

## **GUIDELINES FOR QUOTATION AND OTHER ACADEMIC USES OF EXCERPTS FROM JOURNAL ARTICLES**

*These Guidelines concern the use by researchers and other scholars of material from published journal articles in subsequent print and electronic publications and by educators of limited amounts for educational use including electronic course-packs. It is recognized that the short quotation of copyright works for non-commercial research purposes is a normal practice for scholarship and education. Further, such uses would often be privileged by a legal exception to local copyright laws or in any event would be likely to be a type of permission readily granted by the publisher. The use of the entirety of journal articles or book chapters is not covered by this statement, and normal permissions clearances through publishers or rights clearance organizations should be followed for such matters.*

The International Association of Scientific, Technical & Medical Publishers (“STM”) and the Professional Scholarly & Publishing division of the Association of American Publishers (“PSP”) believe it is in the interest of the scholarly and professional community as well as scholarly and professional publishers, to set out some common principles with respect to the use of limited amounts of journal article content in other published academic works and for educational use, and to reduce legal uncertainty with respect to such uses. STM and PSP have with other trade associations recently published a White Paper in May 2007 on the general subject of academic re-use entitled *Author and Publisher Rights For Academic Use: An Appropriate Balance*<sup>1</sup>.

Publishers accept that scholarly articles often require the direct reproduction of illustrative material (such as figures, tables, structures) for the purposes of discussion or comparison with other data, and that the electronic version of an article needs to contain the same illustrative material in order to maintain the authenticity of the record in both print and digital form. Publishers accept that the use of short quotations is normal in scholarship, generally intended to place the

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<sup>1</sup> <http://www.stm-assoc.org/documents-statements-public-co/2007%20-%202005%20Author%20Publisher%20Rights%20for%20Academic%20Uses--%20an%20Appropriate%20Balance.pdf>

new work in scholarly context or to comment on the quoted work or its impact, and that there is minimal potential in such practices of negatively impacting the demand for the original work.

Publishers also understand that in the development of course-packs (including for distance education), whether in print or electronic form, universities often wish to use similar quotations or limited excerpts.

With respect to the use of small portions of journal articles by academics and scholars, or the institutions in which they conduct their research or educational work, that scholars (or their institutions with respect to course-packs) may (without obtaining explicit permission from publishers):

- Use a maximum of two figures (including tables) from a journal article or five figures per journal volume (unless a separate copyright holder is identified in such figure, in which event permission should be sought from that holder);
- Use single text extracts of less than 100 words or series of text extracts totaling less than 300 words for quotation; and
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- The quotation or excerpt must never be modified.

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These Guidelines are intended to help reduce legal uncertainty and improve and simplify administrative procedures with respect to the use of short excerpts of scholarly and professional information from journal articles. The participating publishers believe that by establishing clear guidance, research and scholarship as a whole is improved and scientific communication and education are made more effective and efficient.

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