

Bibliographic Data Services and the National Monograph Strategy – Next Steps

Purpose

This paper summarises the recommendations of a recent report produced by Sero Consulting & Associates that was commissioned (by Jisc) to examine the implications of pursuing specific bibliographic data strategies. The full report is available on request and it reflects input from **representatives of** RLUK, SCONUL, the British Library and others. It also sets out a brief response to the report from Jisc and some proposals for immediate next steps.

The Bibliographic Services Implications (BSI) Study – Key Points

- The next phase of Jisc investment should focus on delivering bibliographic data services (BDS) and building and sustaining relevant partnerships rather than focusing on the challenges and constraints of delivering Copac as a Jisc service.
- The primary focus of future effort should be on supporting UK academic libraries with collections management. Resource discovery and records delivery are of secondary importance
- There is a fundamental need for a ‘Monobase’ to drive a range of required functions and the current (and likely future) level of investment in Copac will not deliver the type and scale of data and functionality that is required
- At least 4 leading commercial library service providers have a demonstrable interest in delivering the sorts of frontend, backend or value added services that would meet library needs and the objectives set out in the National Monograph Strategy (NMS) Roadmap
- The Monobase will consist of an aggregated database and its management should be outsourced to an organisation that is capable of delivering the service as core business at scale
- Jisc BDS should contribute to the Monobase aggregation (as a ‘sub-aggregator’) and/or assume the role of ‘systems integrator’ to facilitate easier interactions on the part of UK HE libraries with one or more vendors
- Jisc BDS will have an important continuing role to play in: expanding the UK base of libraries that contribute data; building value added services on top of the Monobase (e.g. tools, interfaces, user support); and ensuring that data is openly shared with all relevant organisations that promote discovery
- As an essential principle, all metadata records that comprise the Monobase should be openly available and reusable under a CC0 license
- Delivering an open records supply service (i.e. an open version of the RLUK database as it is currently configured) should be achievable as a by-product of maintaining the Monobase, particularly if open licensing can be applied to the data
- The route to greater impact for contributed library data is through exposure to global search engines and other high impact web-scale channels rather than through reliance on Jisc-funded discovery interfaces
- The Monobase should combine knowledge about both digital and print publications for services to be efficient and effective
- The direction of travel set out in the report has met with strong endorsement from both RLUK and SCONUL and has met with approval from the British Library. Subject to input from

the forthcoming Library Support Services report (due at the end of October) Jisc should now progress towards an actionable plan rather than to further consultation

Jisc Response to the Report

The report took shape in quite close collaboration with the Jisc manager responsible for commissioning the work and the outcome is complementary to earlier discussions of the Bibliographic Data Roadmap Group. The key recommendation (to enter into a negotiated procurement to realise a Monobase for UK F/HE) sets out a clear path and is a welcome breath of clarity in an area of work that is impeded by dependent and overlapping drivers and constraints.

The principle qualification that we would make on the report's recommendation is that it is important to remember that not only does Jisc currently deliver value to UK F/HE through its bibliographic services; but also that this value is acknowledged by vendors who may well be happy to supply services on a *quid pro quo* basis rather than for a fee. This will need to be factored into any negotiated procurement exercise.

The findings of this report (which principally focuses on the concept of the 'Monobase' and the data required to constitute it) also need to be joined up with other concepts set out in the NMS Roadmap, namely: discovery of and access to digital surrogates; and a national licensing framework for monographs. Additional work has been undertaken by Jisc staff on these topics over the last six months and this needs to be factored into the next stage of discussion and planning.

Proposed Next Steps

1. To make the full BSI report available to the following groups and organisations:
 - RLUK Board
 - SCONUL Board and the SCONUL Collaborative Services Working Group
 - The Bibliographic Data Roadmap Group
 - The Copac Collections Management Board
 - The British Library
2. To convene a steering committee to oversee and own the direction and implementation of the next phase of work. The Bibliographic Data Oversight Group (BDOG) will be facilitated by Jisc and representatives from RLUK, SCONUL and the British Library will be invited to form the core of the group. Others (e.g. HEFCE) could be invited to join in accordance with the Terms of Reference agreed by the core members
3. To continue to foster a productive working relationship with third-party and vendor organisations (e.g. OCLC) by sharing the broad conclusions of the report and the expectations of stakeholders
4. To increase the Jisc staff resource employed to aggregate UK library data into Copac. This will provide more capacity to undertake outreach and engagement to libraries and to provide technical ETL (extraction, transformation and loading) services. Further capability will be sought within Jisc to advise on system integration/architecture requirements for inclusion in the procurement specification for the Monobase.
5. To draw up a detailed draft action plan (including a communications plan) for discussion at the first BDOG meeting which should be scheduled a.s.a.p. (possibly late October/early November?)
6. To continue to develop parallel plans for pilot projects looking at digital access and licensing issues (in response to the NMS Roadmap) and to incorporate these ideas into the action plan for discussion at the BDOG meeting.