JIBS/Eduserv Seminar June 16th 2010
School of Oriental and African Studies, London

On June 16th I attended a seminar about the future of licences which was really thought provoking. Over 80 delegates attended with the majority of people representing a University library.

As libraries evolve, we need to provide flexible access for our users who are using different mobile technologies to access our resources and as such we need flexible licences to enable that. These issues were highlighted throughout the day and discussed at length. Here is a resume of all the speakers' talks for those of you who couldn't attend.

JIBS Chair **Sue Cumberpatch** welcomed the audience and following the introduction of the day's events, enticed delegates to come to the next joint event which will be held in December. More details on our website soon!

Sarah Thompson, Acquisitions Librarian from York, chaired the day's seminar and introduced a packed programme from a mix of speakers from different backgrounds. She explained that with library budgets being restricted due to financial upheaval, libraries need to show how worthwhile their resources are.

The Keynote speaker was **Owen Stephens**, an independent consultant specialising in the use of IT in libraries and currently working on the TELSTAR project at the OU. Owen drew on his knowledge of Access and Identity Management (AIM) and licensing in the UK HE sector and gave a really thought provoking talk – no PowerPoint presentation here - just some visual aids to get us thinking about how users are changing how they access electronic resources. He asked whether physical location matters in the digital world. We know that people are more 'mobile' in their day to day life and he showed how the number of mobile devices in the world is increasing at a huge rate with more and more of them being smart phones. More and more students have a laptop and a huge number replace their phones every 18 months, so if a student doesn't have a smart phone today they will by the time they leave university. How far do our current licences meet the demands of mobile users? The JISC model licence is almost neutral on location though proxying is required where IP address is used to restrict access. Many resources will only allow access if a user is physically on campus. This is restrictive. More users are accessing internationally and model licences can be awkward about this. What about non-domicile users? As budgets tighten we need to be more realistic about what 'extras' we should pay for as the cost of supporting very remote users is very high. And as for Walk-in use, don't get Owen started on that one. These are the kind of issues that we are seeing more and more and publishers need to make their licences more flexible to respond to our users needs. We need to communicate more with publishers and negotiate our licences for the benefit of our community.

Next up was **Louise Cole** from Kingston University whose talk was entitled 'Thorny Issues in Licensing" and was a food for thought talk regarding licences from her own perspective but which we all could associate with. Louise defined licences and went on to describe the different types of users who are affected by licences and their restrictions. She explained in detail about partnerships between universities and colleges, franchised users and validated users and the problems that can occur for such students. Commercial partnerships, students on placement, alumni, walk-in users, distance learners and ex-members of staff all provide librarians with a

variety of complex issues. And that's not all. Wait till you see how different publishers define a 'site' or an 'authorised user'. Complex is an understatement. Louise explained that licences should be more user friendly, available in machine readable formats and contain less legalese. We are librarians not lawyers. In keeping the historical record Louise talked about issues regarding access in perpetuity and if licences are renegotiated which takes precedence? With a look to the future Louise envisaged that as universities compete for students, partnership arrangements will be the way forward, alumni and external members will require enhanced access especially with the shift from print to e, and to sum up asked us whether the virtual campus will one day become a reality?

Josephine Burt from the OU spoke next about the challenges of an expanding customer base and how the OU needs to adapt in the future. The OU is very different from most institutions as it isn't a very physical campus but a virtual one. The OU has 13 regional centres and offers over 570 modules available in the UK, Europe and worldwide. Courses can be paper-based, wholly online or a blend of the two, with 7500 associate lecturers and 200,000 registered students as well as 200,000 alumni. OU library services to students are fairly new as prior to the Mid 90s services were for teaching staff only. Josephine asked some interesting questions about the future of libraries come 2020. Will they exist or will we live in a Google world? What library activities will be important and what will we NOT be doing? What assets/features/skills do librarians need to focus on? And how do we add value to the student experience? The definition of a walk-in user invariably mentions the physical site but the OU needs something different, a virtual walk-in user maybe? The OU has some influence when negotiating a licence due to their large numbers of users and the location of course, but at a cost, naturally. It is hard to define a typical OU student and publishers need to understand all of the above to negotiate flexible licences in the future.

Jenny Carroll from Eduserv was the last speaker before lunch with a talk entitled 'It's all a question of scale- joint initiatives in HE institutions'. Eduserv's role is to negotiate site licences on behalf of HE. It should be simple but it isn't and Eduserv want to work out how they can help us when dealing with publishers. The grey areas mentioned in previous talks such as distance learners, walk-in users, franchise course, alumni etc make Universities complex and that in turn provides challenges when interpreting a licence. Eduserv carried out some research into specific concerns regarding the 'other permitted users' clause and the results were interesting. For example, 7% of students registered at UK University are overseas, 59% of which are distance learners, 55 on overseas campuses and 36 % under a collaborative provision. Some licences have a clause to say "no more than 5% of students can be overseas", which is too low! Jenny went on to talk about partnership agreements, collaborative courses and alumni, the kind of areas we as librarians need more clarity on from a publisher's licence agreement. Eduserv are beginning to get a better picture of what we need and will continue to gather information on our behalf. Eduserv would like to set up a Licensing Steering group to look at these matters in detail.

Matt Durant from Bath Spa gave an interesting talk about their experience regarding "OpenAthens LA 2.0 implementation". A bit technical for me but I think I got the gist of it. They wanted to improve access to all resources both internal and external, spend less time on administration and offer a single sign on for users. Matt gave on overview of the procedures involved to enable the transfer to OpenAthens with the support of Eduserv and gave those members of the audience who haven't gone down this road yet an insight into how it's done. Matt also showed that statistics can provide valuable information on the number of successful authentications, how popular (or not) a specific resource is and trends over time for access to resources.

With a promise not to make us fall asleep listening to a really boring subject, **Mark Bide** of EDiTEUR gave us an actually light hearted view of Machine Readable Licences (ONIX PL). EDiTEUR is a global trade standards organization for books and serials supply chains. ONIX for Publications Licenses (ONIX-PL) is intended to support the licensing of electronic resources to academic and corporate libraries. As the number of digital resources in library collections grows, libraries have increasing difficulty in managing, and ensuring compliance with, the correspondingly growing number of different licenses that they hold. ONIX-PL aims to enable libraries to express licenses in a machine-readable format, load them into electronic resource management systems, link them to digital resources and communicate key usage terms to users. "The problem with creating machine-readable licences is not with the mark-up but with understanding the licence in the first place"!

SAML Protected Resources – the theory and practice of granularity and management data by **Ed Dee** from EDINA. Ed explained that EDINA is a service provider of resources such as Digimap, Film & Sound Online but also an identity provider and supplier of federated access such as Shibboleth. His talk looked at what can be done with Security Assertion Markup Language (SAML) and how it provides a standard for exchanging authentication and authorisation information between an Identity Provider (IP) and a Service Provider (SP). He asked two relevant questions. What do people want to access and what do they want to do with them when they get access to them? Ed then explained the processes involved in an SAML exchange between IP and SP and the attributes required. He also provided some lovely diagrams and flowcharts to illustrate this to us.

The last presentation of the day was from **Martyn Jansen** from Eduserv entitled "Use, users and usage – where next for resource licensing?" His talk looked at the changes that may be required to alter the licensing environment to meet the demands of the challenges that have been discussed throughout the day. To meet those challenges licences need to be complete (need to cater for everyone), clear and simple (no jargon for us librarians), practical, consistent and future-proofed (to keep pace with an ever changing environment). Eduserv has been reviewing the current Chest licence terms as it had not been looked at in 10 years. They are aware of new user types and usages and as a result they aim to refine licence terms in the future and working towards the allowance for permanent archiving of resources. They discovered that publishers do not like clauses covering retired staff and ex-students. Walk-in users are accommodated but maybe we need to reconsider if they are part of our core community? The uptake of a standard licence would be greater without the walk-in clause! Maybe a "commercial pot" could be created where all these add-ons could be placed?

All in all a really interesting day which highlighted that fact that licences need to evolve to keep up with changing institutions, differing trends and more mobile users.

Catherine Parker, University of Huddersfield and JIBS Committee member

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