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 <indecs> 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
EDItEUR: ONIX for Licensing Terms
www.editeur.org

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