A National Monograph
Strategy Roadmap

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Introduction

The scholarly monograph - the book-length result of dedicated research - finds itself in a precarious position. As library budgets diminish, and are further squeezed by the increasing costs of journals, there is little left for purchasing monographs.

What budget remains is often spent on duplicates of books that are available at other academic libraries. More unusual or important local collections risk being sidelined or undervalued.

While the monograph remains a critical part of the scholarly dialogue, especially within the humanities and social sciences, sales are falling and as a result researchers find it increasingly difficult to publish their book-length research.

Where journals have tended to dominate discussion of academic print resources, the monograph has been a somewhat neglected part of the scholarly communications debate. But this inattention is giving way to sustained focus by publishers, libraries, researchers, funders and systems vendors exploring the changing role and shape of the monograph and its future as part of the scholarly communications landscape.

We have an opportunity to begin collectively addressing some of the core challenges that confront the provision and support of the scholarly monograph; past, present and future.

About this Roadmap
Over the past six months over 60 librarians, academics, funders, publishers and sector bodies have identified the core features of a national infrastructure that will help transform the creation, collection, use and preservation of the scholarly monograph.

This roadmap describes a series of practical, doable ideas; ideas that will evolve and respond to changing contexts, user needs and the results of prototypes and pilots. Over the next few months the project will begin to develop plans for these potential pilots and prototypes.

But all of this will remain ideas without action: action by us, by you and by anyone who has a stake in, or an interest in, the creation, collection, use and preservation of scholarly monographs.

While the project and this report have primarily been aimed at those supporting the monograph’s creation, collection and preservation, such as librarians, publishers and relevant sector bodies, the work will also be of interest to researchers and academics as well as funders, policy makers, systems vendors, institutional managers and anyone with an interest in the past, present and future incarnations of the scholarly monograph.

It is only together that we can work to build these ideas and realise the vision of a national research collection that has the potential to transform the experiences and work of researchers and students in the UK.

This report marks a beginning, not an end.
The Vision

Within 5 years UK researchers and students will have unparalleled access to a distributed national research collection enabled by an open collaborative national infrastructure.

This has helped transform the creation, collection, use and preservation of the scholarly monograph through:

A. Collaboration - fostering collaboration between, and within, sectors to create the most effective framework for managing monograph collections old and new
B. Experimentation - developing opportunities to test and experiment with new models and formats
C. Intelligence - enabling institutions, organisations and individuals to make the right decisions through improved data sharing
D. Strategy - reducing overheads, enabling agreements and policies and sharing infrastructure
E. Systems integration - reducing and streamlining the number of systems and processes to minimise duplication of assets, resources and effort
F. Service provision - designing services which ensure a shared, cost effective and transparent approach to managing monograph collections
G. Providing benefits to end users - developing effective metrics to better understand what users do with monographs and evaluate new and emerging needs in light of digital delivery
Context

Background to the National Monograph Strategy project: where it came from, its approach and the people involved.

This section outlines the current landscape, aims and objectives of the strategy and the potential benefits and how the project will seek to implement the ideas. Finally it describes the specific problems that were identified as priority areas for any strategy to address.

Background

The National Monograph Strategy (NMS) is a six month project funded as part of Jisc’s pilot co-design initiative working with UK higher and further education sector bodies to collaboratively find solutions to the priority problems experienced by people in universities and colleges. More information on co-design is available at jisc.ac.uk/research/funding.

Running from July 2013 to January 2014, the NMS project worked closely with its partners: the Society of College, National and University Libraries (SCONUL) and Research Libraries UK (RLUK), as well as a broad range of key stakeholders from different sectors.

The project aimed to explore the potential for a national approach to the creation, collection, preservation and digitisation of scholarly monographs.

Each workshop consisted of 20-30 key stakeholders with an interest in the monograph, including librarians, publishers, academics, and representatives of funders and sector bodies. The project’s expert advisory panel formed the core participants at each of the workshops, providing consistency and momentum.

The project also benefited from having a close and productive relationship with its co-design partners from SCONUL and RLUK: Ann Rossiter (SCONUL), David Prosser (RLUK) and Wayne Connolly (Newcastle University), who provided critical input and feedback throughout the process.

The project was divided into three short exploratory phases:

A. Mapping the monographs landscape:

B. Defining priority problems a strategy would need to address, and

C. Outlining solutions to the problems.

The project held three workshops which largely mapped to these phases.

1 To find out more of the background to the project and the three phases of work visit the project’s blog: monographs.jiscinvolve.org

2 The project’s literature review/landscape report can be found here: monographs.jiscinvolve.org/wp/2013/07/31/monographs-landscape-report/

3 Details of the Expert Advisory Panel can be found here: monographs.jiscinvolve.org/wp/expert-advisory-panel-membership/
The Monographs Landscape

The National Monograph Strategy has emerged from a rich, complex and rapidly changing scholarly communications landscape in the UK.

While it is not the intention of this report to provide a comprehensive overview of that landscape, it is worth reflecting on some of the key changes, developments and trends that have both informed the strategy and will continue to exert an influence over its development and implementation over the coming years.

Collection Management and Strategy

The monograph presents the academic institution with a double-bind. The changing demands on space, especially in libraries, mean that large physical collections need to be rethought to enable the reconfiguration of space to meet the changing demands of students and researchers. But what has worked so elegantly for journals doesn’t necessarily apply to monographs. While users have largely embraced digital access to journal articles (with hardcopy versions used as ‘last copy’ backup) the same isn’t true for the monograph. Research suggests (sr.ithaka.org/research-publications/ithaka-sr-jisc-rluk-uk-survey-academics-2012) that academics require the hard copy text for long form reading and in-depth research, especially within the humanities and social sciences. While there continues to be an expectation of digital access on the part of users, the requirement for the full-text monograph means the paper version often provides a better experience for the researcher and student.

The UK Research Reserve (UKRR) (ukrr.ac.uk) is an exemplar in the development of a national and collaborative approach to the challenge of retaining low-use print journals. The collaboration between academic libraries and the British Library enables its members to de-duplicate print journal holdings if the title is held by three other UKRR members (including a copy at the British Library). This ensures long-term access to journal titles while also allowing libraries to free up precious space and resources. While the challenges of the monograph are different than those associated with the journal, UKRR nonetheless provides a useful model for how a national, strategic approach to the monograph collection might be undertaken.

In particular, UKRR has been successful in building a trust fabric between participants. Mechanisms such as formal agreements and the inclusion of the British Library the document supply service have been key to developing confidence. Reliable, comprehensive and timely data has helped ensured libraries were confident in basing local decisions on what was happening elsewhere nationally. The introduction of data from SunCat (suncat.ac.uk/search), the UK’s union serials catalogue, has helped both reduce some of the local burden in checking data and provided a more comprehensive national picture.

4 To get an overview of librarians thoughts on UKRR (and other ‘last-copy’ services in the UK) see the white paper by David Kay, Owen Stephens and Annette DeNoyer for Innovative Interfaces Inc on Last Copy Services: iii.com/sites/default/files/imce/UKInnovative%20Conversation2014-05_Last%20Copy.pdf
As UKRR highlights, the role of the national libraries in any UK-wide approach to the management of monographs will be critical. As the British Library’s new content strategy makes clear, the role of the national library is increasingly moving from a focus on ‘stored knowledge’ to one where ‘smart knowledge’ is paramount. Libraries will increasingly be linking and connecting to content, which means that local collections will need to be placed within a larger national, and even international, context.

Built on the Copac catalogue (copac.ac.uk) of around 90 UK research and specialist libraries, the Copac Collection Management Tools (CCM) (copac.ac.uk/innovations/collections-management) were developed as part of a partnership between Copac, Jisc, Research libraries UK (RLUK) (rluk.ac.uk) and the White Rose consortium (whiterose.ac.uk) of academic libraries.

The mission of the tools is to:

Promote the efficient management and exploitation of collections, pursuing excellence in research and safeguarding long-term access to materials. Through collective action the use of the CCM tools will help to realise the community vision to build a national research collection.

With the partners, CCM has developed a prototype tool that enables a library to see to what extent their holdings overlap with other Copac institutions. The tool primarily supports libraries in decisions around collections and print stock management, specifically the retention and disposal of print material. Though use by the partner institutions other use cases are emerging, including some around informing purchase decisions and prioritising material and collections for digitisation. While CCM remains primarily a tool for those research institutions that are part of Copac, it has the potential to underpin a national solution for the management of legacy monograph print collections.

More information is available at:

Supporting research

UK Research Reserve (UKRR)
ukrr.ac.uk

SunCat
suncat.ac.uk/search

Copac catalogue
copac.ac.uk

Copac Collection Management Tools (CCM)
copac.ac.uk/innovations/collections-management

Research libraries UK (RLUK)
rluk.ac.uk

White Rose consortium
whiterose.ac.uk

The Policy Landscape

Developments like those described above are informed by, and help inform wider policy decisions from government and elsewhere. While much of the attention around open access has been focused on journals, there is a growing desire to see national and funding policies that also apply to monographs. Indeed, as open access increasingly plays a role in how research impact is measured and assessed, its implications for the monograph are ever more acute.

The relationship between the monograph, open access and research impact is something that UK funders are turning their attention to. The higher education funding council in England (HEFCE) have recently convened a panel of experts to explore the issues surrounding monographs and open access in order to understand the challenges confronting the monograph and open access publishing and how these are likely to inform the role of the monograph in the evolving scholarly lifecycle.

With HEFCE’s recent policy announcement stating that journal articles and conference proceedings need to be open access in order to qualify for submission to the next Research Excellence Framework (REF) this group’s work will be of critical importance in the coming years.

The transition to open access monographs is also being explored by the OAPEN-UK (oapen-uk.jiscebooks.org) project. The project builds on the Open Access Publishing in European Networks (OAPEN) (oapen.org/home) project and the OAPEN Library, an open access scholarly monograph platform for HSS titles. Specifically, OAPEN-UK aims to build up an evidence base surrounding the challenges and opportunities of open access monographs so that stakeholders in this space, including policy makers, can make evidence-based decisions. While the relationship between open access and the monograph is currently the key driver for much of the policy work currently taking place, the evolving monograph form is beginning to emerge as a topic of interest to policy makers, funders and stakeholders in this space.

While interest in the form of the book has a long history, there have been a number of recent announcements that have signalled policy makers, funders and national bodies are beginning to take a far greater interest in the form of the monograph, and its implications for the future of scholarship and research. In the UK this initial interest is exemplified in the funding of a project to explore the ‘future of the book’ through a partnership between the Arts and Humanities Research Council (AHRC) and the British Library. In the United States the Andrew W. Mellon Foundation have for a number of years been working with universities to understand how digital practices in publishing can be incorporated into humanities scholarship. They have recently announced a programme of work exploring the ways institutions and scholars might be encouraged to explore the potential of digital scholarly monographs. Importantly, what these developments highlight is that policy develops are still struggling to catch up with the major cultural and technological changes that threaten to radically undermine the underpinnings of the scholarly monograph.

6 hefce.ac.uk/whatwedo/rsrch/infrastruct/oa/monographs
7 hefce.ac.uk/pubs/year/2014/201407/
Web-based tools, services and infrastructure

The web is enabling access to new, low-cost publishing services, tools and infrastructure. The components of the scholarly publishing process have been broken up and made available as discreet web-based services. While such services remain a relatively small part of the scholarly publishing ecosystem, they are developing their own growing user bases, and highlight the opportunities that are being realised in this space.

These opportunities are also being seized by academic institutions themselves. There is a growing interest in the institution as publisher, with universities such as University College London (ucl.ac.uk/library/ucl-press) and University of Huddersfield (unipress.hud.ac.uk) developing local presses. What’s interesting in these examples is that the library has provided a home for the university press, along with expertise and infrastructure.

There has also been significant interest in the development of open textbooks (jisc-collections.ac.uk/News/Institution-as-e-textbook-publisher-call-for-particiation) by institutions, with an increased willingness to explore community solutions to some of the seemingly intractable problems associated with e-textbooks that institutions, libraries and students face.

These broader changes in the technological landscape have provided institutions and libraries with an opportunity to reconfigure their roles in relation to the creation, curation and consumption of academic outputs and, specifically, the scholarly monograph.

In conclusion

While this brief overview of the monographs landscape cannot hope to be complete, the strategy has gathered a number of the key articles and examples that describe the changing monograph landscape in a literature review that can be found on the project’s blog (monographs.jiscinvolve.org/wp/2013/07/31/monographs-landscape-report).

It is from this context that the National Monograph Strategy emerged as a project and it is from this starting point that the project worked with various stakeholders to begin sketching out some ideas for addressing the challenges that the scholarly monograph faces.

8 For example: Authorea (authorea.com) for collaborative academic authoring, Open book publishers (openbookpublishers.com) for peer review, as well as open book publishers (peerageofscience.org) for publishing through to services like Kudos (growkudos.com) and Altmetrics (altmetric.com) to improve the impact and dissemination of scholarly outputs.

9 These problems include, for example, digital rights management and the restriction of access to a limited number of users at one time (sometimes with just one user at a time), the rising costs of textbooks, especially in subjects where one or two textbooks form the core resource in teaching.
The national monograph roadmap describes the components of a collaborative, national infrastructure that provides answers to the past, present and future challenges of the scholarly monograph.

The roadmap aims to be a doable, practical framework to corral action, guide effort and solicit engagement both for individual institutions and for the sector as a whole.

It is doable because it:
» Has a clear user focus and has been developed in an inclusive way with relevant parties
» Continues to be collaborative in its development and implementation, and inspires trust from the different communities involved
» Is an iterative, living plan; responding and evolving to changing contexts

The roadmap will achieve its aims by meeting three objectives:
A. Managing the legacy (Managing the past)
B. Improving access (Improving the present)
C. Developing new models and services (Enabling the future)
Benefits

Below are some examples of potential benefits for stakeholders of the national strategy approach described on the previous pages.

Benefits for students, researchers and academics:
- Increased access to content
- Improved discoverability and impact of monographs
- Improved use and re-use of digital monographs
- New forms of research and improved research outcomes

Benefits for libraries:
- Ensuring continued access to individual monographs and collections
- Enabling the reallocation of effort required for purchasing and providing access to digital monographs
- Enables focus on building collections based on institutional priorities and strength
- Frees up space
- Identification of monographs for priority digitisation
- Allowing a focus on enabling access to other types of library material, such as special collections and un-catalogued material

Benefits for publishers and presses:
- Improved customer experience
- Potential to realise value of monographs backlist through digitisation
- Stable business model for the digital monograph
- Opportunities for innovation and business development (access to open data via APIs, for example)

In order to deliver real benefits, however, any roadmap needs to result in real changes. This is why the roadmap doesn’t simply describe a vision, but also a strategy for delivering that vision.
The monograph sits at the heart of a complex and multifaceted scholarly communications ecosystem. During the project, workshop participants discussed and refined nine problems that confront those dealing with monographs in the UK and beyond.

Managing the Legacy

A. How to better manage library collections and acquisitions? The existence of large amounts of still uncatalogued material and incomplete metadata records can make it difficult to determine with certainty a national view of monograph collections. This affects the ability of individual institutions to manage their local collections within a larger national context. Purchasing and processing monographs involves duplication of resource across all institutions.

B. How to allocate preservation resources? There is a need to ensure that preservation resources are allocated strategically to maintain as comprehensive a collection as possible.

Improving Access

C. How to increase the trust in digital alternatives to the print monograph? Digital alternatives to the print version of the monograph are not always trusted by users.

D. How to reduce the impact of non-standard purchasing models as a barrier to access? Proliferation of different purchasing models for digital monographs means:
   i. reduced productivity for librarians who have to deal with a lot of different models
   ii. users have to learn too many different interfaces leading to non-ideal user experience

E. How to avoid duplication of effort in digitisation? Can we better understand the nature and extent of it?

Developing New Models and Services

F. What is the future and purpose of the ‘book’? Changing user behaviour is putting new demands on the systems that create and manage monographs.

G. How to deal with potential licensing barriers in the new uses of monograph content? Researchers and students want to access monographs when they want and on whatever device they want. Licences for content do not always permit librarians the flexibility to meet these demands.

H. What will sustainable business models for publishing monographs look like? The current business models for publishing monographs are under pressure as sales fall and prices are forced to rise.

I. How to measure the impact of a monograph? There is currently no agreed way to demonstrate the value of the monograph to research.

Using these problem statements as a foundation, the final two workshops began to sketch out potential solutions to these specific questions.

These outline solutions form the core components of an open, collaborative infrastructure that will underpin the vision of a national research collection.
The Solution

An overview of the infrastructure components and how they come together to realise the vision for a distributed national research collection.

As the problems described on the previous pages make clear, the roadmap is responding to a ‘messy’ problem. The solution described here seeks to provide a coherent picture of a shared infrastructure that can deliver a distributed national research collection for the UK.

As such, the solution includes interventions that move from the policy, foresight and licensing/business model level, through to the main infrastructure components which enable the development of new services and applications. The solution is the culmination of multiple strands of work as illustrated below that together deliver the National Monograph Strategy.
The speculative use case below describes the potential of this infrastructure for the University College London library and its users. The full use case is available on the NMS blog: monographs.jiscinvolve.org

**UCL: interview with Paul Ayris, Director of UCL Library Services, UCL Copyright Officer and Chief Executive of UCL Press**

*The view from the Library*

“*The challenge here is to provide better access to material (including books and journals) to academics and researchers, while managing the physical space more effectively for better learning and collaborative spaces.*”

*Ways forward?*

“*An early win would be copyright deposit materials, which are stored in six copyright deposit libraries in the United Kingdom and Republic of Ireland. With such holdings safely recorded in the NMS database, other libraries could then make data-informed decisions about retention/relegation of their local legacy print collections, safe in the knowledge that multiple print copies exist in the copyright deposit libraries, will be kept there and that document delivery is available.*”

*Document Delivery*

“*Another quick win in delivering a digital National Monograph Strategy would be for future document delivery for monographs have digital delivery as the default. Where copyright permissions allow, the British Library Document Delivery Service, or indeed any supplying library, could supply the requestor with a digital version of the requested item. Europe already has such a service – E-Books on Demand (books2ebooks.eu) – and UK libraries could become part of the network.*”

*Next Steps*

“*Partnership and collaboration are key to any developments. No university or its library can put a solution in place on its own. Collaborations such as COCOREES (cocorees.ac.uk) are a model of best practice. COCOREES offers researchers in Russian and East European Studies the only nationwide database on library collections and journal holdings in the UK. Regional consortia, such as the M25 Consortium (m25lib.ac.uk), and national consortia such as RLUK (rluk.ac.uk) also have a part to play.*”

“*Once partnership is in place, libraries can enter into collaborative agreements on retention and relegation of legacy print collections.*”

“*The time to grasp new opportunities and to innovate is now. The National Monograph Strategy needs to be able to support universities to do this.*”
The Roadmap

Further details on how the project plans to realise its vision, with more detail on how each of the component parts will underpin an open and collaborative monographs infrastructure for UK teaching, learning and research.

The ‘roadmap’ describes seven critical components that will make up a national monograph infrastructure. Each description includes key features and what the next steps will be to begin development. These will be led by Jisc with the support of the National Monograph Strategy project governance and partners.

There is also a ‘dashboard’ which includes an overview of the available budget for each idea, an initial calculation of the risks of the idea being unsuccessful, the project timescale for the development of the idea into a working prototype (or draft, proof of concept etc, as appropriate) and budget based on an estimate of people, financial and other resources required. Although not definitive, we have used the brackets high (£60k+), medium (£25-55k) and low (£0-25k) to assist with initial planning.

The ideas in this section build on existing thinking and initiatives, bringing them together to form a coherent and holistic infrastructure for the creation, collection, use and preservation of the scholarly monograph.

The ideas also share the following qualities:

- **National**: the ideas described in the roadmap will be scalable as part of a national infrastructure, without excluding consortia or partnership approaches
- **Collaborative**: They will be developed in partnership with the key actors affected
- **Open**: The default position will be openness of software and data
- **Agile**: The ideas described have agility built in. In most cases they will enable new developments, encourage third party collaboration and always have one eye on the future through the governance structure of the work.

Given the short timescales for the pilot phase of the project, this roadmap will be complimented by an implementation plan for each of the areas described, this will be developed as part of the project’s next steps through September and October 2014.
1. A National Monograph Knowledgebase

The foundation for a distributed national monograph collection

An open, comprehensive, accurate and timely bibliographic and holdings knowledgebase. This will form the core of the monographs infrastructure for print and digital monographs by enabling the development of a national collection strategy as well as new services and applications created for, and by, libraries, systems vendors, publishers and users.

Key features of the knowledgebase include:

» Diverse data: Includes bibliographic and holdings data, and where appropriate other data sets, such as usage data, impact metrics. Possibility to include data beyond academic libraries: museums, specialist/public libraries, archives, galleries

» Use of the existing infrastructure where appropriate, to reduce costs and risk

» Service development platform: The knowledgebase will enable new services and applications to be developed using the data (see use-case 1 above). The knowledgebase is de-coupled from the services and applications developed from its data, ensuring it is resilient, and can adapt to changing user requirements and contexts

» Trust infrastructure: Building on the collaborative potential of such a service, the prototype would also need to ensure that it is able to develop a body to facilitate the vision of a distributed national collection. This central organisation could build trust, relationships and non-technical developments (such as agreement frameworks and local strategies) across libraries in the UK. Wherever possible, this would be building on and collaborating with existing initiatives to drive forward a national approach

Next 3 - 6 Months

Undertake gap analysis to establish what data/services are currently available;

» Gather requirements and initiate discussions with existing services and infrastructure providers

» Undertake cost/benefit analysis

» Begin to explore possible business models

Following that, work with relevant organisations and projects to explore the scale and potential of replacing proprietary metadata with open surrogates.

Identify potential partners to establish the basis for a monograph’s ‘trust infrastructure’ in the UK, and look to pilot with institutions and consortia.

National Monograph Database

Timescales: 12 - 18 months (to initial prototype)

Risk: Medium ++

Potential budget: High +++
2. Measuring the Impact of Monographs

Understanding the impact of the scholarly monograph

A service that enables researchers, libraries and publishers to track and manage the impact of their monograph to provide new insights, track influence and inform purchasing.

Key features of the Impact Service include:

» **Neutrality:** Should serve as the ‘Switzerland of publishing’. Meaning it will be independent, collaborative and have no one defining metric

» **Openness:** Available to all, includes variety of data from citations (and bibliometrics more generally), social media and sales etc, and allow the re-use of data as much as possible

» **Learning:** Is open about its limitations and the metrics it users, and seeks to improve its understanding of users and the academic and societal impact of the monograph

**Next 3 – 6 Months**

Undertake requirements gathering with academics and researchers, and explore:

» What data/services are currently available

» Existing impact services

» Cost/benefit analysis

Design a process for rapid prototyping, testing and iteration based on feedback with users.

Develop functional requirements for database (including development of APIs to provide data to interfaces) and rapid development of interface prototypes.

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**Measuring the impact of monographs**

**Timescales:** 8-12 months  
**(to initial prototype)**

**Risk:** Medium ++

**Potential budget:** Medium ++
3. A Shared Monograph Publishing Platform

Enabling experimentation with formats and models

A shared, open publishing platform that enables innovative, low-cost approaches to academic monograph publishing by moving the management and production of monographs online and helping improve their quality and impact.

Key features of the publishing platform include:

» **Flexible dissemination:** Open access will be the default standard, with the platform enabling added value services to be developed along with flexible pricing structures and multiple access modes

» **A focus on impact:** The platform will focus on producing a quality process and product responsive to shifts in academic drivers (for example, promotion criteria) and with enhanced metrics. It will work with Google Scholar, discovery solutions and other systems and services to improve indexing and discoverability

» **Sustainable:** As an open source solution it will help lower the threshold for publishing monographs, enable greater experimentation with new business models and testing what is possible

**Next 3 - 6 Months**
As part of a new Jisc project, the task is to gather requirements from researchers and academics, libraries and publishers to:

» Collect evidence from similar initiatives/pilots

» Investigate academic buy-in and the outcomes of the HEFCE expert reference group on monographs and open access

» Explore costs of different models

» Understand the impact on readers/users

Work with institutional partners, academics and publishers to investigate existing technical prototypes and services, to both learn from and potentially build upon.

**A shared monograph publishing platform**

**Timescales:** 12 – 18 months
(to initial prototype)

**Risk:** Medium ++

**Potential budget:** High +++
4. New Monograph Business Models

Testing and piloting new business models for the benefit of research

This project will work to establish the criteria and potential for new monograph publishing business models by building on the experimental objectives of the shared publishing platform to pilot, where appropriate, existing initiatives and experiments around the monograph business model, and by developing and piloting its own innovative models.

Key features of the new monograph business models include:

» **Maximise impact and reach:** The approach of the work will have an enshrined remit of social responsibility and making publicly funded research available to all

» **Sustainability:** Recognise and explore the variety of potential business models, while keeping a focus on open access business models in particular

» **Delivering value for money:** Delivers value to the stakeholders involved. This is important given the importance of the student experience and increasing cost of student fees

**Next 3 – 6 Months**

» Explore existing ideas and models initially: assess the outcomes of current work and experiments in this area as models that might be built upon

» Engage with a number of publishers and presses to begin exploring new models and opportunities

» Undertake research and explore the actual demand for monographs: analyse the potential for different approaches including, for example, print on demand

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**New Monograph Business Models**

**Timescales:** 12 months  
**Risk:** High +++  
**Potential budget:** Low +
5. A National Digitisation Strategy

Building a national digital research collection

A national strategy informed by and developed in conjunction with the monograph knowledgebase, that:

» Has a national collection management approach (providing access to, and preserving the national collection)
» Undertakes analysis and prioritises collections for digitisation
» Defines and helps enable digitisation infrastructure/services
» Sources and secures funding

Key features of the digitisation strategy include:

» **Collaborative:** Work closely with key stakeholders, libraries and sector bodies, and in particular publishers, presses and the various initiatives currently taking place in this area
» **Consultative:** Work with key stakeholders to consult on potential business models, including the possibility of public/private models

**Strategic:** Clearly define the benefits of a strategy and ensure a focus on local opportunities, such as the de-duplication of effort

Next 3 - 6 Months

» Undertake an analysis and establish the scope of the current digitisation corpus, this will include working with existing initiatives in this area (both UK and beyond)
» Begin discussions with potential funders and partners
» Work with potential partners to develop and consult on a draft strategy

**Digitisation strategy**

- **Timescales:** 6 months (to draft strategy)
- **Risk:** Low +
- **Potential budget:** Low +
A license negotiated by a third party on behalf of the UK academic sector for access to digital scholarly monographs, to improve access for researchers and students and reduce management overheads for publishers and libraries.

Key features of the national license include:

» **Providing a voice**: Represents a collective voice for the academic community to ensure the needs of teaching, learning and research are effectively communicated and achieved

» **Visible**: Providing a collective voice also gives the license a high level of visibility and recognition

» **Collaborative**: This also implies bringing together and building on existing license negotiation activity around monographs

» **Evidence-based**: Gathers intelligence and evidence to help inform new models and approaches that are trusted by publishers

Next 3 months

» Work with Jisc Collections and other relevant stakeholders to develop the requirements for the license

### New Monograph Business Models

- **Timescales**: 12 months
- **Risk**: High ++
- **Potential budget**: Low +

6. A National Monograph Strategy Roadmap

**A nationally negotiated agreement for digital monographs**

**License**

- Improved access
- Reduced overheads

**Increased NSS score**

**Book budget**
7. A Systemic Changes Think Tank

Providing foresight and insight into the monograph’s future

A high-level, international ‘think tank’ providing a systematic view across the disparate parts of the scholarly communications/monograph landscape.

Key features of the think tank are that it will be:

» **Credible**: The think tank will ensure it includes the right members and stakeholders with authority in their respective organisations. It will also include ‘disruptors’, which would include members from technology and commercial organisations, for example

» **Holistic**: It will have a remit to provide an overview of the disparate areas that make up the scholarly monograph and wider scholarly communications landscape. This overview will include helping improve communication between these separate parts

» **Managed (Curated)**: The group will be facilitated and managed so that it is an active group which undertakes research and other activities. The group may also form an independent, but key part of the NMS project’s governance structure to ensure resilience and foresight in the development of infrastructure and services

» **Self-funding**: Membership, and the group’s activities, will be funded by members, and all membership will be time-limited

**Next 3 months**

» Undertake an environmental scan. What groups already exist? Who’s doing similar things?

» Begin to sketch out the purpose, aims and governance for the group in more detail

» Begin to canvass the opinion of possible members and interested parties and work with them to flesh out how such a group might work

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**Systemic Changes Think Tank**

*Timescales*: 6 months

*Risk*: Low +

*Potential budget*: Low +
This roadmap also provides a challenge to you. In fact, it presents you with two challenges:

**What have we missed?**
We have worked with over 60 people from publishing, libraries, researchers and academics, sector bodies and funders (both from the UK and US) directly through the project workshops and expert advisory panel. We have also used the project blog to engage a far larger number of people as the project progressed, posting our outputs and asking for feedback and comments.

But we realise that our view of the world may be different to yours.

Please share your feedback with us [jisc.ac.uk/blog/a-new-chapter-for-the-monograph-30-sep-2014](http://jisc.ac.uk/blog/a-new-chapter-for-the-monograph-30-sep-2014)

**Get on board**
To get to this draft strategy took six months. Imagine what we could achieve in another 12 or 18 months. You don’t have to commit to anything. You may want to tell us about something you’re involved in, or simply keep in touch as things develop. Either way, we would welcome your feedback. Contact Ben Showers, the lead for the National Monographs Strategy:

- **Email:** b.showers@jisc.ac.uk
- **Call:** 020 3006 6015
- **Twitter:** @benshowers

Across social media, you can follow the debate and get involved in the conversations using #monographsUK

**This is just the beginning; the real work is about to begin.**
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