

## **ONIX for Licensing Terms: Electronic communication of usage terms between publishers and libraries**

### **1. What is it?**

ONIX for Licensing Terms is a family of ONIX XML formats for the communication of licensing terms for IP resources, and particularly for material published in electronic form.

The first manifestation of ONIX for Licensing Terms is an ONIX Publisher License format, intended to support the communication of licensing terms for electronic resources from a publisher to a user institution (e.g. an academic institution or consortium), either directly or through a subscription agent. The purpose is to enable the license terms to be loaded into an electronic resources management system maintained by the receiving institution.

The ONIX Publisher License format may also be used for the communication of licensing terms from a content host system to a user institution; and it should also be possible to extend it for the communication of licensing terms from a publisher to a content host system that carries the publisher's materials, and.

There is further potential for the ONIX Publisher License format to be used to communicate usage terms between publishers' digital repositories and search engines.

The ONIX Publisher License format will allow any publisher licence to be expressed electronically as a standard XML document. Development of the format is ongoing; and work-in-progress documentation can be found on the EDItEUR website at [http://www.editeur.org/onix\\_licensing.html](http://www.editeur.org/onix_licensing.html)

### **2. Who wants it and why?**

As the number of the digital resources in library collections continues to grow, libraries are having difficulty in complying with the widely differing licence terms applied to those resources by their creators and publishers. Simply being able to express these terms in a simple form and communicate them to users has become a pressing need.

As libraries have attempted to incorporate digital resources into their collections, services and operations, they have found that existing integrated library systems lack the required functionality to support the management of these resources.

A report by Intrallect for JISC included the following requirements from libraries:

- Rights should be expressed in machine readable form
- Whenever a resource is described its rights should also be described
- Users should be able to see the rights information associated with a resource

In the United States, the Digital Library Federation (DLF), a grouping of the major US academic research libraries, set up their Electronic Resource Management Initiative (ERMI) to aid the rapid development of library systems by providing a series of papers to help both to define requirements and to propose data standards for the management of electronic resources.

### **3. What's being done about it?**

EDItEUR, the global trade standards organisation for the book and journals sectors, has been exploring rights metadata standards since 1995, when a joint EDItEUR/NISO working party on rights metadata, chaired by Sally Morris, produced some initial guidelines and recommendations.

In 2004, EDItEUR commissioned an assessment of the ERMI work from the Rightscom consultancy to assess the extent to which it might provide a basis for standard XML formats that would take into account the requirements of all the stakeholders in the supply chain, provide for the full complexity of rights expression and be flexible enough to support any business model and all media types. The assessment paper concluded that the ERMI work was a good starting point for such work but would require further development in order to meet all these requirements.

A proof of concept project followed, with funding from the Publishers Licensing Society and the JISC, to explore the possibility of developing an ONIX for Licensing terms message. This in turn led to two further JISC projects managed by Book Industry Communication (BIC). The first was to develop the message standard by expressing a Wiley InterScience licence as an ONIX Publisher License message, in collaboration with Wiley and Cranfield University Library.

The second, in collaboration with ALPSP and Loughborough University, is to examine and specify the tools and services that would be required to help publishers produce ONIX Publisher License messages.

The work of EDItEUR in developing the ONIX Publisher License format is being monitored and guided by a Joint Working Party of DLF, NISO, PLS and EDItEUR, hosted by NISO, the US information standards body.

### **4. Why should publishers be interested?**

Publishers have a self-evident interest in helping libraries comply with the terms of their licences. Historically, the relationship between academic publishers and libraries has been based on trust and compliance with licences.

There could also be considerable management benefits to publishers in having their licences in electronic form, enabling them to more easily reference individual licences and, if they wish, develop automated rights and licence management systems

The design principles of the ONIX Publisher License format should allow it to be used generically as a means of communicating licensing terms between publishers and any licensed party.

Given the interest of the major academic libraries, JISC in the UK and the Digital Library Federation in the US, it is likely that major libraries and consortia will require licenses to be expressed in the standard XML format in due course.

## **5. How will publishers create ONIX Publisher License messages?**

As readers will see if they look at the ONIX Publisher License documentation on the EDItEUR website, the message appears very complex. This is inevitable if it is to be able to express the full complexity of a conventional written licence. However, only library management systems should need to deal with the full XML document. We believe that it will be possible to build a toolkit that will enable publishers to choose from, and where necessary extend, a menu of clauses and terms, and create an XML licence without needing to engage with the format on a technical level.

## **6. What next?**

ALPSP will be inviting a small number of member publishers to provide sample licences and to help BIC specify the tools and services that will enable them to express their licences as ONIX Publisher License XML messages. Those publishers will also be asked to be prepared to be visited for no more than a couple of hours by one of the project consultants, to talk through any issues on the licence and to understand their licensing process. Participating publishers will also be asked to take part, either one-to-one or in a small group, in a further discussion later in the project to discuss the proposals drafted by the project consultants.

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