

MAKE IT AVAILABLE – EODOPEN, A PROJECT FOCUSING ON USER NEEDS

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ABSTRACT

Libraries in Europe have long been in dilemma on how to make available to users the significant number of textual resources from the 20th and 21st centuries which they are unable to publish digitally because of complex copyright legislations. The average user has no access to these works which are often lurking in the depths of library shelves, no longer commercially available, and for which the idea of reprinting or facsimile publication is not even an option.

In the EODOPEN project, fifteen libraries across Europe are working on how to bring digitally invisible, ‘hidden’ works, out of the depths of repositories and into the public domain. To achieve this goal, the project will work directly with different communities, both in the selection of the resources to be digitized and in the digitization itself, and in the presentation of the project results, while at the same time also contributing to the adequate management of rights clearance issues for library working groups. Moreover, the project will experiment with alternative service formats to bring digital content to the widest possible audience, with a focus on mobile devices and solutions for the blind and partially sighted users.

Introduction

The mission of libraries around the world has always been to collect and provide access to knowledge. This has not changed today, only the way and the circumstances of service are constantly changing and posing new challenges to content providers. It is, therefore, in the interest of libraries to provide this service with the fullest and most free access to our cultural heritage.

Libraries in Europe have long been concerned with the question of how to make available to users the significant number of textual resources which they are unable to publish digitally because of complex copyright legislations. The common user has no chance of accessing these works, which are often lurking in the depths of library shelves, not available on the market anymore, and for which the idea of reprinting or facsimile publication is out of sight.

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The tools of the digital world also provide countless opportunities for public collections to approach their challenges from a completely different perspective than before. In the field of application of innovations, this situation poses new responsibilities as well as new opportunities.

The *eBooks-On-Demand-Network Opening Publications for European Netizens* (EODOPEN) project aims to solve part of these problems. The project, initiated and coordinated by the University of Innsbruck, was launched in 2019 and was initially planned for 4 years, but due to the pandemic it has been extended till 2024. The Creative Europe-funded project involves 15 libraries in 11 countries from Europe (See Appendix for a list of the participating libraries).

History of EODOPEN

Although the EODOPEN project is only 2–3 years old, the cooperation between the partners involved goes back much earlier. The foundations for the objectives were already laid in 2008, and although the focus of the development was different, it involved the making of library resources digitally available in a user-friendly way. This initiative was the *E-books on Demand* (EoD).

The EoD project entails that, if a user orders a document digitization service from any of the cooperating libraries, after the copyright issues have been resolved, the digitized version will be made available to them and, after the payment of a service fee, they can take delivery of the digitized document. At the same time, a constantly expanding database of documents ordered in this way will be created and the participating libraries will be able to continue to provide the digitized version of the document.

This service has become very popular, as a large number of rights-cleared documents have become available in digital format to libraries and their users. The fifteen libraries participating in the project, seeing the success of the service, took the initiative to renew and further develop an efficient system.

In order to implement it, the second phase of eBooks on Demand was launched in 2019: the *eBooks On Demand Network Opening Publications for European Netizens* project called “EODOPEN”. Participants aim to expand the range of content available and provide an easy-to-use interface for disabled readers, as well as to develop software that provides effective support for rights management.

This is extremely important, as libraries have long been concerned about what to do with the significant amount of textual resources created in the 20th and 21st centuries that cannot be provided in digitized form due to complex copyright regulations.

Project goals

EODOPEN focuses on bringing digitally hidden volumes ranging from 20th and 21st century Europe to the forefront by directly involving communities in the selection, digitization and dissemination processes, while strengthening the capacity of the library staff to deal with issues appropriately. In addition, the project will extend the scope to alternative delivery formats to reach an even wider audience, especially formats suitable for users with smart mobile devices and for blind or partially sighted users.

To achieve this, the three main themes of the project activities are:

1. Digitizing and making available 20th and 21st century literary works to the wider European community, including grey and scientific literature. The project is committed to ensuring that the process of selection, digitization and dissemination of documents is carried out with the effective involvement of the community.

The joint interpretation and application of the copyright laws of the participating partners require special attention and a broad knowledge of the law, as rights must be clarified and the existing copyright laws must be fully respected. All this will be considered when digitizing the selected material and creating a common portal to display the results of the project.

2. Improving access to 20th and 21st century texts for blind and partially sighted users and younger audiences by providing librarians with the skills and know-how to create alternative formats.

This is because the current dominant delivery format for digitized literary works in libraries is not suitable for all users and uses. It is therefore necessary to evaluate current technical solutions and improve current workflows, to ensure the sustainable use of books available in alternative formats, considering established workflows and existing services, and to ensure that alternative formats are effectively available to the blind and visually impaired users and for mobile users.

3. Strengthening the capacity of library staff and other cultural heritage institutions to operate at regional, national and international levels to adequately address rights clearance issues, by providing librarians and other cultural workers with the skills and competences to clear the rights necessary to digitize and make available 20th and 21st century literary works, while fully abiding to the copyright law.

This requires providing librarians with a technical infrastructure that allows them to properly document their rights clearance activities. The project will produce and disseminate publications for all European libraries and cultural institutions to support librarians and other cultural workers outside the EODOPEN consortium in carrying out these activities.¹

Project tasks and organization

In order to successfully achieve these goals, a very strictly coordinated project organization will be required. Within the project organization, the participating partners form seven Working Groups (WG) carry out well-thought-out and logically interdependent tasks together. The project tasks can be divided into four major areas (Working Packages – WP). One or more working groups are responsible for the tasks of the four main areas.

Project management tasks are carried out by “*WG1 - Project and Consortium Management*”. Its tasks include liaising with project partners and the EACEA (Education, Audiovisual and Culture Executive Agency)²; monitoring the budget and the progress of the work program, as well as organizing and conducting meetings of the different project groups; and preparing project reports based on all that.

Communication and dissemination are the second main area, covered by “*WG2 - Audience development, communication and dissemination*”. This working group updates and evaluates the communication and audience development plan; facilitates dialogue on the selection of the material to be digitized; and promotes digitized content and project results, and disseminates best practices in rights management.

Quality assessment and quality control is an integral part of any well-functioning project. In the EODOPEN project, this is the task of “*WG3 - Evaluation and quality assurance*”. Quality assurance is present at all stages of the project and includes the finalization of the evaluation plan (*Figure 1*).

The fourth area of the project structure is the active implementation of the professional content of the project. This task is performed jointly by four working groups.

The development of guides and recommendations for appropriate delivery formats is the task of “*WG4 - Transport Formats for Digitized Materials for Special Needs*”. In addition, training materials are being compiled on delivery formats for library staff.

Rights management issues are addressed by two working groups. One is “*WG5 - Rights clearance assessment and support*”, which create knowledge bases for rights management, and organize preparatory and practical workshops to develop best practices for legal licensing.

The other is “*WG6 - Rights clearance documentation tool*”, which is responsible for defining the technical infrastructure requirements for the legally proper documentation of legal clearance activities and sets out the requirements for the implementation of the rights management documentation tool in other workflows and institutional / organizational environments related to legal clarification.

Digitized documents from partner libraries will be available to all on a common portal. “*WG7 - Digitizing and making available: Common portal*” is responsible for defining the requirements for the creation and sustainable operation of the portal and for its operation. The National Széchényi Library (NSZL) is the head of WG6.

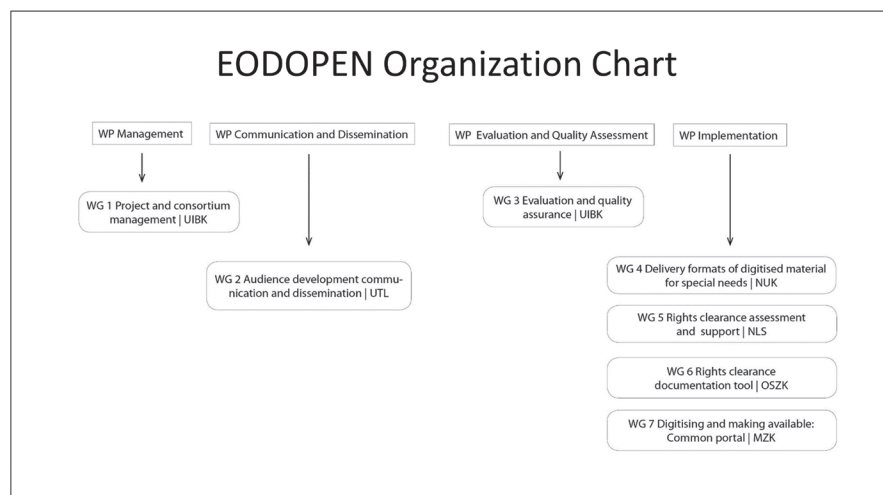


Figure 1. EODOPEN organization chart³

The role of the National Széchényi Library in the project

As head of the WG6, the National Széchényi Library is to design and develop a Rights Clearance Documentation Tool (RCDT) within working group 6 that simultaneously fits into the national library's own systems and considers the interoperability requirements of partner institutions.

The development process consists of the following three tasks:

1. Identifying the requirements of technical infrastructure for the legally appropriate documentation of rights clearance;
2. Specifying the requirements of implementation of the Rights Clearance Documentation Tool into other workflows and environments;
3. Implementing and testing the Rights Clearance Documentation Tool.

In preparation for the development required for the NSZL, a questionnaire was sent to project partners to identify the requirements. We asked them about the copyright clearance workflow used in their institution.

We also asked them about the legislative background of rights management and the data models to be implemented during the development of the Right Clearance Documentation Tool.

We also needed to clarify whether the system to be designed should include license management with its full documentation (including contracts and emails with right holders, etc.) and registering Creative Commons licenses and Open Access declarations too.

Some examples from the questionnaire sent out:

Table 1.
Excerpt from the questionnaire prepared by the NSZL⁴

Identifying requirements of technical infrastructure for legally appropriate documentation of rights clearance activities (M1-M14)	
<ul style="list-style-type: none"> The working group members will identify requirements for a tool for legally appropriate documentation of rights clearance activities (of all kinds) taking into account frame conditions such as national laws and current state-of-the-art interfaces and platforms and compile those in a specification paper. 	
I. Relevant laws	
1. title:*	
1. access URL:*	
2. title:	
2. access URL:	
Please provide details of those parts in the law which are considered to be relevant to right clearance workflow (e.g. list of sources of diligent search, mandatory procedures to find right holder, etc.).	
II. Workflow	
A. If you already have a workflow implemented or a workflow conception which complies with the relevant laws (i.e., covers all procedures and sources listed as requirements of copyright clearance/diligent search in the law), please provide details about it.	
B. If there is no workflow, please draft one.	
C. What do you expect to gain from WG6 as a result? (You can use draft workflow provided in <i>Appendix 1</i> as a reference.)	
III. Data elements to record in RCT	
....	
VII. Platform solution	
<i>What kind of resource management system (ILS/LSP) do you have? (E. g. cloud-based, national platform, etc.)</i>	
VIII. License management	
<i>Solutions to be developed should include license management?</i>	
	... setting permissions (e.g. by implementing DRM) by right holder?
	... forms for agreements?
	... documentation of whole procedure incl. attaching and preserving correspondences with right holders and signed agreements if applicable?
IX. Books in Print	
<i>Do you have a Books in Print service in your country? If yes, do you use it for copyright clearance, or do you plan to use it for that purpose?</i>	
....	

After summarizing and analyzing the responses provided by our project partners, they were incorporated into a joint workflow to document the clarification of copyright. This summary workflow analysis is an essential element of the specification being prepared.

The multipage questionnaire inquired about countless elements of legal clarification. There were parts that were quickly agreed upon by all partners, such as metadata elements or value dictionaries to be used in the documentation tool. And there were also details that were very difficult to incorporate into the workflow, as practices vary greatly from country to country. For example, the questionnaire included questions about the use and feasibility of *Books In-Print* databases, and it became clear from the responses that this service is not available in all countries, and that there are countless ways to implement it.

The development is very challenging for WG6, as the Right Clearance Documentation Tool has to take into account the practices of all partner institutions, which have been developed in the light of the legislation in the concerned country. This is why great attention has to be paid to the flexibility of the Documentation Tool; as, for example, the chronological analysis part has to take into account the different regulations on the publication date of works in different partner institutions, or, for example, the diversity of regulations on the publication date of works in licensing procedures or the date of death of the author, which affect the copyright licensing process in different countries in many different ways.

Participation in other working groups

Each partner library participates in the work of the other working groups (regardless of whether the library is a member of the WG or not). Thus, the Hungarian National Library also takes part in the work of the other WGs.

In case of management and dissemination tasks, the role of the partners is centrally managed and relatively uniform. The working group on financial tasks coordinates the work of the financial project managers of partner libraries. These are all essential tasks and provide a solid background for the professional work of the project. However, their tasks will not be discussed in detail in this study, rather the focus will be on the professional tasks of the project. Therefore, after the work of WG6, the tasks of WG4 is presented, as they are closely related to the professional project goals.

Special formats for the delivery of digitized material to meet specific needs are being developed by WG4 of the EODOPEN project. The compilation of the recommendation is based on two surveys. The first was carried out among the participating EODOPEN project partners and the second among the users of the EODOPEN partner libraries.

The aim of the first survey was to gain insight into the user experience of eBook readers, while the aim of the second survey was to access and understand the needs of blind and partially sighted e-book users. In addition to identifying the user experience of reading e-books, the surveys were designed to provide an overview of the positive and negative features of e-books, usage on different mobile devices, and e-book file formats. Some examples from the questions posted by WG4:

Table 2.

*Excerpt from WG4 Questionnaires on e-book reading habits for the blind and partially sighted*⁵

<p>How do you usually access e-books?</p> <ul style="list-style-type: none"> I borrow/download them in the library. I access them online through digital libraries (library digital collections, EBSCO, ProQuest etc.). I buy them online (Amazon, iBookstore, Google Books, and other e-bookstores). I download them through illegal sources (Pirate Bay, etc.). Other:
<p>How do you use e-books (more options are possible)?</p> <ul style="list-style-type: none"> I read them online. I download them and read offline. I print out selected pages. I print out the whole content. I use “print screen” button. Other:
<p>What are your common e-book reading practices? [always, usually, often, sometimes, never]</p> <ul style="list-style-type: none"> I read from start to end. I read the first few pages. I skim-read beginnings of chapters. I read the chapter/pages I am interested in. I only search for the specific information I need. I read only the abstract. Other (define):
<p>When browsing e-books before reading them, what are you paying attention to (more options are possible)?</p> <ul style="list-style-type: none"> Structure of the e-book. Navigation system. Responsive design (adjustment of the text to the screen size). Pagination. Basic overview of content for later borrowing of printed book. Usually I do not browse e-books.
<p>What features of e-books do you usually use? [always, usually, often, sometimes, never]</p> <ul style="list-style-type: none"> Full text search. Table of content. Index. References. Download. Copy & paste. Taking notes. Highlights. Bookmarks. Browsing and zooming. Using internal and external cross-links. Personalization of interface (adjusting the text size, colour of the background). Multimedia functionalities (video, audio, animation, etc.).
<p>By using the scale from 1-5 (5 meaning excellent), assess the following features of e-books:</p>

Guidelines have been developed because most delivery formats are difficult to access for mobile users and are inaccessible to blind and partially sighted users due to digitization. The guidelines are aimed at organizations in the cultural sector that digitize their cultural heritage materials and care about the document access needs of the wider blind and partially sighted community.

The guidelines describe the digitization workflows used in most EODOPEN partner institutions, suggest optimal delivery formats, describe the procedures for creating EPUB publications, and provide compatibility between mobile devices, file formats, and applications.

Below, I would like to mention very briefly the work of two more working groups, because we have close cooperation with both of them within the project.

One is WG5 with which the NSZL has the closest cooperation. Their task is to build up an internal knowledge database for rights clearance by undertaking a review and assessment of current nation-specific Intellectual Property Rights limitations.

To this end, preparatory workshops will be organized to gather best practices in order to build a usable knowledge base.

The other group is WG7 which coordinates the digitalization during the project. They are the ones who receive and host the digitized documents of our national library's EODOPEN project in an accessible interface that they design, operate, and maintain.

Summary

As the above-mentioned activities show, the EODOPEN project is an initiative that is truly focused on meeting the demands of users by making available digitally hidden European documents from the 20th and 21st centuries. To this end, the involvement of users in the selection of documents is included in the project processes from the very beginning, to ensure that the documents in this collection will be those that are on demand from readers, using an interface that is easy to handle by blind and partially sighted readers, and are compatible with mobile devices.

To achieve this, it is essential that copyright issues are properly clarified and that the process of rights clearance is supported by the documentation tools. This very complex and coordinated work has resulted in numerous rights clearance documents that are available to a large number of users in a way that meets their needs.

Appendix

Czech Academy of Sciences Library – Czech Republic
Moravian Library – Czech Republic
National and University Library – Slovenia
National Library of Estonia – Estonia
National Library of Portugal – Portugal

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National Library of Sweden – Sweden
National Széchényi Library – Hungary
Nicolaus Copernicus University in Torun – Poland
Research Library Olomouc – Czech Republic
Slovak Center of Scientific and Technical Information – Slovakia
University of Greifswald – Germany
University of Innsbruck – Austria
University of Regensburg – Germany
University of Tartu – Estonia
University of Vilnius – Lithuania

Notes and bibliography

1. EODOPEN Project. Source: <https://eodopen.eu/about> [20 February 2022.]
2. EACEA - Education, Audiovisual and Culture Executive Agency, the European Commission's Education, Audiovisual and Culture Executive Agency, which manages funding in the fields of education, culture, audiovisual media, sport, civic participation and volunteering.
3. Prepared by the author using Gstrein, Silvia: Eodopen, Eodopen Project meeting, Torun, 18.11.2019.
4. The questionnaire was made by Szabolcs Dancs and Rita Radó in 2019.
5. Questionnaire for e-book readers and Questionnaire for blind and partially sighted e-book readers - You can read more about the results of the questionnaires here: <https://eodopen.eu/news/7> [20 February 2022.]

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