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INTERNATIONAL FEDERATION OF REPRODUCTION RIGHTS ORGANISATIONS

Results of the
Second NTC Digital Survey
IFRRO's New Technologies Committee, October 1999

Data Analysis of IFRRO Survey

Introduction

This paper is the data summary as outlined in the previous data analysis report. Additional information can be found in the raw data (Access Database) and some collation work (Excel spreadsheet). These have been used to compile the tables in this document.

Data Handling

All the raw data is in an Access 97 database (ifrro database) and this is used to generate a number of data queries. This material is linked into an Excel spreadsheet where the data is collated into the originally requested format for organising the data by sector; Education, Pharmaceutical and Other. Because of the small sample size for the Pharmaceutical sector the

data is actually presented for the Private and Public sector classifications instead. This is also included in the Excel spreadsheet. The Private sector is made up of the categories, Pharmaceutical, Industrial, Corporate, Legal and Financial. The Public sector is taken to be the Education and Public categories.

The tables are simple counts and percentages of the total number of respondents as outlined in the previous document on data analysis.

Data Analysis

Reference Number
The reference number has two elements, the RRO identifier and the individual identifier. This was not used in the data analysis.

Organisation
No further analysis.

Job title
No further analysis.

Size of Organisation
The following table identifies the size of the organisations involved in the survey.

Number of respondents in each sector for different size organisations			
	Sector		
Size	Private	Public	Total
1	0	1	1
2-10	0	4	4
11-50	2	1	3
51-750	5	20	25
751 >	11	12	23

Generally, speaking the survey was responded to by large organisations. These are the organisations most likely to have someone who has responsibility for IPR and copyright matters.

Sector

The breakdown of the sector information is given below for the categories available to respondents and for the new private and public sector classifications.

Number of respondents in each sector	
Sector	**number**
Educational/Academic	29
Pharmaceutical/Chemical	9
Financial Services	2
Industrial	4
Third Party	0
Corporate/Commercial	3
Public	9
Legal	1
Total	**57**
Private	*19*
Public	*38*

No Trusted Third Party completed the questionnaire. This is probably because of the focus of the data collection. However, for comparative purposes a small-scale survey of the RRO's as to their attitudes to the development of electronic rights management might be appropriate. This would complement the private and public categories.

Territory

The following table will be produced for the territory the respondents work in.

Number of respondents in each territory by Sector			
	Sector		
Territory	**Private**	**Public**	**Total**
North America	16	13	29
C and Sth America	12	3	15
Asia Pacific	14	9	23
European Union	16	15	31
Other European	11	4	15

Africa	8	4	12
Middle East	10	1	11
Total	87	49	136
Areas per organisation	4.58	1.29	

The respondents were asked to identify <u>all</u> of the areas where they operate. The private sector companies were predominately international companies and operated in a number of areas. The public sector organisations tended to operate in a single area. This is also reflected in the sizes of the organisations involved in the survey. The majority are large organisations, particularly in the private sector.

Respondents Work - General

There are a number of questions asking about what the respondents does and this generated a table of percentages of who replied 'yes' to each of these questions. These questions are asked in two separate blocks, the first of which are in the table below.

Percentage of respondents general working activities by sector			
	Sector		
Respondents Work	Private	Public	Average
Do you have access to a network within your organization?	100.00%	97.37%	98.25%
Do you access to the Internet?	100.00%	97.37%	98.25%
Do you an e-mail address?	100.00%	97.37%	98.25%
Do you already download material that requires rights clearance?	42.11%	36.84%	38.60%
Do you personally scan documents for use or storage in digital form?	0.00%	23.68%	15.79%

The results do indicate that the respondents are computer literate and operating networked systems (e-mail, internet) on a daily basis, which was expected. This is important in the context of familiarity with systems that would be used in implementing electronic rights management systems.

A comparison of those who already download material, with those who do not, might be interesting.

Actions on copyright clearance

The information on the activities in relation to copyright clearance can be used to produce the following table. This will give some indication of what existing activities are being carried out.

Percentage of respondents carrying out specific actions in relation to copyright material			
	Sector		
Copyright Actions	Private	Public	Average
Viewing/ Browsing material	68.75%	93.10%	80.85%
Referencing/Archiving	56.25%	51.72%	51.06%
Scanning (Digitizing) material	31.25%	34.48%	31.91%
Making paper copies (photocopies)	62.50%	93.10%	78.72%
Adding Value by modifying, combining or some other creative process	31.25%	34.48%	31.91%

Note:

These figures are based on the percentage of respondents who responded to one or more of this group of questions. Non-responses were identified only if all of this group of questions was ignored by the respondent. There was non-response rate of 18% to this set of questions, and further investigation might be appropriate to identify why. For example, the questions might not be appropriate for certain management respondents and an analysis of the job titles might reveal this (expect Director or Senior grades to pre-dominate). If the non-responses are removed from the total figures then the table gives the following results.

Type of Material

The data for the types of material will be used to generate the following table.

Percentage of respondents working with different materials by sector			
	Sector		
Types of Material	Private	Public	Average
Text (books, journals, magazines)	100.00%	97.14%	98.04%
Images (photographs, diagrams, pictures)	37.50%	82.86%	68.63%
Maps	12.50%	37.14%	29.41%
Audio (music, sound recordings)	0.00%	11.43%	7.84%
Sheet Music/Musical scores	0.00%	11.43%	7.84%
Video	25.00%	17.14%	19.61%
Multimedia	25.00%	22.86%	23.53%

Non-responses are not included in the totals used for the percentages.

Respondents work - copyright materials

There are a number of questions asking about what the respondents and one section of the questionnaire deals with work in relation to copyright materials. Simple percentages of the number of respondents involved in these activities will be calculated for each of the sectors.

Percentage of respondents carrying out copyright clearance activities by sector			
	Sector		
Respondents Work	**Private**	**Public**	**Average**
Are you involved in clearing material for your organisation?	52.63%	44.74%	47.37%
Do you use material that requires copyright clearance?	73.68%	73.68%	73.68%

Frequency of Use

The material on the frequency with which copyright material is used was separated, as with the other material, using the Public and Private sector classification. There are five statements for which frequency information is asked.

1. Use material for distribution within the organization in paper form

Percentage frequency of use of copyright material by sector			
	Sector		
Frequency of Use	**Private**	**Public**	**Average**
Frequently	31.58%	34.21%	33.33%
Occasionally	31.58%	13.16%	19.30%
Rarely	21.05%	28.95%	26.32%
Not Applicable	10.53%	10.53%	10.53%

2. Use material for distribution within the organization in digital form (e-mail, bulletin boards, web pages)

Percentage frequency of use of copyright material by sector			
	Sector		
Frequency of Use	**Private**	**Public**	**Average**
Frequently	31.58%	34.21%	33.33%
Occasionally	31.58%	13.16%	19.30%
Rarely	21.05%	28.95%	26.32%

Not Applicable	10.53%	10.53%	10.53%

3. Use material for distribution outside the organization in paper form

Percentage frequency of use of copyright material by sector			
	Sector		
Frequency of Use	**Private**	**Public**	**Average**
Frequently	10.53%	10.53%	10.53%
Occasionally	21.05%	21.05%	21.05%
Rarely	26.32%	15.79%	19.30%
Not Applicable	36.84%	36.84%	36.84%

4. Use material for distribution outside the organization in digital form (e-mail, bulletin boards, web pages)

Percentage frequency of use of copyright material by sector			
	Sector		
Frequency of Use	**Private**	**Public**	**Average**
Frequently	10.53%	10.53%	10.53%
Occasionally	21.05%	21.05%	21.05%
Rarely	26.32%	15.79%	19.30%
Not Applicable	36.84%	36.84%	36.84%

5. Use material for distribution via Extranet

Percentage frequency of use of copyright material by sector			
	Sector		
Frequency of Use	**Private**	**Public**	**Average**
Frequently	5.26%	0.00%	1.75%
Occasionally	5.26%	10.53%	8.77%
Rarely	10.53%	23.68%	19.30%
Not Applicable	68.42%	50.00%	56.14%

Copyright material appears to be used more frequently for internal use within an organisation then externally.

Archiving

One of the questions looks at how materials are archived and this will result with the following table being generated.

Percentage for methods of archiving by sector			
	Sector		
Methods of Archiving	**Private**	**Public**	**Average**
Centrally in digital form or on-line across the company network	5.26%	5.26%	5.26%
Centrally in paper form	26.32%	13.16%	17.54%
Various places in digital form (backup storage, CD-ROMS, floppy disk)	0.00%	5.26%	3.51%
Various places in paper form	0.00%	5.26%	3.51%
Combination of above methods	36.84%	28.95%	31.58%
No archive required	10.53%	31.58%	24.56%

Payment

The methods of payments will be presented using the following table.

Percentage for methods of payment by sector			
	Sector		
Payment Mechanisms	**Private**	**Public**	**Average**
Subscription (Annual/Monthly)	36.84%	42.11%	40.35%
Per Transaction	26.32%	31.58%	29.82%
No Payment	0.00%	2.63%	1.75%
More than one of the above	26.32%	10.53%	15.79%

Subscription methods do seem to be the preferred method of payment at the moment.

Organisational Features

A set of questions relating to features of the organisation the individual works for was included in the questionnaire. Respondents, where possible had to identify where a feature was true for their organisation. Because there is a possibility that the individual may be uncertain about aspects of the organization an option was provided for them to check if they did not know the answer. The percentages are based on the total sample size.

1. My organization's network/intranet is password protected.

	Sector

	Private	Public	Average
True	63.16%	78.95%	73.68%
False	0.00%	5.26%	3.51%
Don't know	26.32%	10.53%	15.79%

2. The organization's network/intranet is limited to one country.

	Sector		
	Private	Public	Average
True	15.79%	50.00%	38.60%
False	63.16%	23.68%	36.84%
Don't know	10.53%	15.79%	14.04%

The difference between the private and public sector in terms of international nature of the organisation has already been considered.

3. E-mail is used throughout the organization on a daily or almost daily basis.

	Sector		
	Private	Public	Average
True	89.47%	89.47%	89.47%
False	5.26%	5.26%	5.26%
Don't know	0.00%	0.00%	0.00%

This confirms the earlier finding about access to e-mail and regular use of systems.

4. The organization has a scanning service (for internal use).

	Sector		
	Private	Public	Average
True	47.37%	55.26%	52.63%
False	15.79%	23.68%	21.05%
Don't know	26.32%	10.53%	15.79%

5. A centralized information service or library facility is available within my organization.

	Sector		
	Private	Public	Average
True	73.68%	86.84%	82.46%

False	10.53%	10.53%	10.53%
Don't know	5.26%	0.00%	1.75%

In the public sector a number of organisations were libraries, including university libraries.

6. My organization is currently required to file documents electronically with one or more governmental agencies.

	Sector		
	Private	**Public**	**Average**
True	36.84%	31.58%	33.33%
False	26.32%	26.32%	26.32%
Don't know	26.32%	31.58%	29.82%

7. It is possible for my organization to restrict access to the organization's internal network country by country.

	Sector		
	Private	**Public**	**Average**
True	26.32%	28.95%	28.07%
False	10.53%	18.42%	15.79%
Don't know	47.37%	39.47%	42.11%

Views and Expectation

In the tables below, for reference purposes all values greater than 60% are highlighted and all values below 10% are in bold. There is no statistical significance in these cut-off points but it does draw attention to where there are high or low values in the results.

1. My organization is interested in a service that allowed you to download on demand digital material protected by copyright.

	Sector		
	Private	**Public**	**Average**
Agree	84.21%	84.21%	84.21%
Disagree	**0.00%**	**0.00%**	**0.00%**
Neither agree nor disagree	10.53%	13.16%	12.28%

No one disagrees with this statement.

2. Rightsholders are unlikely to make their content available digitally for fear of infringement of rights and illegal reuse of material.

	Sector		
	Private	**Public**	**Average**
Agree	36.84%	36.84%	36.84%
Disagree	21.05%	21.05%	21.05%
Neither agree nor disagree	31.58%	42.11%	38.60%

Some degree of uncertainty or ambiguity about this but both the public and private sector have a similar view. Both however, are users and not rightsholders. Rightsholders may have a different perspective.

3. The momentum for electronic services means that digital rights management services are inevitable.

	Sector		
	Private	**Public**	**Average**
Agree	63.16%	65.79%	64.91%
Disagree	**0.00%**	**7.89%**	**5.26%**
Neither agree nor disagree	31.58%	26.32%	28.07%

It looks like there is a degree of agreement that electronic services are going to happen. There is very little disagreement.

4. If material and rights could be obtained over the Internet then payment per item would best suit the requirements of my organization.

	Sector		
	Private	**Public**	**Average**
Agree	36.84%	34.21%	35.09%
Disagree	36.84%	31.58%	33.33%
Neither agree nor disagree	21.05%	31.58%	28.07%

Ambiguous

5. To make it easier for my organization rightsholders should look at ways of collectively allowing rights to be cleared electronically.

	Sector		
	Private	**Public**	**Average**
Agree	89.47%	78.95%	82.46%

Disagree	**0.00%**	**0.00%**	**0.00%**
Neither agree nor disagree	**5.26%**	21.05%	15.79%

No one disagrees with this statement. The onus would appear to be on the rightsholders.

6. A one-stop-shop for digital rights clearance is the best solution for my business.

	Sector		
	Private	**Public**	**Average**
Agree	57.89%	52.63%	54.39%
Disagree	10.53%	**7.89%**	**8.77%**
Neither agree nor disagree	26.32%	36.84%	33.33%

Some support for a one-stop-shop.

7. My organization is interested in a service which allowed you to clear rights on a per item basis over the Internet.

	Sector		
	Private	**Public**	**Average**
Agree	42.11%	39.47%	40.35%
Disagree	36.84%	23.68%	28.07%
Neither agree nor disagree	15.59%	34.21%	28.07%

Per item clearance (7) is not as popular as site licenses (16) and subscription (24). This may reflect what is familiar and this might be explored further. That is do those who already use one method of payment see the future as that method of payment.

8. Training users to use a new service is likely to be a problem in the take up of digital rights management services.

	Sector		
	Private	**Public**	**Average**
Agree	36.84%	31.58%	33.33%
Disagree	31.58%	44.74%	40.35%
Neither agree nor disagree	21.05%	21.05%	21.05%

Ambiguous

9. My organization expects to be required to file documents electronically with one or more governmental agency within 2 to 3 years.

	Sector		
	Private	Public	Average
Agree	36.84%	50.00%	45.61%
Disagree	21.05%	**5.26%**	10.53%
Neither agree nor disagree	31.58%	44.74%	40.35%

Difference between the public sector and the private.

10. It should be easy to devise a system, with standard terms and conditions of use and reuse that is acceptable both to rightsholders and end users.

	Sector		
	Private	Public	Average
Agree	47.37%	55.26%	52.63%
Disagree	21.05%	13.16%	15.79%
Neither agree nor disagree	21.05%	28.95%	26.32%

This is reassuring because with standard terms and conditions automatic on-line licensing is going to be difficult to envisage.

11. Some mechanism is required that controls access to digital services so that only authorized users are able to download material or clear rights items.

	Sector		
	Private	Public	Average
Agree	42.11%	81.58%	68.42%
Disagree	15.79%	**0.00%**	**5.26%**
Neither agree nor disagree	26.32%	18.42%	21.05%

Difference for public and private sector for this question.

12. An online (Web-based) rights management service would lead to a quicker clearance of rights.

	Sector		
	Private	Public	Average
Agree	68.42%	65.79%	66.67%
Disagree	**0.00%**	**0.00%**	**0.00%**
Neither agree nor disagree	21.05%	34.21%	29.82%

No one disagrees with this statement.

13. Ready access across the whole of the corporate network (even worldwide) is required for ease of download and rights management.

	Sector		
	Private	**Public**	**Average**
Agree	47.37%	42.11%	43.86%
Disagree	**5.26%**	**7.89%%**	**7.02%**
Neither agree nor disagree	36.84%	47.37%	43.86%

14. Electronic rights management will only happen if collective agreements are in place to make it easy to use.

	Sector		
	Private	**Public**	**Average**
Agree	68.42%	71.05%	70.18%
Disagree	**5.26%**	**5.26%**	**5.26%**
Neither agree nor disagree	15.79%	23.68%	21.05%

Onus is on collective agreements (5).

15. Access controls (individual accounts, password protection) will be maintained and managed by an external rights management service provider.

	Sector		
	Private	**Public**	**Average**
Agree	31.58%	47.37%	42.11%
Disagree	10.53%	13.16%	12.28%
Neither agree nor disagree	47.37%	39.47%	42.11%

Differences between public and private sector.

16. My organization would prefer a site license (for all users within an IP address) to a license where each individual user must be identified.

	Sector		
	Private	**Public**	**Average**
Agree	57.89%	71.05%	66.67%
Disagree	15.79%	**0.00%**	**0.00%**
Neither agree nor disagree	15.79%	26.32%	22.81%

Differences between public and private sector. Preference over per item payment ([7](#)).

17. Giving an external rights management service provider details of authorized users is a problem for my organization.

	Sector		
	Private	**Public**	**Average**
Agree	47.37%	42.11%	43.86%
Disagree	21.05%	10.53%	14.04%
Neither agree nor disagree	21.05%	44.74%	36.84%

External rights management service provider ([17](#)) are preferred to publishers ([23](#)) and trusted third parties ([25](#)).

18. The external rights management service provider will be responsible for managing the accounting and billing for all transactions.

	Sector		
	Private	**Public**	**Average**
Agree	47.37%	44.74%	45.61%
Disagree	**5.26%**	13.16%	10.53%
Neither agree nor disagree	36.84%	39.47%	38.60%

Low level of disagreement but rather uncertain otherwise.

19. A system that identifies and invisibly watermarks material so that each item and transaction can be traced is not a problem for my organization.

	Sector		
	Private	**Public**	**Average**
Agree	26.32%	28.95%	28.07%
Disagree	15.79%	10.53%	12.28%
Neither agree nor disagree	47.37%	57.89%	54.39%

Technology questions seemed to have a high level of response where there is neither agreement nor disagreement.

20. If the only way to obtain a license was to identify each person within the organization authorized to use the network, we would be willing to do so.

	Sector		
	Private	**Public**	**Average**

Agree	21.05%	39.47%	33.33%
Disagree	31.58%	15.79%	21.05%
Neither agree nor disagree	36.84%	39.47%	38.60%

Difference between public and private sectors.

21. An automated digital rights management service will cost my business less than traditional methods.

	Sector		
	Private	**Public**	**Average**
Agree	26.32%	15.79%	19.30%
Disagree	10.53%	**5.26%**	**7.02%**
Neither agree nor disagree	52.63%	76.32%	68.42%

Costs of any new services are uncertain. It may be quicker (12) but not necessarily cheaper.

22. Infrequent users should be able to log-on on a casual basis to obtain material on a pay per item basis.

	Sector		
	Private	**Public**	**Average**
Agree	63.16%	65.79%	64.91%
Disagree	10.53%	10.53%	10.53%
Neither agree nor disagree	15.79%	23.68%	21.05%

23. Giving a publisher details of authorized users is a problem for my organization.

	Sector		
	Private	**Public**	**Average**
Agree	31.58%	36.84%	35.09%
Disagree	15.79%	15.79%	15.79%
Neither agree nor disagree	36.84%	44.74%	42.11%

External rights management service provider (17) are preferred to publishers (23) and trusted third parties (25).

24. My organization is interested in a service to pay an annual fee to obtain the rights to any material from a repertory of works to use internally.

	Sector

	Private	Public	Average
Agree	73.68%	52.63%	59.65%
Disagree	**0.00%**	10.53%	**7.02%**
Neither agree nor disagree	15.79%	31.58%	26.32%

Difference between public and private sectors

25. Giving a trusted third party (clearinghouse) details of authorized users is a problem for my organization.

	Sector		
	Private	Public	Average
Agree	21.05%	23.68%	22.81%
Disagree	15.79%	21.05%	19.30%
Neither agree nor disagree	52.63%	52.63%	52.63%

External rights management service provider (17) are preferred to publishers (23) and trusted third parties (25).

26. Would your organisation be prepared to work with a number of individual rightsholders for a per transaction fee, if this was the only way to clear rights digitally.

	Sector		
	Private	Public	Average
Agree	42.11%	42.11%	42.11%
Disagree	26.32%	28.95%	28.07%
Neither agree nor disagree	21.05%	26.32%	24.56%

27. Encryption technology, where payment for rights would be in return for a software key to decrypt the material would be acceptable to my organization if it allowed all employees within the organization to access the material.

	Sector		
	Private	Public	Average
Agree	21.05%	47.37%	38.60%
Disagree	26.32%	15.79%	19.30%
Neither agree nor disagree	42.11%	34.21%	36.84%

Technology questions seemed to have a high level of response where there is neither agreement nor disagreement.

28. Encryption technology as above would be acceptable to my organization even if it only allowed specific employees within the organization to access the material.

	Sector		
	Private	Public	Average
Agree	26.32%	28.95%	28.07%
Disagree	26.32%	31.58%	29.82%
Neither agree nor disagree	36.84%	36.84%	36.84%

Technology questions seemed to have a high level of response where there is neither agreement nor disagreement.

General

The same conclusions can be drawn as for the recent Imprimatur Services Ltd Consensus Forum on Licensing report in response to a different set of agree/disagree questions.

> "Overall, what is of interest is the level of uncertainty that still prevails about the future development of electronic on-line licensing. For a number of questions the neither agree or disagree option was most common response. The uncertainty related to the details of implementation, how and who; although there was general agreement of what will happen; electronic on-line licensing. What the results might indicate is the view expressed at the forum that the forum was the beginning of a process where the outcomes were identified but the means for achieving these outcomes have not yet been thought through and developed."

There is an interest in an on-line service (1), which are seen as inevitable (3) and will lead to quicker (12) service. A one-stop-shop would be a good solution (6) and subscription (24) and site licenses (16) seems to be preferred to a per item (4, 7) service.

There is some uncertainty about the attitudes of rightsholders (2), to training (8), government requirements (9), billing (18), cost (21) and technology (19, 27, 28). There is also some ambiguity about access issues 11, 13, 15, 20, 22. The results in relation to giving information to external service provider (17), publishers (23) and Trusted Third Parties are difficult to interpret because the later seems to be the least trusted!

There is some agreement that the onus falls on rightsholders and collective agreements to provide a solution (5, 14) and it should be possible to provide a service on the basis of standard terms (10). However, any electronic service might be acceptable (26).