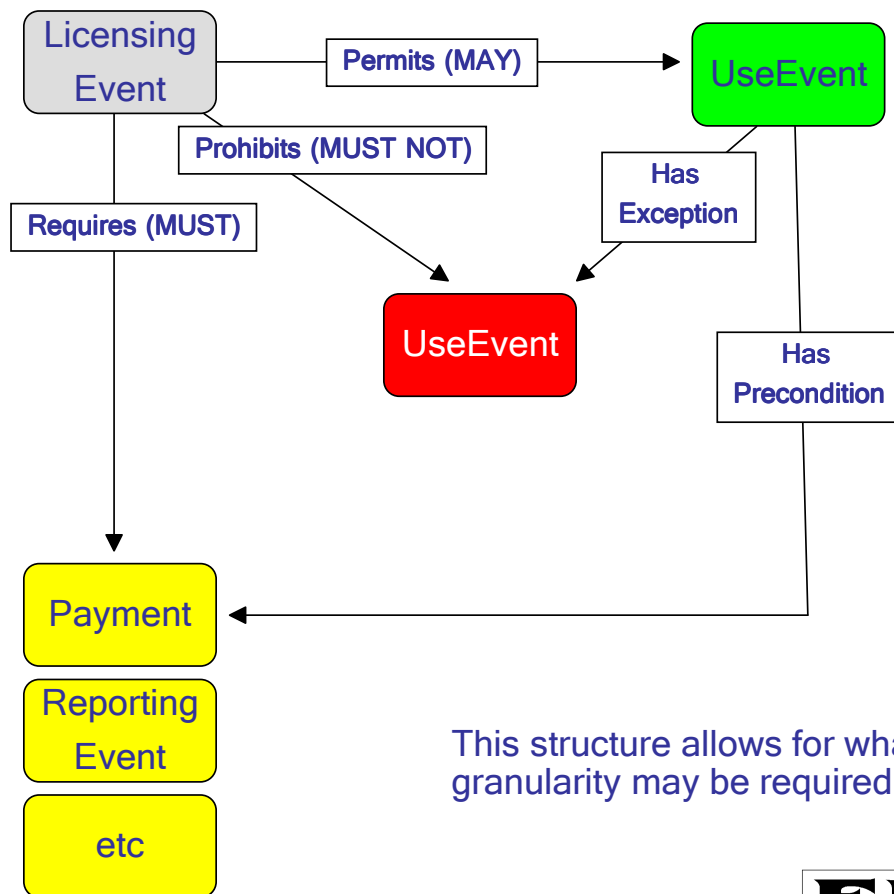
...in other words

- Machine-readable license terms loadable into libraries' electronic resource management (ERM) systems
- A standard mechanism for the communication of unambiguous licensing information within the library supply chain
- Compatible with other metadata standards
 - i.e. XML - based
 - using standard identifiers
- Flexible, extensible, interoperable
- an ONIX for Licensing Terms

ONIX for Licensing Terms (OLT)

- Some work on the encoding of licence terms was done as part of the US Electronic Resources Management Initiative (ERMI) in 2004, but this fell short of enabling a licence to be fully expressed
- EDItEUR undertook a proof of concept project in 2005, supported by the PLS (Publishers Licensing Society) and JISC (UK Higher Education Funding Council's Joint Information Systems Committee)
- Followed by the publication of a first draft of an ONIX format for Publications Licences based on <indec> rights model

Terms of a Licence as a group of Events



This structure allows for whatever level of flexibility or granularity may be required now or in the future.

ONIX for Licensing Terms (OLT)

- Takes into account the requirements of all stakeholders in the chain
- Provides for the full complexity of rights management requirements
 - Based on a logical events-based “rights model”
- Fully extensible
 - Able to support any future business model
 - Able to support multimedia rights management
- Designed to support interoperability
 - Can be mapped to other well structured metadata formats

Not a “Rights Expression Language”

- XrML / ODRL are designed to control rights “enforcement technologies” (i.e. technical protection)
- They don’t have the required flexibility
 - don’t express exceptions well
 - designed to have a one-to-one relationship to a resource
- Publishers are content to rely on compliance with licences in B2B relationships (e.g. with libraries)
- Our focus is entirely on the *communication* of usage terms (rights metadata), not technical protection

OLT and its potential applications

- OLT generally identified with publishers' licenses to academic libraries
- However, EDItEUR always conceived OLT as something that should be applicable to many types of licensor and licensee, many types of licensed content, and many types of usage
- There is, therefore, no single 'ONIX Licensing Terms' format
- OLT is a family of license-related formats with a shared underlying framework and structured data dictionary

OLT applications

- ONIX for Publications Licenses (ONIX-PL)
- Message formats for the International Federation of Reproduction Rights Organizations (IFRRO): *ONIX for Repertoire*, and *ONIX for Distributions*
- The Automated Content Access Protocol (ACAP) project is working with EDItEUR and OLT terms to express permissions for use of web content in a form that can be interpreted by search engine crawlers
- Others to come

ONIX-PL format

- Structured XML statements of all terms and conditions actionable in licensee's system
- Non-actionable terms and conditions are included as controlled "term type" references to the license text
 - This will facilitate a knowledge base of consistently classified non-actionable terms and conditions
- Repertoire of licensed materials will be specified by reference to a separate source
- Ability to express complete license
- JISC are currently mapping all their publisher licences (80) to ONIX-PL and will make them available to libraries

ONIX-PL Editing Tools (OPLE)

- Smaller publishers cannot be expected to draft XML versions of their licences
- JISC funded the specification of a drafting tool to enable publishers to produce ONIX-PL expressions of their licences, with input from publishers
- JISC and PLS (Publishers Licensing Society) co-funded development of ONIX-PL editing tool, OPLE
- No knowledge of XML required
- Open source – freely available to all

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