Copyright and Funders Mandates
RoMEO & JULIET
SHERPA Plus – St Andrews

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RoMEO

- **Publisher numbers** (265 listed on 26/03/07)
- **Search formats**
  - ISSN
  - Journal
  - Publisher

RoMEO Colour Scheme

- Highlights publisher’s archiving policies

<table>
<thead>
<tr>
<th>Colour</th>
<th>Archiving Policy</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Green</strong></td>
<td>(38%) Can archive both pre &amp; post-prints</td>
</tr>
<tr>
<td><strong>Blue</strong></td>
<td>(25%) Can archive post-print only</td>
</tr>
<tr>
<td><strong>Yellow</strong></td>
<td>(10%) Can archive pre-print only</td>
</tr>
<tr>
<td><strong>White</strong></td>
<td>(27%) Archiving not formally supported</td>
</tr>
</tbody>
</table>

• Prohibitive restrictions reduce colour level
Conditions & Restrictions

- Two forms of policy rule amendments
  - **Conditions**
    - Can be easily accommodated
    - Do not hinder author archiving
      - E.g. Publisher copyright & source must be acknowledged
  - **Restrictions**
    - Are more prohibitive
    - Require additional actions from author
    - May block public access to eprints
      - E.g. 4 year embargo on deposition

Maintaining RoMEO

- **Publishers & Journals**
  - Information supplied by the British Library & Zetoc
  - Not all publishers as of yet included on RoMEO
- **New suggestions or updates**
  - Globally from publishers, academics, librarians or public
  - Generally email contact via online form
  - Number of regular contributors
  - Some publishers unknown by the BL
- **All suggestions & updates manually examined**
  - Ensures elimination of spam
  - Quality assures provided service information
  - Allows for bespoke response to each

Simplified Procedure

1. **Locate publisher’s Web site**
   - Ensure scholarly publications
2. **Find publisher’s copyright transfer agreement (CTA)**
   - Generally under information for authors
   - May vary between different journals from same publisher
3. **Translate CTA into RoMEO standardised phrases**
   - More readily understandable
   - Easy to compare publishers
4. **Publisher contacted**
   - Proposed record presented allowing for clarification
   - Encourages Open Access compliance
5. **Final record made live**
   - Pending further updates or policy changes
   - Updates to Zetoc & British Library
RoMEO Challenges

• No information online
  – Publisher reluctance or uncertainty
  – Not all respond…a problem!
• Conflicting information
  – Two different sets of guidelines
  – Poorly phrased guidance
• Unclear boundaries
  – Common for learned societies using publishers
• Changes to publisher permissions
  – Try to keep site up to date
  – Some publisher rights change frequently
• Increasing size of RoMEO data set
  – Full time job

Some Solutions

• Communication with publishers & editors
  – Electronically, via phone or in-person
• Attempt to maintain good relations
  – With individual publishers & key contacts
  – With RoMEO users globally
  – With the OA, academic & publishing communities
• Viewpoint that OA is companion process
  – Not in competition with publishers
  – Studies on ArXiv seem positive for this
• Archiving status unclear
  – Not ideal, but indicates activity.

New Developments

• Paid OA listing
• Funding Agency compliance
RoMEO – The Future

- To provide improved policy information by journal
- Any suggestions on how to improve RoMEO?

JULIET

- Currently 20 funders listed
- Awaiting 3 policies (UK)
- 11 UK
- 2 Australia
- 1 each Austria, France, Germany and USA
- 3 (and 1 awaiting) from charities
Questions?

Links

• [Http://www.sherpa.ac.uk/romeo.php](http://www.sherpa.ac.uk/romeo.php)
• [http://www.sherpa.ac.uk/juliet/](http://www.sherpa.ac.uk/juliet/)