USE OF COPYRIGHTED WORKS FOR EDUCATIONAL AND RESEARCH PURPOSES IN THE DIGITAL AGE

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Abstract - Educational work is based on learning and using previously created cultural, artistic and scientific values. In the course of their studies, students at universities gain knowledge from the works of writers, artists, scientists, researchers, as well as other creative people. It is important to ensure that the students, based on them, create their own works created only as a result of their own mental activity.

Copyright law allows the use of copyrighted works for educational purposes. Copyright shall not be considered infringed if a work of an author is used without the consent of the author and without compensation for educational and research purposes.

Large amendments to the legal regulation of copyright in Latvia have recently entered into force, based on the EU Directive Copyright in the Digital Single Market (CDSM) Directive. This article will analyse the most significant amendments to Law that have changed the use of copyrighted works in the educational process of Latvia.

Keywords - Copyright, Educational Purpose, Digital Single Market.

I. INTRODUCTION

In the digital age, the use of copyrighted works for educational and research purposes has become a topic of significant importance. The advancement of technology and the ease of accessing and sharing digital content have raised questions about the scope and limitations of copyright law in educational and research settings. In response to these challenges, the European Union (EU) introduced the Copyright in the Digital Single Market (CDSM) Directive [1], which seeks to modernize copyright rules within the EU.

Educational work is based on learning and using previously created cultural, artistic and scientific values. The use of author's works in the educational process is important for both students and teachers.

In order for the pedagogue to fully prepare for the educational process, so that the knowledge he provides and the skills to be learned are comprehensive and easy to understand, he creates various opinions or teaching materials. These materials often include materials created by other authors, previously published or made public, citing limitations for educational purposes. Following modern educational methods, these learning materials are often made public or made available on the Internet in digital format. It is important to ensure that the educational process is modernized and at the same time the rights of the authors of the works included in the materials are protected.[2]

According to the Copyright Law [3], pupils and students, as well as scientists and researchers of various fields, have the right to use fragments of other authors' works in their education and research, provided that the title of the used work and the author's name are indicated (Article 21). Such use is permitted only if it does not contradict the rules of normal use of the author's work, for example, by parodying the work, one must not violate the boundaries of decency and offend the honor and respect of the author. It must also not unreasonably restrict the rights of the author, for example, it must not create copies of the book without permission and distribute them to students, thus limiting the author's opportunities to earn revenue from the sale of the book (Article 18).

In the course of their studies, students at universities gain knowledge from the works of writers, artists, scientists, researchers, as well as other creative people. It is important to ensure that the students, based on them, create their own works created only as a result of their own mental activity. However, students do not always use works created by other

[1] Directive (EU) 2019/790 of the European Parliament and of the Council of 17 April 2019 on copyright and related rights in the Digital Single Market and amending Directives 96/9/EC and 2001/29/EC. Available: https://eur-lex.europa.eu/legal-content/EN/TXT/HTML/?uri=CELEX:32019L0790&qid=1688753268084

[2] Veikša I. (2019) Autordarbu izmantošana mācību materiālos. XX Turiba University Conference "Human values in the digital age", ISSN 1691-6069; pp. 256. Available at: https://www.turiba.lv/storage/files/conference-xx-2019_1.pdf

[3] Copyright Law. Adoption: 06.04.2000. Publication: Latvijas Vēstnesis, 148/150, Available at: https://likumi.lv/ta/en/en/id/5138.

authors in good faith, use them without references, thus pretending to be written by themselves, or order these works to be written by others. This constitutes plagiarism, or one of the violations of academic integrity.[4]

Due to technological progress, works made available on the Internet are easily accessible, their content tends to be increasingly affluent and enticing, and everyone seeks to view, listen and share it with friends and relatives, using the advantages provided by the new technologies. [5] Certain limitations or exceptions must be established for specific types of work or specific situations of use. [6]

Awareness of the need to protect intellectual property should be created from an early age, from kindergarten and the first years of school. However, in Latvia, intellectual property issues are only included in the secondary school curriculum.[7] The conceptual report "On the Intellectual Property Protection and Management System in the Republic of Latvia" identified the need to raise awareness of intellectual property in primary, elementary, and secondary schools, as well as to introduce IPR issues in the study programs of Latvian higher education institutions (Cabinet of Ministers of Latvia, 2017).

The society lacks an understanding of the need for legal protection, as intellectual property issues are included only in the secondary school curriculum in Latvia. Awareness of the need to protect intellectual property should be promoted from an early age, from kindergarten as Internet users become younger and younger. Intellectual property and its protection must be an integral part of the curriculum throughout the education system, from primary to higher education. School curricula should include at least the basic principles of intellectual property, the nature of piracy, and the dangers it poses. In colledges and universities the acquisition of these competencies should be included in the compulsory study courses at least in all bachelor's study programs. There is also a need to promote teacher training by educating teachers about intellectual property rights. In order to educate the society, it would be desirable to implement various information campaigns, which are already taking place, but to a lesser extent. [8]

If plagiarism is a copyright infringement, it should be noted that not every copyright infringement is plagiarism. Copyright is a monopolistic control for a limited period of time that national laws grant to the creator of any artistic, intellectual or scientific entity. But the rights granted to the copyright owner are not absolute, because they include a condition for the fair use of the work for the advancement of knowledge and legitimate use, which is neither copyright infringement nor plagiarism[9]. Not all aspects of copyright relate to the commercial exploitation of works. Copyright (to use the work) is also the right of author (as a creative personality)[10]. Passing a work as your own (without reference) violates the author's copyright (the right to be recognized as an author) as well as the right to title (right to demand that his/her name be duly stated in all copies and in any public event). By not respecting the author's moral rights and copying his/her work into one's work, the author's economic right to reproduce the work is also infringed. [11]

II. IMPLEMENTATION OF CDSM DIRECTIVE

2.1. CDSM Directive

The CDSM Directive, formally known as Directive (EU) 2019/790, was adopted by the EU in April 2019 and requires member states to implement its provisions into their national laws by June 7, 2021. The directive aims to harmonize copyright rules across the EU and address various aspects of the digital market, including educational and research uses of copyrighted works. Before this regulation, the Copyright Directive[12] was in force, which also set exceptions for educational purposes[13],but the CDSM

[4] Veiksa I. (2019) Plaģiātisms un akadēmiskais godīgums studējošo darbos Latvijas augstskolās. *Acta Prosperitatis*, Journal of Turiba University No. 9, ISSN 1691-6077. Riga, 2019. Pp.72-87. Available at: https://www.turiba.lv/storage/files/9-acta.pdf

[5] Veikša I., Kisnica I. (2016) Consumer-friendly access to digital content by ensuring fair remuneration of creators: a Latvian study, Published: Jul 2016, Page Range: 358–369; DOI: https://doi.org/10.4337/qmjip.2016.03.05

[6] Veikša I. (2023) The author's moral right of withdrawal and its reasonable restriction or contractual waive. The Journal of World Intellectual Property, Online ISSN: 1747-1796,© John Wiley & Sons Ltd (JWIP). First published: 06 June 2023; DOI: 10.1111/jwip.12284.

[7] Veikša I. (2023) Use of Copyrighted Works in Business. International Journal of Learning and Change. Special Issue on: BM-2022 Contemporary Issues in Business and Management. January 2023. Published by Inderscience. Online ISSN: 1740-2883; Print ISSN: 1740-2875 International Journal of Learning and Change 1(1):1; (Scopus) DOI: 10.1504/IJLC.2023.10054874;

[8] Veikša I. (2022) Legal use of intellectual property for business, 12th International Scientific Conference „Business and Management 2022", May 12–13, 2022, Vilnius, Lithuania. ISSN 2029-4441 / eISSN 2029-929X; https://doi.org/10.3846/bm.2022.722.

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[10] Torremans, P and Holyoak, J. (1998) Intellectual Property Law London, Edinburg, Dublin: Butterworths. p.209.

[11] Veikša I. (2021) Assessing creativity from the viewpoint of law. *Creativity. Theories – Research - Application*. Vol. 8, Issue 2, 2021; ISSN: 2354-0036. Raksts iekļauts Scopus datu bāzē. DOI: https://doi.org/10.2478/ctra-2021-0017. Published Online: 20 Nov 2021, Page range: 53 – 66.Available at: https://www.sciendo.com/article/10.2478/ctra-2021-0017.

[12] Directive 2001/29/EC of the European Parliament and of the Council of 22 May 2001 on the harmonisation of certain aspects of copyright and related rights in the information society

[13] Veiksa I., Bordans J. (2011), Critical review of the implementation of the EC Directive on Copyright in the Information Society (2001/29/EC) in Latvia. Copyright in the Information Society. A GUIDE TO NATIONAL

Directive defines the procedure for use in the digital environment.

Regarding educational uses, the CDSM Directive introduces exceptions and limitations to copyright law to facilitate digital education. Member states are allowed to provide for exceptions to copyright for digital and cross-border uses of works for educational purposes. This means that educational institutions can benefit from more flexible copyright rules when using copyrighted materials in their teaching activities, such as making digital copies of works for online courses or using copyrighted materials in presentations.

The CDSM Directive represents an effort to strike a balance between protecting copyright holders' rights and fostering educational and research activities in the digital age. It recognizes the importance of enabling access to knowledge while ensuring that creators and rightsholders are fairly compensated for their work. As with any copyright-related legislation, the actual implementation and interpretation of the CDSM Directive's provisions will continue to evolve as member states incorporate it into their national laws and adapt to the changing digital landscape.

This article will review the amendments included in the Latvian Copyright Law regarding the use of copyrighted works for educational and research purposes in the digital age, made in accordance with the requirements of the CDSM Directive.A voluminous annotation [14] has been added to the amendments to the law, which both formulates the identified problems and describes the solutions to eliminate these problems. The annotation describes the current situation in the field of copyright protection and indicates that due to the rapid development of technology, the ways of creating, producing and using objects of author's works and related rights in the digital environment have changed, but the legal norms governing copyright have not been adapted accordingly. Consequently, both the subjects of copyright and related rights, as well as the users of author's works and objects of related rights, lack legal clarity about certain types of use of works and objects of related rights in the digital environment.

2.2. Educational and research purpose

The copyright law allows the use of author's works for educational purposes in various ways, including in textbooks that meet educational standards (Article 21). However, the understanding of the textbook in its traditional sense has long been outdated, and teachers should be given the widest possible opportunities to work with various and versatile materials[15], created in digital format. Therefore, it is necessary to find ways to enable educators to work with different and versatile materials, including creating them with the help of new technologies and making them available on the World Wide Web - on the Internet.

The author's work may be used without the author's consent and compensation if the work is used for educational and research purposes, with the mandatory indication of the title of the used work and the name of the author. This means that the teacher has the right to copy excerpts from a book, article, research, photograph or painting, etc. and use them as illustrative visual aids to help pupils (students) understand the learning material. Evaluating this limitation with the help of the so-called "three-step test", it is concluded that it is not permissible to copy the book in many copies for inclusion in the school library. In addition, the extent appropriate to the purpose of the activity must be assessed in accordance with general legal principles.

As it was concluded from the research carried out within the framework of the World Intellectual Property Organization (hereinafter - WIPO), in all 189 WIPO member states copyright laws include exceptions for education, and in most member states at least 8 legal provisions are devoted to this issue. The study shows that a significant majority of Member States provide exemptions for personal use, quotation, reproduction, publication, public performance and also broadcasting for educational purposes. Member States were divided on whether a new international agreement was necessary or whether learning best practices was sufficient (WIPO 2017).[16]The 37th session of the Standing Committee on Copyright and Neighboring Rights (SCCR) was held within WIPO in November 2018, where the need to further coordinate copyright limitations and exceptions at the international level was discussed. The differences in the positions of different countries were obvious. Regarding educational goals, teacher Nikola Wachter spoke, describing her own efforts as a teacher to get and keep students' attention by choosing an exciting piece of art, a favorite song, or a cartoon character. She believes that the lack of an international copyright instrument that addresses cross-border online collaboration creates obstacles for

IMPLEMENTATION OF THE EC DIRECTIVE. Edited by Brigitte Lindner and Ted Shapiro, Edward Elgar Publishing, 2011. 512 pp.

[14] Anotācija. Available at: https://titania.saeima.lv/LIVS14/SaeimaLIVS14.nsf/0/109B9D11585B52FFC2258903003E4387?OpenDocument

[15] Oliņa, Z. (2013) Iesaka jaunus modeļus grāmatu digitalizācijai.Available at: http://www.e-klase.lv/lv/zina/zinas/aktualitates/iesaka-jaunus-modelus-gramatu-digitalizacijai/

[16] WIPO (2017) 33rd session of WIPO Standing Committee on Copyright and Related Rights.Available at: http://aippi.org/no-show/33rd-session-of-wipo-standing-committee-on-copyright-and-related-rights-sccr/

teachers in their daily educational work (AIPPI, 2019).[17]

Article 5 of the CDSM requires Member States to specify in their laws that use in the digital and cross-border learning process means the digital use of objects of works and related rights for the sole purpose of illustration. Such use may only take place under the control of the educational institution, on its premises or in other places, or in a secure electronic environment accessible only to pupils or students and teaching staff of the educational institution. The Directive requires a more precise formulation of the concepts "illustrative purpose" and "secure electronic environment".

In the Latvian law, this explanation is included in Article 21, more clearly defining that "use for the purpose of illustration" is the use of such works or their fragments that support, enrich or supplement the learning process. Further, "secure electronic environment" is a digital environment for educational purposes, in which the authentication of pedagogues and learners, including those who receive education in foreign countries, according to educational programs licensed in Latvia, is ensured.

It should be noted that EU member states have established two types of procedures for the use of works and objects of related rights in education - either in the form of a restriction of rights or on the basis of a license agreement. In Latvia, use for educational purposes is defined as a limitation of rights. However, this procedure could be replaced with a licensing procedure if a simple and easy procedure for obtaining licenses that would meet the needs and characteristics of educational institutions was developed. Then the state would ensure that rights subjects receive fair compensation for their work or the use of related rights objects in education. The directive specifically emphasizes that Member States that decide to provide for licensing and fair compensation should use systems that do not impose an additional administrative burden on educational institutions.

1) Educational institution

Use is allowed only in educational institutions in the direct learning process. The Copyright Directive allows specific reproduction to be carried out in educational institutions but does not provide for a definition of the term "education", which should be interpreted in the sense of Article 10(2) of the Berne Convention, where the term refers to all levels of education, excluding teaching outside educational institutions, such as general education, which is available to all. In addition, the term refers to both state-funded and private educational institutions [18] .Copyright Directive also emphasizes that exceptions and limitations apply to all forms of education, including distance learning (Article 42 of the Preamble). According to the Latvian Education Law[19]educational institution is the institution founded by the State, local governments, State higher education institutions or other legal or natural persons with the task of implementing educational programmes, or a commercial company for which the implementation of educational programmes is one of the types of activity (Clause 1). It can be concluded from these definitions that educational institutions can be both state institutions and merchants to whom the state has delegated the function of education by issuing a relevant permission to educate (license) and assigning an educational institution number.

2) Non-commercial purpose

It is allowed to use published works or their fragments only for non-commercial purposes. The Copyright Directive emphasizes that exceptions and limitations apply to all forms of education, including distance learning, the non-commercial nature of said activity should be reflected in the activity itself. The organizational structure and financial resources of the relevant institution are not the determining factors in this regard (clause 42 of the preamble).

Use is allowed only for non-commercial purposes - the user may not make a direct or indirect profit from it. The term "non-commercial" refers to the learning process itself, not the organizational structure or means of financing the institution[20]. Therefore, even educational institutions that implement their study programs on the basis of tuition fees received by students may use works of authorship created by other persons for educational purposes. The purpose would be commercial if the educational institution or the creator of the learning tool would, for example, publish the learning tool in book form and sell it in a bookstore.

If the university receives tuition fees from the students, it is not even considered for commercial purposes. The title of the used work and the name of the author must be indicated. The source - the

[17] AIPPI (2019) Autortiesību ierobežojumi un izņēmumi - Ziņojums no jaunākās SCCR sanāksmes WIPO.Available at: http://aippi.org/no-show/limitations-and-exceptions-on-copyright-report-from-latest-sccr-meeting-in-wipo/

[18]Gulbis R, Tomsone I. (2013) Autortiesību ierobežošana izglītības un zinātniskās pētniecības mērķiem. Juridiskā zinātne, Nr. 4, 2013, Latvijas Universitāte, pp.30.Available at: https://www.journaloftheuniversityoflatvialaw.lu.lv/fileadmin/user_upload/lu_portal/projekti/journaloftheuniversityoflatvialaw/No4/R_Gulbis.pdf

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[20] Eversheds Bitāns (2010) Skaidrojums par autortiesību un blakustiesību objektu izmantošanu mācību procesā. 14.lpp.Available at: https://visc.gov.lv/vispizglitiba/saturs/dokumenti/metmat/skaidrojums_par_autortiesibam.pdf

publisher or the website from which the work is taken - must also be indicated.

3) Secure electronic environment

There is a difference whether teaching materials are made public on the Internet in a way that they can be accessed only by persons involved in the educational or research process with authorized access to the internal protected networks of the relevant educational institution, or in a way that the entire public can access them. If in the first case it will be recognized as use for educational and research purposes, then in the second case it will not be possible to refer to this restriction. The UK Copyright, Designs and Patents Act 1988 allows an educational institution to make available works of authorship for educational purposes through a secure electronic network accessible only to students and staff of the institution[21].

In Latvia, the law stipulates that a secure electronic environment is a digital environment for educational purposes, in which the authentication of learners and persons implementing the educational program is ensured. The place of use of the work or its fragments, if it is implemented in a secure electronic environment, is considered to be the member state of the European Union or the country of the European Economic Area where the relevant educational institution is established.

4) Illustrative purpose

The work of another author may be used for illustrative purposes only. The copyright directive states that a restriction on the right of reproduction and publication is allowed only if the object of the right is used for the purpose of "illustration" - works can only be used as examples to illustrate or explain what is taught, so - a small fragment of a work that refers to the specific subject in the relevant lesson or lecture. Such a condition has not been introduced in the national law of Latvia. Likewise, no legal act in Latvia determines the permissible amount of use mathematically, for example, allowing the use of 10% of a work or 10 pages from a book, etc. The copyright law only stipulates that use for educational purposes is allowed only to the extent appropriate for the purpose of the activity. It must be evaluated each time, according to the scope of the work and the type of use, taking into account the principles of limitation of rights. When determining how large a fragment of a work can be used in accordance with copyright restrictions for educational and research purposes, both the size of the fragment in relation to the total volume of the work and its content importance should be taken into account when assessing whether its use negatively affects the primary market for the distribution of the work.[22]

The German Copyright Act (Urheberrechtsgesetz, 1966)[23] allows the use of a certain percentage of the entire work. In Germany, as in Latvia, works are allowed to be used for education in educational institutions (primary schools, schools, universities, vocational schools and other educational and further education institutions (Article 60a, part four). It is allowed to reproduce, distribute or make public up to 15 percent of the published work for non-commercial purposes, to illustrate learning in educational institutions. This may be done by teachers, examiners, event participants, as well as other persons to present lessons or lectures or learning results in an educational institution (Article 60a, first part). There is usually no charge for this type of use compensation. However, compensation must be paid in cases where the works are made available on the Internet. In such cases, fair compensation must be paid through the collective management organization of property rights (Article 60h).

The UK Copyright, Designs and Patents Act 1988[24]allows a person who teaches to use copyrighted works to illustrate lessons in a 'fair use' for non-commercial purposes (Section 32). The amount of use is much smaller - it is allowed only in the amount of 5 percent of the work during 12 months (Article 36, paragraph five). Since 1911, UK courts have been interpreting copyright restrictions according to the concept of "fair dealing", the content of which is not defined in law, but gradually developed in court practice. However, due to the significantly different regulation, the analysis and application practice of the legal framework of the United Kingdom cannot be widely used in determining the permissible scope of use of works in accordance with Article 21 of the Latvian Copyright Law.[25]

The Copyright Law of Latvia states that use for the purpose of illustration means use that supports, enriches or supplements the learning process.

Placement of References

Every time after quoting, mentioning a passage or stating certain information (figures, statements, conclusions, conclusions, etc.), it is mandatory to indicate the source by creating an appropriate reference. The reference should be at least after each paragraph if the paragraph contains only one author's quotation or retelling of the text. If a paragraph contains quotations from several authors, the reference should be placed after the text of each author.

[21]Copyright, Designs and Patents Act, 1988, 36.2, 36.3. Available at: https://www.legislation.gov.uk/ukpga/1988/48/contents

[22]Gulbis R, Tomsone I. (2013)pp. 30.

[23] Act on Copyright and Related Rights (Urheberrechtsgesetz, UrhG). Act shall enter into force on 1 January 1966.Available at: https://www.gesetze-im-internet.de/englisch_urhg/englisch_urhg.html#p0328

[24] Copyright, Designs and Patents Act 1988.Available at: http://www.legislation.gov.uk/ukpga/1988/48/contents

[25]Gulbis R, Tomsone I. (2013), pp. 32. lpp.

Each university in Latvia has established internal rules governing the creation of references, and each of them has chosen a slightly different form. Needless to say, this was done with the aim of making it easier to detect plagiarism, so that it would not be so easy for students to use the works created by students of other universities to create their own works.

Some universities require placing references in parentheses after the text (at the end of a sentence or paragraph), using APA style for referencing. In the references that are included in the text, usually only the minimum data is indicated - the author's surname, the year of publication or publication and the page used. References to legal acts only indicate the name of the act, the year of adoption and the article. The full name of the source is given only at the end of the article. Other universities require references to be placed in the footnotes of each page. If a footnote reference is made, the full reference to the author, year of publication or publication, title of the work, publisher or website, and the page used must be given at the bottom of the page. If the work is published electronically, the electronic identifier DOI of the article must be specified. References to legal acts, on the other hand, must indicate the name of the act, the date of adoption, the time and place of publication of the legal act, as well as the article.

III. CONCLUSIONS

The Latvian legislator has fully fulfilled the requirements of the CDSM and introduced into the national law all the conditions regarding the use of author's works for the purpose of education. In the process of education and research, it will be possible to use the works in the future for the purpose of illustration, including in digital format, if such use takes place under the control of the educational institution in its premises or in a secure electronic environment, accessible only to educators and students of the educational institution, in an amount appropriate for the purpose of use. It is also explained what illustration means - it is the use of such works or their fragments that enrich or complement the teaching content. The understanding of a secure electronic environment has also been clarified - it is a digital learning environment that can only be accessed by educators and learners of an educational institution using appropriate authentication procedures, including password authentication.

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