

Understanding Open Access Ebook Usage: Toward a Common Framework

Charleston Library Conference
Friday, November 9, 2018

<http://bit.ly/oausage>



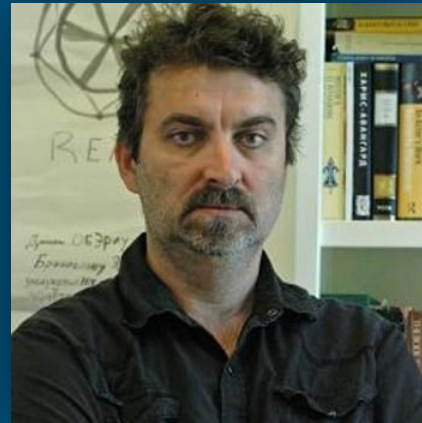
About the Project

Charles Watkinson (U-M)

Branislav Jakovljević

Alienation Effects

Performance and Self-Management
in Yugoslavia, 1945–91



- Winner: Association for Theatre in Higher Education 2017 Outstanding Book Award
 - Unlatched by KU supporters in 2016
-
- Global interest in how dictators exert soft power through art and culture
 - Interdisciplinary reach across East European history, performance studies, Jewish studies
 - Promotion book for the author at Stanford



Alienation Effects: Performance and Self-Management in Yugoslavia, 1945-91

University of Michigan Press

Title usage data report from 2018-01 until 2018-09

2016-07 Usage by Time

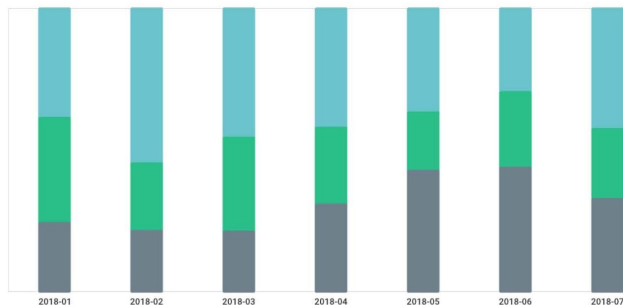
First OA Usage Month

8093

All Time Usages

4459

All Time Investigations



3634

Usage by Country

All Time Requests

102

of Unique Countries All Time

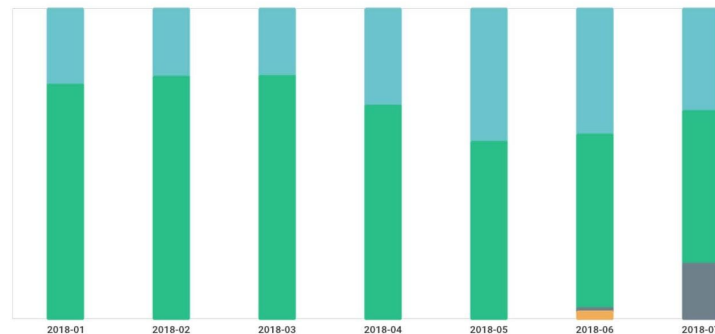
Europe	North America	South America	Asia
United Kingdom 88	United States 332	Brazil 10	India 26
Germany 76	Canada 70	Peru 4	Indonesia 22
Ukraine 43	Mexico 3	Chile 2	China 20
Oceania	Africa		
Australia 31	South Africa 12		
New Zealand 5	Nigeria 7		
Fiji 4	Uganda 5		

Alienation Effects: Performance and Self-Management in Yugoslavia, 1945-91

University of Michigan Press

Title usage data report from 2018-01 until 2018-09

Usage by Platform



Usage by Metric / Platform

Total Item Investigations	Total Item Requests	Unique Title Requests
jstor 629	jstor 406	oapen 476
project-muse 82	project-muse 64	fulcrum 8
	fulcrum 12	bibliolabs 3
		ebsco-host 1



University of Michigan Press

Generate a Report

Report

Titles

My Account 👤

Log Out 🚪

Platforms

PROJECT-MUSE OAPEN JSTOR EBSCO-HOST FULCRUM BIBLIOLABS

56
TITLES

17065
USAGE

Collections

Date Range

Title Parameters

Location

Generate

File Home Insert Page Layout Formulas Data Review View Acrobat Tell me what you want to do... Sign in Share

Normal Page Break Preview Page Custom Ruler Formula Bar Gridlines Headings Zoom 100% Zoom to Selection New Window Arrange All Freeze Panes Split Hide Unhide View Side by Side Synchronous Scrolling Reset Window Position Switch Windows Macros

B14

	A	B	C	D	E	F
1	Title Platform Report					
2	University of Michigan Press, ISNI ID: 0000000090011168					
3	Knowledge Unlatched - KU Open Analytics					
4						
5	Title	ISBN	Platform	Metric	Compliance	Total
6	Alienation Effects	9780472053148, 9780472900589, 9780472121984, 9780472073146	oopen	unique_title_requests	counter-4	38
7	Alienation Effects	9780472053148, 9780472900589, 9780472121984, 9780472073146	oopen	total_item_investigatio	counter-4	43
8	Alienation Effects	9780472053148, 9780472900589, 9780472121984, 9780472073146	oopen	total_item_requests	counter-4	19
9	Alienation Effects	9780472053148, 9780472900589, 9780472121984, 9780472073146	project-muse	total_item_investigatio	counter-4	35
10	Alienation Effects	9780472053148, 9780472900589, 9780472121984, 9780472073146	project-muse	total_item_requests	counter-4	33
11	Alienation Effects	9780472053148, 9780472900589, 9780472121984, 9780472073146	fulcrum	total item requests	counter-5	3
12	Alienation Effects	9780472053148, 9780472900589, 9780472121984, 9780472073146	fulcrum	unique title requests	counter-5	2
13						
14						
15						
16						
17						

Notes Title Platform Report Title Country Report

Objectives

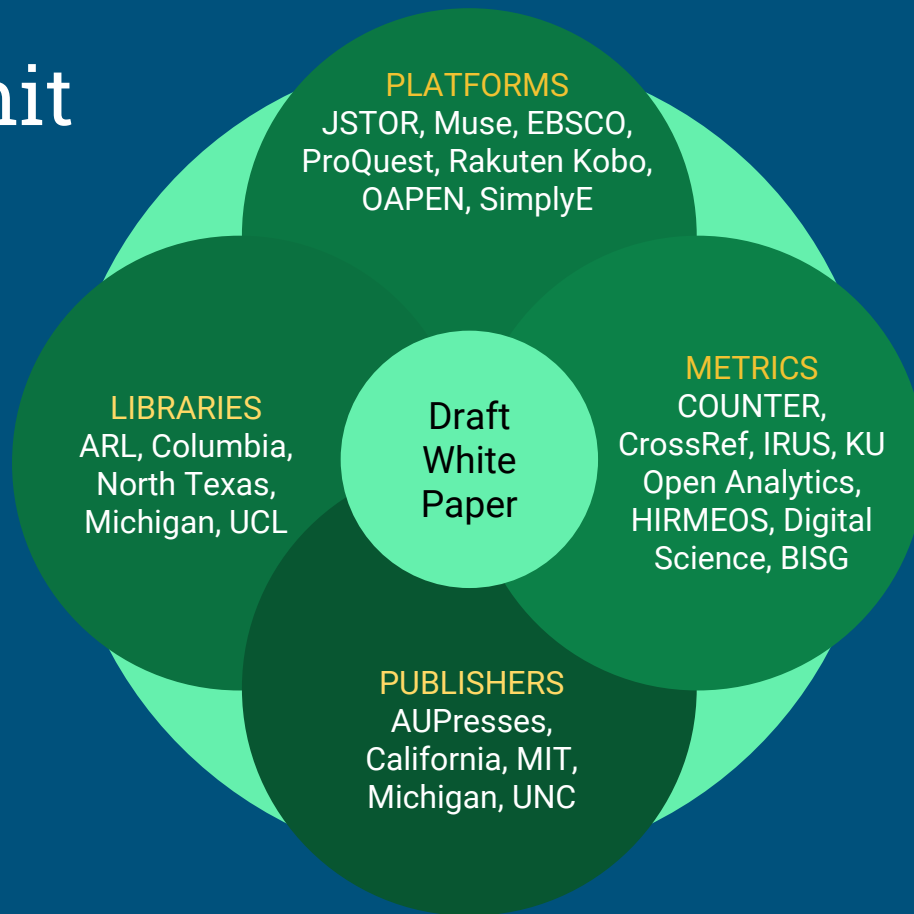
“Understanding Open Access Ebook Usage: Toward a Common Framework”
Project aims to . . .

- Create a structured conversation around usage tracking for open access ebooks
- Understand implementation challenges
- Define opportunities for collaboration
- Define a framework for moving forward
- Ultimately: Make a compelling case for investment in OA book publishing

Timeline

- Book Industry Study Group (BISG) collaborating with KU Research, universities of Michigan and North Texas, Educopia Institute
- Spring 2018: Andrew W. Mellon Foundation funds planning exercise
- Summer 2018 / Fall 2018: KU Research prepared a draft white paper providing landscape review and outlining data trust concept
- Fall 2018 / Winter 2019: Community consultation around white paper culminating in an invitation-only summit in New York (December 3-4)
- Spring 2019: BISG publishes final white paper including recommendations for next steps

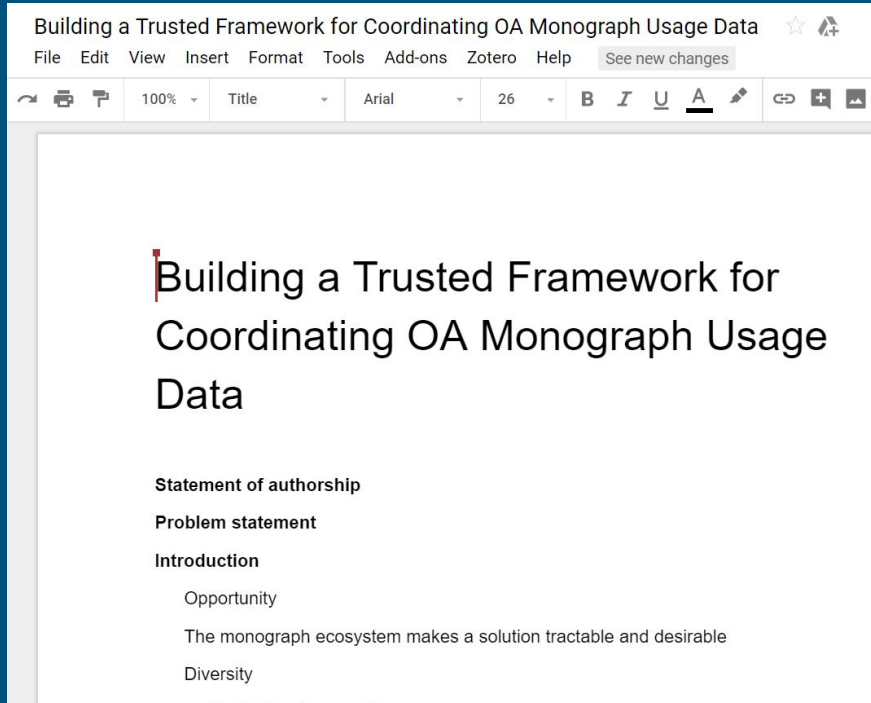
NYC Summit



Our Team

- Brian O'Leary, Executive Director, Book Industry Study Group
- Kevin Hawkins, AD, Scholarly Communication, University of North Texas Libraries
- Lucy Montgomery, Director of Research, KU Research
- Cameron Neylon, Executive Director, KU Research
- Katherine Skinner, Executive Director, Educopia Institute
- Charles Watkinson, AUL, Publishing, University of Michigan Library

Request for Comment



The image shows a screenshot of a LibreOffice Writer document. The title bar reads "Building a Trusted Framework for Coordinating OA Monograph Usage Data". The menu bar includes "File", "Edit", "View", "Insert", "Format", "Tools", "Add-ons", "Zotero", and "Help". The status bar shows "See new changes". The document content is as follows:

Building a Trusted Framework for
Coordinating OA Monograph Usage
Data

Statement of authorship

Problem statement

Introduction

- Opportunity
- The monograph ecosystem makes a solution tractable and desirable
- Diversity

<http://bit.ly/monograph-data-trust>

<http://bit.ly/data-trust-survey>

How does OA ebook usage data work today?

Kevin Hawkins (UNT)

E-journals vs. ebooks

E-journals are usually delivered through the publisher's website.

Ebooks are usually delivered through website of intermediaries:

- Library providers: *EBSCO, ProQuest, JSTOR, Project MUSE*
- Direct-to-consumer retailers: *Rakuten Kobo, Amazon Kindle, Google Play*

Other sources of usage data

- Authors or their publishers sometimes make one or more versions of an ebook available online separate from the usual distribution channels. There might be usage data from:
 - author's personal website
 - a self-service platform like Figshare, Academia.edu, or ResearchGate
 - an institutional repository
 - a digital library system
- The publisher might choose to distribute the work through channels specifically for OA content, such as the OAPEN Library, and if the work is openly licensed, third parties such as Unglue.it and the Internet Archive might distribute their own copies of the work.

How are ebooks used?

OA ebooks as part of the whole information supply chain

Brian O'Leary (BISG)

Four questions to address

- What is a supply chain?
- What is an information supply chain?
- How do physical and digital supply chains differ?
- What implications do these differences present for OA ebooks?

What is a supply chain?

- Network organized to create, manage, and distribute a product
- Often represented by the steps taken to get a product to a consumer
- Meet demand with the most effective use of available resources
- Typically optimized for something
 - Cost (e.g., cheapest delivery)
 - Speed (e.g., fastest to market)
 - Value (e.g., protecting the quality of a good; exclusive access)
- Exchanges are typically financial (sales price, margin, etc.)

When price is a proxy for value

- Publishers set a price based on market understanding
- Investments (including author payments) are based on expected sales
- Distributors and retailers take a share of the sales price
- Risk is managed through operational agreements
 - Royalties vs. advances
 - Returns

What is an information supply chain?

- Map of how information is created, managed, and reported (shared)
- Tied to business processes
- Includes both financial and operational data
- Ideally, one shared data model
- More typically, agreements on what information is shared and how
- Because it's "under the hood", can be complex

How do these supply chains differ?

- Physical supply chains are built around scarcity
 - Constraints on inputs
 - Desire to keep inventory low
 - Price as a way to align supply and demand
- Digital supply chains are not constrained by scarcity
- Challenge shifts from managing assets to managing (shared) data
- Traditional supply chains aren't built to readily share data beyond sales
- So, digital partners silo data, working to figure out what matters

Implications for OA ebooks

- Currently, no shared proxy for value
- Partner compensation can no longer be a function of price
 - No longer clear what's "fair"
 - Affects willingness to participate in the supply chain
- Burdens shift: Risk management options no longer apply
- Silos for analytic data challenge the development of effective OA models
- Need a value-based model that spans the supply chain

The concept of the data trust

Katherine Skinner (Educopia)

What do we mean by a “data trust”

cooperative organization to address scholarly publisher, library, and related needs in the collection, validation, aggregation, normalization, and dissemination of usage data

Features of the data trust

- Repository of data about OA Books and their use
 - Framework for collecting, normalizing, aggregating, and maintaining
 - Well documented pathways and workflows for data access and use
- Organization with legal responsibility for data
 - Community/Member-governed entity
 - Multi-stakeholder empowerment
 - Oversight responsibility
- Standards-making (and keeping) responsibility
 - Fair/equitable access
 - Data ethics laboratory

Questions the data trust will resolve

How can information be collected?

How can data be contributed?

How can data be normalized?

How can data be stored?

How can data be curated and preserved?

How can information be shared and used?

What are the terms of use (and are they different for different members)?

Who can see which parts of the data?

How can aggregated data be accessed and used?

Who can build services on the data (and how)?

Thank You

<http://bit.ly/monograph-data-trust>

<http://bit.ly/data-trust-survey>