

Understanding Open Access eBook Usage: Toward a Common Framework

OAI11
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THE
ANDREW W.
MELLON
FOUNDATION

BISG's commitment to research

- Four primary objectives
- One of two Mellon Foundation grants we are part of in 2018 - 2019
- Additional work may follow



Objectives

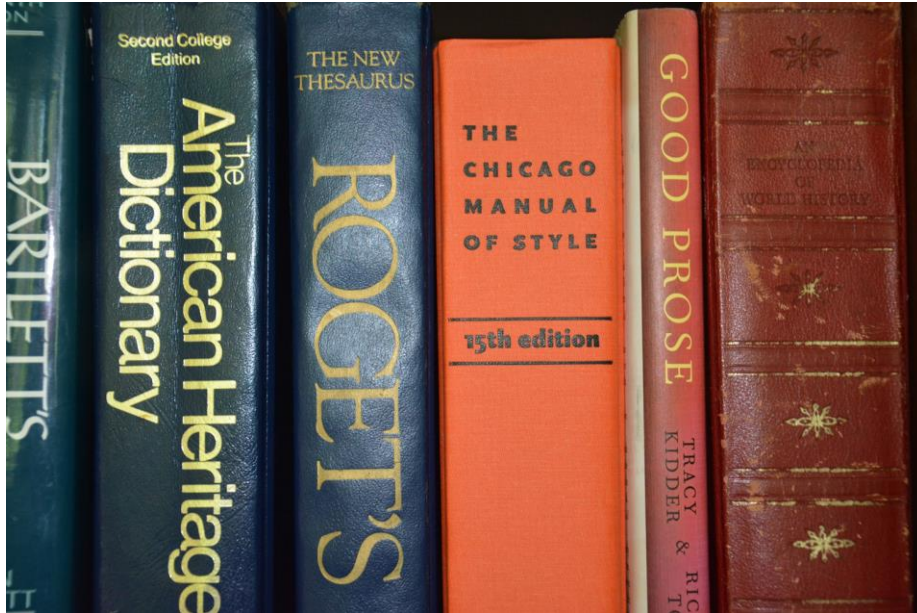
- Structured conversation around usage tracking for OA eBooks
- Understand implementation challenges
- Define opportunities for collaboration
- Create a framework for moving forward
- Ultimately: Make a compelling case for OA book publishing investments

Timeline

- **Spring 2018:** Andrew W. Mellon Foundation commitment
- **Summer 2018/Fall 2018:** Research paper
- **Fall 2018/Winter 2019:** Community consultation/two-day summit
- **May 2019:** BISG white paper with recommendations



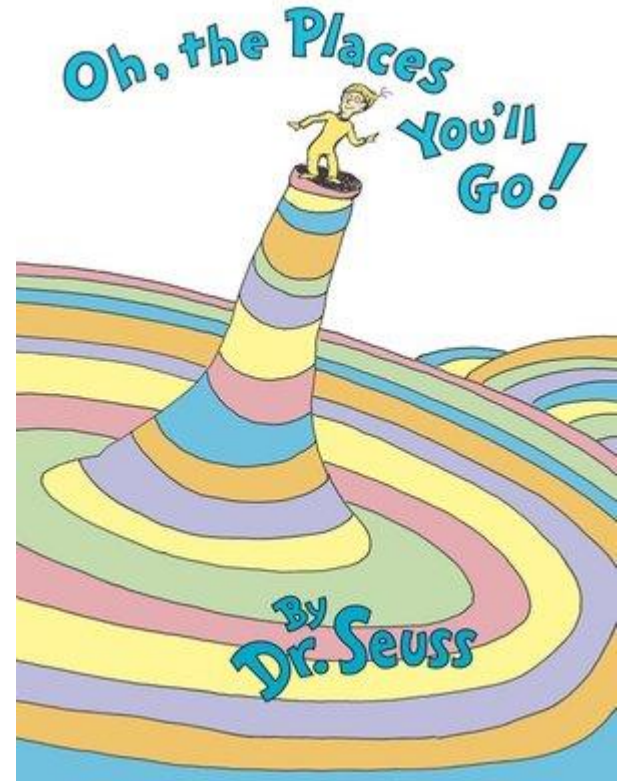
Initial research laid out a shared problem



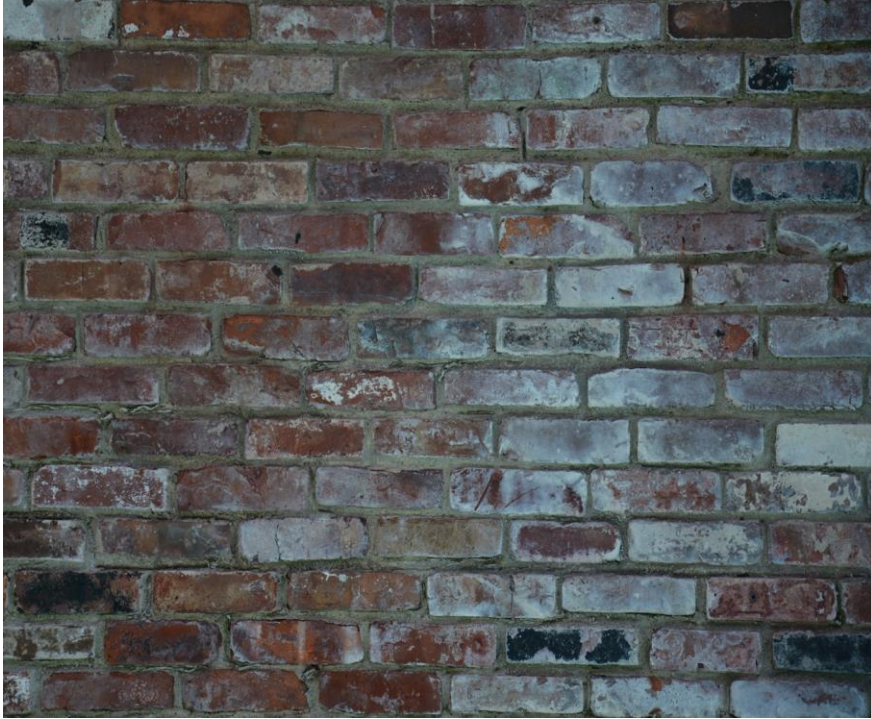
- We want to know more about OA monograph use
- None of us alone has the necessary resources
- We would benefit from coordinating action

Benefits of a data trust

- Provide stakeholders in scholarly communication with strategic insight
- Understand where and how OA book are used
- Provide context (wider patterns and trends)
- Lower the cost of obtaining and processing useful data



White paper recommendations



1. Define governance and architecture
2. Create a pilot service
3. Implement and extend relevant open-source technologies
4. Develop personas and use cases
5. Build engagement
6. Document the supply chain

Governance and architecture

- Multiple alternatives (centralized, federated, decentralized)
- Architecture affects governance and priorities
- Convene an advisory board to evaluate alternatives
 - Commission a focused discussion draft
 - Distribute the draft widely
 - Convene a summit of key stakeholders
 - Decide on a path forward
- Whatever path is chosen, refine during the pilot (and after)

Create a pilot

- Implement the governance model and test priorities
- Contractual components sorted out
 - Data supply, access
 - Use of data
 - Membership eligibility, benefits, termination, etc.
- Advanced skills needed
 - Managing large, evolving data sets
 - Familiarity with OA issues
- Actively engage stakeholders: open, inclusive, balanced

Implement, extend open-source technologies

- Either follow or augment the pilot service
- Collaborative approach, to obtain buy-in and validation
- Tools are available
 - HIRMEOS, Open Book Publishers
 - Experience sharing with JUSP, IRUS
- Develop ongoing partnerships
- Decisions about governance, pilot shape where to go here

Personas and use cases

- Core components of effective design
- Effective filter for defining data types, tools, export features
- U.S. and European experiences
- Research paper and summit discussions inform work here
- Benefits if done in tandem with other recommendations

Engagement across multiple markets

- Initial focus on U.S., European markets
- Important building blocks, but not universal
- Convene focus groups outside of North America/Europe
- Seek understanding, clarity
 - Minimum return required to participate
 - Create use cases that capture unique aspects

Document the supply chain

- Authors, publishers, funders, vendors, libraries, readers
- Each has a role to play
 - Discoverable
 - Relevant
 - Accessible
 - Consumable
- Create a map of the supply chain for OA monographs
 - Identify pain points, understand where data gets “lost”
 - Define a model that supports discovery, access, consumption
 - Identify gaps in the existing framework

Questions/For more information

- White paper: <https://doi.org/10.17613/8rty-5628>
- Initial research paper: bit.ly/monograph-data-trust
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Thank you!