THE ACADEMIC BOOK OF THE FUTURE

Michael Jubb

Academic Books and their Future

June 2017
A Report to the AHRC & the British Library

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This report, Academic Books and Their Future, written by Dr Michael Jubb, is one of two final outputs from the Arts and Humanities Research Council/ British Library Academic Book of the Future Project, (2014-16) and explores the policy perspectives of this important issue. It forms a companion to Professor Marilyn Deegan's Academic Book of the Future Project Report. The two reports complement each other, and reflect the wide set of communities and contexts the Project engaged with, highlighting positive collaborations, creative solutions and business models, and ongoing research tackling the tensions that surround academic book production, dissemination, consumption, and conservation.

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Preface

1. This document is one of the key outputs of the AHRC/British Library Academic Book of the Future Project, a two-year research project undertaken by a core project team from University College London and King's College London, with support from Dr Michael Jubb, who has drafted this report. The project focuses on academic books in the arts and humanities, and was commissioned at a time of unprecedented challenge for such books, not only in the UK, but across the world: technological developments bringing changes in the activities and processes involved both in research and in publication; new forms of research outputs and dissemination; and new economic and political pressures. Our aim in the project was to examine these issues in depth, and to investigate what they might presage for the future. We did so with the active support of a rich array of partners: representatives of the many different groups who have a stake in the future of academic books. Indeed, one of our key findings is quite how broad that range of stakeholders is, and how intricate and multi-faceted the relationships and interactions between them are. Complexity is an undeniable feature of the academic books ecology in the arts and humanities.

2. Our project benefited from extraordinary levels of enthusiasm and engagement from across the highly-diverse academic book community, and we are extremely grateful to all those who contributed their time and expertise, and made the project much more than it would otherwise have been. It is clearly impossible for a single report—even a rather lengthy one—to cover in anything like comprehensive fashion the full range of findings from the huge range of events over the past two-and-a-half years, and the many different ways in which questions about the current and possible future states of academic books were raised and interrogated; or indeed fully to reflect all the reports and developments since the project was initiated late in 2014 that are

relevant to academic books and their future. The project website (academicbookfuture.org) acts as a repository for a wide range of resources arising from the project, along with BOOC, the project's experimental publication with UCL Press. And a separate Project Report (Deegan, 2017) aims to provide a narrative of the project's key activities and outputs.

3. The aim in this report is to provide an account of perspectives from three key stakeholder groups—publishers, libraries, and intermediaries in the supply chain for academic books—and to highlight some key issues that arise from those different perspectives. A central set of perspectives is of course missing here, that of the members of the academic community who constitute the overwhelming majority of authors and readers of academic books. There is no single set of such perspectives, of course, and the project has gathered detailed evidence from junior as well as senior researchers in a wide range of subjects and disciplines, from literature and history to medieval studies, cultural and media studies, art history and many others. A full account of their views and interests, and the activities of scholars in different disciplines, has been provided in the Project Report, and need not be repeated here. Nevertheless, such perspectives are reflected in the discussion of key issues and themes presented in this report.

4. The wide range of perceptions and views has indeed been one of the key features of the project. And one of its key achievements has been to create new levels of dialogue between the different communities and stakeholders involved with academic books in the arts and humanities, evidenced not least in the establishment of Academic Book Week. We hope that this will provide a firm foundation on which those communities can continue to work together in the future.

5. More particularly, this report reflects the commitment of large numbers of people and organisations. Thanks are due in particular to the AHRC and the British Library for initiating and funding the work we have undertaken; and especially to Mark Llewellyn, Andrew Prescott, and Paula Rothwell (AHRC) and Maja Maricevic (British Library) for their support. We also enjoyed the support of an Advisory Board, whose chair, Kathryn Sutherland, was unstinting in her encouragement and advice throughout the project; and a Strategy Board appointed by the funders and chaired by Anne Jarvis. Many other individuals and organisations helped in organising and reporting on events, providing information and advice, and undertaking research for us.

6. More particularly, the project owes its success to the team led by Samantha Rayner at UCL, along with Marilyn Deegan, Simon Tanner, Nick Canty, and Rebecca Lyons, with support from Kate Griffiths and Marcel Knöchelmann. I have learned huge amounts during this project, and I could not have done so without their support. And on a personal level, Richard Fisher—a member of the Advisory Board whose contributions to the project went far beyond what could reasonably have been expected—taught me more during the course of this project than he will ever know; and his support during the drafting of this report has been generous to a fault. Many thanks to them all.

Michael Jubb

March 2017

Executive Summary

Books and their importance

7. Monographs, edited collections, critical editions, and similar kinds of books are of fundamental importance to the arts and humanities. They form the basic infrastructure through which researchers and scholars create and transmit the knowledge and understanding which lie at the heart of those disciplines, and sustain them in vibrant health. But the books of the past must be constantly built upon and sustained with new titles. Arts and humanities academics are of course aware of how their engagements with books are very different from those of their colleagues in other disciplines; and of how books, like other features of the arts and humanities, do not fit easily into policy and strategic frameworks designed in the main for STM disciplines.

Communities of the book

8. Academic books function in a complex international ecology involving individual researchers, universities and research institutions, funders and policy-makers, publishers, libraries, and other intermediaries; varying practices and expectations from all those players; and changing technologies and services from a range of providers, including some (Google and Amazon among them) whose interest in academic books is at best marginal. There are significant geographical differences—between, for example, the UK and North America—and change in any part of the ecology can have profound implications elsewhere. Hence the importance of developing a clearer understanding of the relationships between the interests and behaviours of the different players.

'Books' and 'publishing'

9. Much of the discourse about 'books' is still trammelled by concepts of the physical codex. But there are now possibilities to focus more on

the different kinds of large-scale outputs already being produced in the digital humanities; or on presenting complex arguments and data in ways designed to render them digestible to a variety of non-specialist as well as specialist audiences.

10. But we must also consider what is meant by 'publishing '. Publishing is in one sense now easily achieved by anyone with access to the internet. But publishers perform a wide variety of functions—commissioning and selection, quality assurance, editorial support, design, production, sales, marketing, distribution, copyright protection and so on—with varying amounts of effort devoted to each of them. A key issue for the future is precisely what publishing services are needed, at what level, and the benefits to be derived from them, for different kinds of 'book'—digital or print, multimedia, interactive, or flat text-only—for different purposes and for different kinds of audiences. Clarity on these issues—including, for example, whether a print book should be produced as a matter of course in all cases—might help to clarify also some current questions about how the costs of the different services might best be funded.

Supply and demand

11. There is a dearth of comprehensive and reliable data on supply and demand for academic books. But evidence from the Publishers Association, Nielsen, and a range of other sources makes it clear that while the number of titles published annually—especially in the UK—has increased in the last decade, sales have not kept pace, and sales per title have therefore fallen significantly. The incentives for authors to produce traditional kinds of books are strong, arising from perceptions of the weight given to such books in assessments of the qualities of individual scholars and departments. They are often seen as key to the development of a scholarly reputation, and thus to career progression; and to high scores in assessment exercises such as the REF. There are incentives also for publishers to maintain their

output of titles, as they seek to sustain their reputations by building strong lists in relevant subject areas; and to spread risks and overheads. The result is that, in many of the major disciplines and sub-disciplines in the arts and humanities, more titles are published than even the most assiduous scholar could hope to read. And with library budgets for book purchasing at best static in real terms, and retail sales declining, the business case for the publication of individual titles is often now based on print sales per title of 200 or fewer. Further falls will call into question the case for publishing individual titles, and indeed the value and viability of the whole book publishing enterprise. Nevertheless, the perceived incentives for academics to publish monographs are so strong that only concerted action by all stakeholders, and at senior level, can begin to address the problems they are now generating.

Publishers and their roles

12. The academic book publishing landscape, and the dominance of a relatively small number of commercial publishers and university presses, has changed relatively little in recent decades. But UK arts and humanities academics submitted to the 2014 REF exercise books from nearly 1,200 imprints, and it is clear that many smaller publishers play critically important roles within particular subjects or fields. Larger publishers are conscious of how their roles and their value are increasingly being called into question and of the need to enhance their roles as providers of high-quality content in a digital world where content 'wants to be free'. University presses in particular—both the established ones and those newly-launched in the UK—must seek to ensure that their strategies are closely aligned with those of their host universities, with effective support for research from inception to publication, and for innovative models of scholarly communication. Publishers both large and small are also aware of the risks if they get too far ahead of their academic audiences in seeking to respond to and stimulate change; and many

smaller publishers in particular are under-capitalised and lack the resources to take full advantage of digital technologies. But active engagement with new technologies is essential in order to meet the needs of different kinds of content produced for different purposes.

Commissioning and contracts

13. Academic books—unlike most journal articles—are commissioned, and the work of commissioning editors is fundamental to the viability of all publishers. That primary editorial function has changed little over the last twenty years, although commissioning decisions within publishers are now sometimes more collaborative than in the past. Publishing rests on contracts under which authors either grant an exclusive licence to publish, or assign copyright to the publisher. Rights and their protection and exploitation, are at the core of publishers' business, and they must take great care over the rights they acquire, and how they manage them. But for most academic authors, the scholarly and professional rewards that flow from publishing a book are much more important than any income from fees and royalties. Hence some are reluctant to transfer rights, or to restrict access to their work in any way; and this can bring tensions between authors, funders and publishers. Meanwhile, the business of acquiring and managing third-party rights is becoming more complex.

Physical print and e-books

14. The digital revolution has not led to the wholesale adoption of digital formats as it has, largely, with scholarly journals. Reader preferences remain strongly in favour of print rather than e-books. Print therefore remains dominant, and digital printing—especially print-on-demand—has so far probably had a greater impact than e-books on the publishing landscape. Publishers therefore continue to provide both print and e-books in a range of formats; and the major sales and use of e-books are via libraries, for whom e-book packages

and new procurement models offer significant advantages. The unresolved problems for publishers and other agents in the supply chain are that they operate with a dual cost base, and that e-book sales tend to cannibalise print sales. The result is pressure on margins and on overall revenues, and added complexity in the supply chain. Preservation of e-books for the long term is also not yet fully-resolved.

15. Relatively few attempts have been made so far to exploit the potential of new technologies to challenge existing structures of scholarship; rather, the focus has been on replicating existing scholarly models. But some members of the digital humanities community are keen to produce new kinds of books, with extended texts, narratives, ideas, and arguments produced in new ways, with dynamic and interactive images, graphics and sounds; links within the text and to external sources; and facilities for updating and annotation. The few examples of such books to date have been time-consuming and costly to produce, using non-scalable bespoke processes. There are thus significant barriers to widespread adoption and to significant investment by publishers. None of the barriers is insurmountable, but grant funding may be needed to reduce them, along with support from all major stakeholders to address the organisational and technical challenges.

The supply chain

16. The supply chain for academic books operates in a context almost the mirror image of that for journals: tens of thousands of unique titles in frontlists and backlists; absence of repeat orders; retail as important as institutional sales; low volumes of sales for the vast majority of titles; and the continuing dominance of print alongside a range of digital formats. The array of intermediaries in the chain, their roles, and the relationships between them are complex and bring frustration on all sides. Some publishers and others argue that

current structures should be radically reconstructed to fit better with changing needs; and there is widespread demand for improvements in interoperability and data exchange, simple but flexible workflows, reductions in stock holding, and improved support for digital content. The multiplicity of titles, publishers, and intermediaries—and tensions between them—makes that a difficult challenge.

17. The roles of different players in enhancing discoverability, demand, sales and access are difficult to disentangle, with negative effects on efforts to turn potential into effective demand. On the retail side, the range of titles held by booksellers has diminished, which has almost certainly helped to depress demand. On the library side, the availability of large-scale aggregations of e-books, and the development of demand-driven and evidence-based acquisition (DDA and EBA) models, along with short-term loan models and approval plans, have brought major changes in patterns of collection development and the relationships between libraries and library suppliers. The many variations in terms associated with those models, and the frequency with which they have been modified, have brought new tensions, and difficulties for all parties in adapting to new circumstances and judging what works best.

Discoverability

18. Seeking and retrieving information about books is often confusing and frustrating. Metadata quality is variable at best; and metadata typically generated to support the retail trade under the ONIX standard is very different from the MARC records required by libraries. Hence there is a need to increase the range of metadata provided as a matter of course, with more information about the contents of chapters and sections, about authors, and about reviews and social media comments; and for schemas that cope better with works that cross traditional subject and disciplinary boundaries. But

publishers, booksellers and libraries also need to invest more in learning about how different categories of readers and purchasers—scholars in different disciplines, as well as students and interested members of the public—operate in online environments, and in improving search and navigation tools to maximise and transform discoverability. More standardisation of the features provided by aggregator and publisher platforms—for whole books and for individual sections—would also be welcomed by users.

Open access

19. OA for books has the potential to bring real benefits in widening the reach and the impact of academic books: making scholarly communications work more effectively in the interests of academics both as authors and readers, of funders and of the wider public. Funders and policy-makers—especially in the UK—are becoming more interested in promoting OA for books; and this trend will continue. They are also aware of the challenges that have as yet prevented a more pronounced move towards OA, including costs, authors' behaviours, rights regimes, and the complexities of the international ecology.

20. There is no consensus on the way forward; or even on whether marching towards OA is the best way to proceed. But none of these barriers is insurmountable, and there is a vibrant set of initiatives exploring the possibilities, and opening up new opportunities. They operate as yet at small scale: some show significant promise, but none has yet passed the test of scalability. Active dialogue and engagement across all stakeholder groups is essential if we are to move forward effectively. We therefore endorse the OAPEN UK project's recommendations to stimulate some quick wins as well as longer term goals; and the need for dialogue, collaboration, informed decision-making, and rigorous evaluation of change, in order to

ensure it does not undermine the existing strengths of monograph publishing.

Conclusions

- The academic books ecology—in the UK as in the rest of the world — has changed significantly in the past two decades, but there are clear signs of strain in the relationships between different stakeholders. In order to sustain the ecology in continuing good health, further change is needed, based on a clear understanding of the dependencies—and the tensions—in the eco-system. In that spirit, we highlight some key issues which require detailed attention.
- Communications and relationships. One of this project's major achievements has been the dialogue it has established between representatives of the key stakeholder groups in the academic books ecology. There is still much to be done to build awareness and understanding of the varying perspectives, roles, and interests across the different stakeholder groups.
- Quality. Ensuring that academic books are of high quality is a core concern; the publishing process must continue to involve quality filtering, and self-publication without quality checks should not be encouraged. But further efforts are needed to ensure that all kinds of 'books', including those taking innovative forms, are given due weight in assessments of research performance. And publishers should explore the opportunities for innovation in quality and peer-review processes.
- Supply and demand. The perceived incentives for academics to produce books in traditional form—in order to gain the scholarly credit and career rewards that follow from them—are now so strong that supply risks outstripping demand, in terms both of sales and of readership. This presents dangers to the whole ecology of academic book publishing. Finding ways to reduce the

incentives to produce ever more books will require concerted action at senior level from all stakeholders.

- Systems and processes. Although many of the processes involved in producing, disseminating and providing access to academic books have changed significantly in recent years, systems as a whole remain sub-optimal. The value provided through the various elements in the complex supply chain in particular needs radical attention. Achieving more efficient, flexible, and effective workflows, with a particular emphasis on interoperability and standardisation, will require concerted action from publishers, libraries, and intermediaries.
- Services for authors. Although there are differences between publishers in terms of process and commitment of resources, the package of services they provide for each title—commissioning, quality assurance, design and production, distribution, sales and marketing—has changed relatively little. There is scope for examining whether the same package in its entirety is required for every title and in all circumstances; and whether some 'books' might be 'published' using bespoke sets of services rather than the relatively undifferentiated package provided at present.
- Libraries and books. The roles and strategies of academic libraries are changing, along with their processes and the services they provide to both students and scholars. There is increasing pressure to demonstrate and assess relationships between those services on the one hand and the academic and research performance of their users on the other. E-books can offer significant advantages to libraries, enabling them to provide more titles to more readers at a relatively low price; but there are tensions at present with the preferences of many readers for physical print books.
- Innovation. We have identified many interesting and potentially valuable innovations with new kinds of books

that transcend traditional formats. But optimistic projections over the past two decades of the potential of digital technologies have not as yet brought transformations in forms of long-form scholarly communications that many commentators had hoped. Few books have so far been published that fully exploit the potential of new technologies, and the workflows surrounding them have typically had to be built ad hoc.

- Maximising reach. Academic books—even when highly-specialised—are written to be read by as wide an audience as possible. But demand, discoverability, sales and access are closely intertwined; and enhancing all four of them—especially discoverability and access platforms for e-books—demands collaborative attention from publishers, libraries and other agents in the supply chain.
- Open access. OA has the potential to bring real benefits. But OA books represent as yet a tiny proportion of all the academic books published each year, and there are real and significant barriers in the way of more widespread and rapid adoption, with no consensus on the way forward. None of the barriers is insurmountable, and initiatives in the UK and overseas are together exploring the possibilities; but moving to OA at scale will present many challenges.
- Policy and strategy. The health of the arts and humanities depends on sustaining and developing vibrant scholarly communications, including the provision of books of many kinds and in a variety of formats to meet the needs of authors and readers. In pursuing those goals, policy-makers and funders at all levels must take care to ensure that they understand the interests and roles of all the elements in an intricate ecology, and the need to sustain high-quality services while promoting innovation.

Recommendations

21. In order to take forward consideration of these key issues, our central recommendation is that a formal structure should be established, through a group chaired by a senior and authoritative figure in the arts and humanities community, to enhance dialogue across the different communities of the book, to develop policies and strategies in ways that will secure the confidence of the key stakeholder groups, and to commission further research where necessary.

1. Introduction

22. Concerns about the future of scholarly communications in general, and of scholarly monographs in particular (especially in the arts and humanities), have been debated since at least the 1970s. Such concerns are intimately bound up with anxieties about changes in the higher education (HE) landscape, in academic career structures, in funding models, and in technologies. More particularly, there are concerns about the health of at least some of the disciplines that make up the arts and humanities, and the value attached to them, within and beyond higher education. The messages from policy-makers at all levels across the world in recent years have been sometimes conflicting; but the evidence indicates that many disciplines in the arts and humanities have not benefitted as much as many of the sciences and social sciences from the expansion of higher education. In the UK, for example, Higher Education Statistics Agency (HESA) figures indicate that the proportions of all full-time undergraduates studying history, philosophy, languages (including English) and the creative arts and design all fell significantly between 2004-05 and 2014-15; and there were similar falls in the proportions of all research students who were studying in those disciplines (with the exception of the creative arts, where there was a small increase). There have been similar falls in the proportions of all university-funded academic staff who are employed in humanities disciplines.

23. Further analysis and discussion of the anxieties outlined above would go far beyond the scope of this study. Nonetheless, they provide critically-important context for discussion about the futures for academic books in these disciplines, where teaching and learning, scholarship and research depend so much on the writing and reading of books. Indeed, while it would be wrong to suggest that universities are the sole sources of both supply and demand for academic books, it is nevertheless true that both authors and readers of academic

books are highly concentrated in the higher education sector. Publishers and other agents involved in the creation and supply of academic books thus have an intimate interest in the health of arts and humanities disciplines in the higher education sector across the world.

24. Much has been written over the last four decades and more about the decline in book purchasing by both libraries and individual purchasers; about the rising prices of individual titles; about the perceived difficulties in getting certain kinds of books published; and about the risks to the future of scholarship presented by these trends. On the other hand, for the past thirty years and more there has also been much talk about the new possibilities opened up by digital technologies, and how they could transform both scholarship in the arts and humanities, and the ways in which it is communicated.

25. Despite the jeremiads, scholarly books continue to be produced in increasing numbers, and despite the panglossian prognoses of a fundamental and positive recasting of scholarly communications to be wrought by the digital revolution, the affordances of print seem to imply that physical books in traditional format will continue at the very least to co-exist with digital for the foreseeable future. In seeking to explore what the future might hold for academic books, this report examines whether such perceptions are accurate; and whether changes that are already evident in the research environment, in the nature of the research process, in how books are produced and consumed, and in the associated economics and business models, might imply for the future fundamental changes in the nature and formats of books and the roles that they play in the advancement of scholarship, knowledge and understanding in the arts and humanities.

1.1 Questions of definition: books

26. Any detailed consideration of academic books of the future inevitably raises questions of definition. The Oxford English Dictionary (OED) focuses in its primary definition of the noun 'book' on its nature as a physical object—"a portable volume consisting of a series of written, printed or illustrated pages bound together for ease of reading"—before providing thirteen additional definitions (with many sub-categories) and well over a hundred compounds, noun-phrases, and the like. Many of these further definitions emphasise the figurative or abstract characteristics of books as written compositions, and as repositories of texts, narratives, records, concepts, and sources of learning.

27. As we approach the third decade of the 21st century, these abstract qualities become more difficult to pin down in specific physical form, and the OED recognises that the term 'book' can now also extend to compositions in audio or electronic formats. For the past three decades, scholars in the digital humanities in particular have sought to free themselves from the restrictions of 'volumes of pages bound together' and to exploit the potential of digital formats to present and disseminate their work in new ways as 'digital objects': to include alongside their texts dynamic and interactive images, graphics and sounds; to provide links both within the text and to external sources; to allow readers to examine data and other evidence alongside core narratives and arguments; and to provide facilities for updating and annotation. There is undoubted excitement about opportunities of this kind, and the potential for new kinds of scholarship, as well as innovations in presentation. But there are practical as well as intellectual challenges too; and examples of books that fully exploit the potential of digital technologies and the web are as yet relatively few in number. The great majority of books are still written, produced, distributed and read in ways that would have been recognisable well over a hundred

years ago. Even when they are published as e-books, their format tends to derive from the physical printed book.

28. Academic books are of course a relatively small segment of the wide range of titles published each year, and again there are issues of definition. For the purposes of this study, we focus on scholarly works, usually but not always written by members of the academic staff of universities, which are written as contributions to knowledge and understanding of an issue or topic, and which are peer reviewed by other scholars before publication. Whether in physical print or digital formats, they can be categorised in a number of ways.

Monographs

29. Much of the focus in debates about academic books is on scholarly monographs: books typically of 80-100,000 words or more that provide a detailed examination of a specific topic, with a carefully-constructed presentation of evidence and contextual analysis, along with a scholarly apparatus of references and citations, bibliographies and so on. Often they focus on a closely-defined topic or field, though in some cases they seek to synthesise the results of scholarship over a wide range. Usually, they are written by a single author, though two or more authors may write a joint work.

Edited collections

30. A second category of academic books takes the form of collections of essays by different authors on specific aspects of a topic or issue, edited by one or more scholars who may also provide their own essay(s) in the collection. Edited collections of this kind had their origins in the papers from workshops and conferences, and reflect how published conference proceedings have not had the same significance in the arts and humanities as in the sciences. They remain more common in some disciplines than in others; and they have waxed and waned as a proportion of the total of academic titles

published each year. In some areas, they have been replaced by special issues of journals; but they remain a significant feature of the scholarly landscape.

Scholarly editions

31. A third important category of academic books consists of scholarly editions of the published works of an author or composer, or of the letters and other unpublished writings of a historical figure, or of the texts of important historical documents. Large-scale works of this kind often form a key part of the scholarly infrastructure of disciplines and subject areas, and are often the work of teams of scholars over several years. In physical printed form, they may consist of several volumes purchased in the main by libraries. Such editions often include a complex critical apparatus relating to different versions of manuscripts or published works, issues of interpretation or reading, linkages between different texts and so on. Scholarly editions in digital form have opened up new possibilities for the presentation of texts in parallel, with images and transcriptions, and different layers of complex interlinking.

32. Other forms closely related to scholarly editions are particularly important in specific areas of the arts and humanities, including *catalogues raisonnés* of a corpus of artworks, or scholarly catalogues of major exhibitions; and the edited musical scores of composers past and present. Again, when produced in digital form, the scholarly apparatus can be accompanied by dynamic interlinking, and with musical scores, for instance, accompanied by sound. There is obvious potential to extend such linking and the use of multimedia to all areas of scholarship and research in the creative and performing arts, including, for instance, theatre, dance, film and media.

Other kinds of academic book

33. Our focus in this report is on the three categories outlined above, though we are of course aware of other categories including textbooks (though definitions here are again far from clear-cut, especially in the arts and humanities), anthologies, creative writing, books published as part of artistic practice in its own right, performances and so on. Examples of all these featured in submissions in 2013 to the most recent Research Excellence Framework (REF) in the UK, as well as more widely in the published works of academics across the HE sector. We refer to them in passing, and we are clear that although academic books in traditional physical form have proved to be more sustainable and enduring in their value than some scholars and commentators had anticipated, and although the pace of change towards fully-digital books has been slower than many had hoped, the concept of an 'academic book' is becoming increasingly fluid.

1.2 Questions of definition: authors

34. We have noted above that while monographs tend to be the work of single authors (sometimes with significant input from editors and other pre-publication readers), edited collections and scholarly editions tend to be the work of teams of researchers. It is by no means clear, however, that there are common standards to ensure that the different members of research teams are credited as authors or in other ways where appropriate, and if so how. This is likely to become an increasingly important issue as team-based research in the arts and humanities expands, and as the roles of different specialists become more significant in the presentation of a wide range of scholarly material in a range of digital forms.

1.3 Questions of definition: publishing

35. The primary definition of the verb 'publish' in the OED is "to make public; to announce in a formal or official manner". In the world of the web and of social media, publishing in this sense—even of a lengthy scholarly work—is easily achieved by anyone with access to the internet. Publishers are thus uncomfortably aware that the distinction and the distance between the primary definition of publishing, and what they do to "prepare and issue copies of a [book] for distribution or sale to the public" and to "make generally accessible or available for acceptance or use" (OED definitions 3a and 3b) is not always as clear as they might hope.

36. When authors decide to publish an academic book with a specialist academic publisher, they typically assume—whether the assumption is spoken or not—that doing so will maximise the book's scholarly impact, and the credit and reputational rewards that they will receive as a result. Publishers on their part typically undertake—with varying degrees of commitment and resources—a series of activities designed to help achieve the desired impact and credit, as well as sustaining their own reputation and returns on the funds they invest in their publishing operations.

37. The activities range widely, including: finding, commissioning and selecting—through peer review and other means—authors and book proposals; building and sustaining lists of titles in selected areas; providing editorial support to authors to help them make their books as good as they can be; copy-editing and fact-checking; typesetting, and designing books to be produced in a variety of formats; producing physical print and digital copies, along with (for the larger publishers) platforms on which they can be read; marketing, enhancing visibility, distributing and selling copies through a range of channels in both domestic and export markets; and dealing with legal issues and rights management.

38. This range of services is typical for most academic publishers, though the resources devoted to each of them, and thus the costs which publishers must seek to recover, vary significantly according to individual circumstances. It remains unclear, however, whether in an online world the full package of 'publishing' services is required in all cases, or whether at least some of them might be undertaken by authors themselves, by their institutions or funders, or by third parties. The key point here is that publishing beyond the merely 'making public' is not a single event but a series of processes and services which could in principle be disaggregated and designed in bespoke fashion to fit particular needs, and subject to a test of the value added in each case.

1.4 Questions of definition: readers and users

39. Many, perhaps most, academic books of the kinds we focus on in this study are written and published for specialist audiences: students (particularly final-year undergraduates and postgraduates), academics and other researchers, and specialists in scholarly institutions such as museums, galleries and archives. And it is important to note that academics as readers may have different interests and perspectives from academics as authors.

40. A relatively small proportion of academic books are aimed in addition at a wider audience. By their nature, such titles attract the most attention via reviews and commentary in the non-academic press and related media. How academic books are read by different kinds of audience is likely to differ too, though we know relatively little about that. Nor do we know much about any differences between the behaviours of readers who have purchased a book for their own use, as distinct from using a library copy; or between reading a physical as distinct from a digital book (though the reading experience clearly differs, and the survey evidence shows (see Section 5) that as yet the majority of readers prefer physical print to

e-books). How behaviours might change as readers become more accustomed to the affordances of e-books, or as technologies develop further, is not clear.

41. What we do know is that many readings of academic books—monographs as well as edited collections and scholarly editions—take the form of consulting them, or reading sections or chapters, rather than reading them from cover to cover. This has implications for authors and publishers in how they construct texts and books to facilitate such reading, and in seeking to improve the discoverability of all elements of their contents.

1.5 Why write—or read—academic books?

42. Academic books play a key role in teaching and learning, scholarship and research in the arts and humanities; and more broadly in the creation and transmission of knowledge and understanding in those disciplines. As Crossick (2015) notes, monographs are often by far the most effective way of presenting and communicating research on a specific topic which may have been sustained over several years. Since the distinctions between data and interpretation are often more complex in the arts and humanities than in the sciences, there is often a need to present dense and lengthy descriptions of evidence, and to build an extended narrative or exposition of theoretical approaches, much longer than could be handled within the constraints of a journal article, or even a series of articles. The very act of writing in this way is formative in identifying relationships between different pieces of evidence, shaping ideas, and constructing arguments—what Crossick calls 'thinking through the book'.

43. Readers with a specialist interest will often wish to read a specific book as a whole, precisely so that they can develop their knowledge and understanding in their area of interest; but also so that they can interrogate the evidence, arguments, and ideas in the round and in detail, and seek to identify connections and relationships between

what they find in the book and in other primary and secondary sources in their field. Other readers, however, may read only those sections of particular interest to them, or dip in to find specific pieces of information; which is why for print books in particular the apparatus of tables of contents and indexes are of particular importance.

44. But as Crossick also notes, drawing on evidence from the OAPEN-UK project and other sources, the publishing of monographs is also bound up with the building up of a scholarly reputation, and thus with career progression. There are variations between disciplines and sub-disciplines, and also between departments and institutions; but the sustained work involved in writing a high-quality monograph is widely seen as providing an important indication of an individual scholar's qualities. In the UK, there may in some instances be countervailing pressures favouring the publication of articles rather than books, arising from perceptions (or misperceptions) as to the requirements of the REF. Nonetheless, in disciplines such as literature and history, publication of one or more monographs, especially with a well-regarded press, is frequently seen as an important criterion—even if not formally stated—in judging between candidates for academic appointments and promotions; and it may play a part too in judgements as to the quality of an academic department as a whole.

1.6 Communities of the book

45. Academic books function in a complex ecology which involves an array of organisations and individuals in universities and other research institutions, funders and policy-makers, publishers, libraries, and other intermediaries; changing practices and expectations from all those players; changing technologies and the development of new services from a wide range of information and service providers, including some whose interest in academic books

is marginal at best. Change in any part of that ecology may have profound implications elsewhere. Hence the importance of seeking to develop a clearer understanding of the relationships between the interests and behaviours of the different parties, and the interactions between them.

46. Even when we focus on the journey of a text from author to reader—however those terms are defined—we find that it involves a complex array of players. Most of them are only dimly aware of the roles the others play and how; and of the interconnections between them. In addition to publishers and the freelance copyeditors, typesetters, designers and indexers they employ, the supply chain for academic books involves sales agents, distributors, wholesalers, libraries and library suppliers, booksellers (online as well as on high streets and campuses), e-book aggregators and platform providers, bibliographic data suppliers, and many others. Again, lack of understanding of the activities and roles of the different players seems both undesirable in itself, and an impediment to progress in making the journey from author to reader more effective. There are good reasons why that journey is currently as complex as it is; but it is not clear that all the current layers of complexity need to be preserved for the future. Better communication between all the communities involved in the writing, publishing and reading of academic books is one of the essential steps if we are to sustain a vibrant future for them.

47. For all these reasons, one of the key aims of this project has been to identify and examine the perceptions of the many different players, and the relationships between them; and to encourage dialogue both now and for the future. If we succeed in that, even to a limited extent and for the most part in the UK, the project will have been worthwhile.

1.7 Forecasting the future

48. The two singular nouns in the title given to our project—"the academic book of the future"—are unfortunate and misleading. Academic books already come in many different forms, and the diversity is increasing rather than diminishing. Nor is there likely to be a singular future for academic books; rather, they will continue to evolve along many different paths, some more firmly rooted in the past than others. Moreover, the academic books of the past are at least as important for the continuing health of most—if not all—disciplines as the books yet to be produced.

49. Many commentators see the future as largely if not wholly digital. As Frances Pinter has put it (2016), we "must first rip off the physical covers of the 'book' and move swiftly to the digital realm". It seems unlikely, however, that transformation to a wholly digital environment will occur any time soon. The transition to e-books—and more especially the development of 'enhanced' digital books with new kinds of multimedia content, linkages to many different kinds of related material, and interactive functionality—have already taken much longer than technological optimists had anticipated; and there are signs that sales of e-books are slowing (Milliot, 2016). The evidence suggests (Wolff et al, 2016) that academics' preference for physical print books is if anything increasing. Physical printed books seem likely to be a key part of the landscape, alongside new kinds of digital 'books', for some years to come.

50. But a mix of current developments seems likely to increase both the pace of evolutionary change, and the number of pathways along which it progresses. The developments include, in no particular order, the growth of digital provision for teaching and learning; advances in digital scholarship and research; increased interest in research that crosses traditional disciplinary boundaries, and in research relating to 'grand challenges'; changes in research policies

and priorities from funders and policy-makers; constraints on library budgets and space, alongside the development of new library services; open access policies and initiatives; consolidation in the publishing industry and in the supply chain, alongside the growth of new start-ups; the continuing development of new technologies and digital workflows; and the development of new business models and processes for both digital and print books.

51. It is impossible to predict precisely how these different factors will influence change for academic books, and what form it will take. But it seems clear that scholars will continue to engage in long-form writing, creating narratives and complex arguments, and presenting and interpreting evidence in the light of theory; and that other scholars—alongside yet others who have a less specialist interest in the topic—will continue to read them. Scholarly editions of significant publications, manuscripts, pictures and scores will also continue to be produced and published in a variety of forms as a key part of the intellectual infrastructure for key subjects and disciplines.

52. Much is likely to remain the same. But the abstract as distinct from the physical characteristics of books—as repositories of texts, narratives, records, concepts, and sources of learning—are likely to become more prominent. For some kinds of books, the act of writing may become more collaborative, and much more influenced by embedding or linking to a wide variety multimedia and other content, and the use of interactive features in the presentation of the book. In other cases, there may be greater emphasis on presenting complex arguments, evidence and findings in ways designed to render them digestible to a variety of non-specialist as well as specialist audiences, within academia and beyond.

53. But whatever form books take, physical and digital, there is likely to be increasing diversity in how they are published, with scope for increasing differentiation between the services that publishers

provide in different circumstances and for different kinds of books. The full range of selection and quality assurance, editorial support, production, sales, marketing, and other services may not be required in all cases; while in specific circumstances there may be an enhanced requirement for services in the form of editorial support, design or production. Similarly, discovery services and delivery systems are not currently well-attuned to the needs of readers, or to new kinds of digital 'books'. And the supply chain services needed for some kinds of books may not be needed for others, but in other cases they may need to be enhanced or fundamentally re-thought. Achieving these kinds of changes will not be straightforward, and will require detailed discussion between the different groups of players.

54. The emergence of new university presses and library publishing initiatives in the UK, US and elsewhere is driven in large part by a desire increasingly evident in the HE community to exert greater influence over the packaging and dissemination of the scholarly knowledge that they both create and consume. But the practicalities of publishing and transmitting high-quality scholarly content effectively and at scale across the world are daunting. A variety of futures for the many different kinds of academic 'books' is most likely to derive from dialogue between the aspirations of the scholarly community and its funders on the one hand, and the wide range of publishers, libraries and intermediaries with expertise in the transmission of knowledge, and meeting those aspirations, on the other. We seek in this report to examine both the aspirations and the complexities involved in successful transmission of the knowledge embedded in books, in order to identify ways in which the business of creating, publishing, discovering, and gaining access to books might be made more effective.

2. Publisher Perspectives

2.1 Introduction

55. Publishers of academic books sit on the interface between authors in the arts and humanities and their readers; and thus more broadly between scholarship in the arts and humanities and its value to the public. But the political, economic, social, cultural, and physical geography of the interfaces is complex. Publishers operate at a global level, depending for their success on attracting authors and readers not only in the UK but the rest of the world. Authors work in institutions with their own cultures and policies, funded by governments and other organisations with *their* own policies (which differ even within the UK). But authors are also strongly attached to disciplines each with an international reach and with their own distinctive cultures. And some authors, of course, operate as independent scholars outside any institutional context.

56. In operating on the interface between authors and readers, publishers provide many different kinds of services (to which authors and readers may attach different levels of value). Publishers vary in how they provide those services, and the weight and resources they devote to them. Indeed, academic 'publishing' involves a series of processes—attracting and selecting authors and their proposals; peer review; building lists; working with authors to develop and improve their texts; help with sourcing of illustrations and other material; copy-editing and type-setting; design and production for both print and digital books; marketing, distribution and sales; and protection of copyright—which have traditionally been encompassed within the operations of organisations termed publishers. But the development of the internet and, more particularly, the world-wide-web, may call increasingly into question whether 'publishing' services need inevitably and invariably to be provided and packaged together in this way for the future.

57. Despite recent mergers, the academic book publishing landscape on which UK authors depend has changed significantly less over the past few decades than that for scholarly journals. In the UK, it remains dominated by a relatively stable and small number of UK-based university and commercial presses, alongside the larger American university presses. But it is also characterised by a long tail of well-established as well as newer and smaller presses—based overseas as well as in the UK—which have a loyal following among both authors and readers, and which play important roles in some disciplines and sub-disciplines. Thus Laurence King, alongside larger independent publishers such as Phaidon, is an important presence in the visual and creative arts; Darton, Longman and Todd in religious studies; and Berghahn in film and media studies, along with areas of history such as colonialism. Many more could be added to this list. Some of the more successful smaller presses have been acquired by larger commercial publishers, but they have been replaced by new entrants with specialist niches in specific disciplines or subject areas.

58. The relative stability in the landscape reflects the absence in monograph publishing of the kind of sea change seen in journal publishing over the past two decades, driven by technology, changes to research processes, and new entrants to the market. Some university presses and other publishers started experimenting with the possibilities of the digital publishing and the web in the 1990s (see the literature review and Watkinson, A, 2016 for a summary of some of the experiments); but twenty years later, monographs are still for the most part conceived of and written as physical objects, and the shift to digital formats has not taken place nearly as fast—or with the transformative effect on form, presentation, and distribution—as has been evident in scholarly journals.

59. From a publisher perspective, this is partly because of fundamental differences between marketing, sales, and distribution for journals on the one hand and monographs on the other. Journal publishers

now market, distribute, and sell repeat online subscriptions to a defined package of titles each year, using a small number of intermediaries, if any. By contrast, monograph publishers sell mainly physical printed copies of newly-minted titles, along with backlist titles new to the customer, using a wide range of supply mechanisms.

60. Nevertheless, there have been changes of profound importance, some of which are relatively hidden from view, and which have in some senses underpinned the appearance of stability. Thus developments in digital printing, along with e-commerce systems and new services to deliver books to consumers, have had fundamental and beneficial effects on the processes and the economics of producing and distributing books with the limited sales potential typical of monographs. The retail market for monographs in traditional format has been transformed by Amazon in particular (Fisher et al, 2016). More recently, however, the critically-important library market for monographs—which the evidence suggests may account for up to half of the sales for monographs (Anderson, 2014)—is being changed by the adoption of new acquisition models, particularly but not only for e-books, and what is often characterised as a shift in libraries from just-in-case to just-in-time collection building. Many of the publishers we have spoken to have strong concerns about the viability and sustainability of such models in the long term, and the risks that they pose to the whole ecology of publishing monographs.

2.2 Publishers and the academic environment

61. Publishers are very conscious of changes in the environments in which most of their authors—and readers—work. They are thus very much aware of the pressures on academics to publish, driven by the demands of increasing trends towards performance management and assessment, by the perceived (correctly or not) requirements of the REF in the UK, and by perceptions of what is needed to secure

appointments and tenure in many other countries. Such pressures have a direct effect on publishers in terms of the volume of proposals submitted to them and, in the UK, the timing of the submission of both proposals and completed manuscripts in relation to the REF cycle. Publishers are also conscious of the growing importance of the 'impact agenda' which requires academics to demonstrate the effects and influence that their work is having not only among the research community, but more widely. Some trade publishers in particular suggest that they are in a strong position to help authors demonstrate impact of this kind, although they are also aware that it depends not only on the nature of the book and the sales it can achieve (only a minority of scholarly monographs can possibly aim to have a large-scale impact beyond the realms of specialist scholarly readers), but on developing a wide range of activities post publication. Nevertheless, the evidence shown in impact case studies presented to the Research Excellence Framework (REF) 2014 pointed to a strong role played by both commercial publishers and university presses in providing ways to enhance the impact of scholarly work.

62. Several publishers spoke to us also of their awareness of other pressures that are 'stretching' academics—perhaps especially in the arts and humanities—even further: that the number of academic posts has not increased as fast as the number of students; that funding for the support of research is much more constrained than in science, technology, and medical (STM) disciplines; and that nevertheless humanities scholars are subject to assessment procedures that may be appropriate for STM researchers, but less so in the arts and humanities. Evidence from our interviews shows that some publishers fear that the time pressures on academics mean that editors have to devote more attention to helping authors to ensure that their manuscripts are in the best possible shape before they are finalised for publication.

63. Publishers in both the US and the UK have also expressed concerns that the expansion of higher education is now being accompanied by an instrumentalist agenda which means that the humanities are losing further ground to STM (including social science) disciplines both in research funding and in student numbers, and that in the medium to long term this will have an impact both on supply and demand for academic books. They suggest, for example, that changes—in the UK in particular—in student finance systems, combined with an assumption that academic content should be available freely online, mean that both undergraduate and postgraduate students show less propensity than in the past to buy specialist books.

64. All these concerns are accompanied by awareness of changes in the nature of research, even though those changes have tended to be slower to emerge in the humanities than in other subject areas. Digital scholarship has as yet had a limited impact on publishing in the arts and humanities beyond the digital humanities community. Nevertheless, publishers are aware of a shift towards larger-scale research projects, with some signs of an increase in the numbers of collaboratively-authored books, and also of some erosion of traditional disciplinary boundaries. This can bring new opportunities but also challenges for publishers in commissioning and editorial processes, and also in marketing and sales, which have all traditionally been structured around the major disciplines.

65. More generally, despite the persistence of monographs in formats little changed over the past two hundred years, and the continuing evidence of a preference for print, publishers are aware of the proliferation in the ways in which—when, where and how—scholarly works are created and consumed, and of the potential for exploiting the affordances of the web in new ways. But while they are aware that at least some scholars are beginning to ask fundamental questions about how scholarship is undertaken, and new knowledge

created and disseminated in a digital environment, publishers are understandably wary of moving too far ahead of the research communities they serve in seeking to promote new forms of publication.

66. Nonetheless, publishers we spoke to are mindful of the democratising power of the internet and the world-wide-web, and of the challenging implications for their roles as gatekeepers to high-quality content, and for the kinds of services they provide. Initiatives and policies to promote OA are but one element in the broader challenge they see of making books more widely accessible and relevant to a wider set of audiences, many of whom are becoming increasingly accustomed to—and satisfied with—'good enough' and thus less likely to be convinced of the importance of authoritative, quality-assured content. Reaching such audiences—and moving where possible beyond the model of publishing books written by specialists and aimed at readers in the same specialism—is the more important as library budgets for books continue in their tendency to fall, and as libraries and their suppliers respond by making greater use of e-books and seek to match their purchasing decisions more directly to user needs through new acquisition models (see Sections 3.2 and 9.3).

67. Most publishers believe that the market for academic books is unlikely to grow very much (if at all) for the foreseeable future, though some see growth opportunities in emerging markets overseas. A recent report (Simba Information, 2014) suggests that China, India, and Brazil are becoming significant players in social science and humanities research, and that in some (but not all) emerging markets and in some disciplines, English is increasingly used as the language of communication for scholarly work, thus opening up new opportunities for English-language publishers. Nevertheless, most of the publishers we spoke to see stability (at best) rather than growth in the market for monographs; and many of

them fear that ensuring the sustainability of their revenues in such circumstances—from sales or from other sources—is likely to be an increasingly difficult challenge.

68. In this kind of context, some publishers are concerned about the risks of an increasing disconnect between academics and publishers. Authors want to publish with prestigious publishers in order to gain the reputational and career rewards that flow from doing so. But authors' expectations may sometimes run ahead of what publishers think they can reasonably deliver, and there is a widespread feeling that publishers in general and academic publishers in particular have been poor in explaining what they do, why and how, and the value they add in the publication process. Some of the tensions surround legal and contractual issues which we discuss in Section 7. But more generally, publishers are aware that as researchers become more used to operating in the digital world, and as more content is available on the web, some of their authors and readers are beginning to ask why publishers are needed at all, and what place academic books, as currently conceived, play in a world of information superabundance.

69. Many of our publishing interviewees thus spoke of the need not only to articulate and promote their value proposition more effectively, but to address inefficiencies and dysfunctional aspects of the publishing business: to reduce the time taken to publish a book, to enhance discoverability, to improve cost-effectiveness in the supply chain, and so on. For there is a common feeling among many academic publishers that their precise roles in nurturing and disseminating academic work, and the subtleties of an editor's involvement with authors and manuscripts, are widely misunderstood. Such concerns also raise more fundamental issues—in an environment when authors can readily 'publish' their work on a website, or self-publish via services such as CreateSpace or Lulu—about the costs incurred and the value added by publishers at each

stage of the 'publishing' process; and thus about the economics and the business models associated with publishing.

2.3 Publishers and their roles

70. The changes in the academic environment, and challenges of the kind outlined above, affect different publishers in different ways. Books from more than three hundred different publishers were submitted to the art and design panel during the last REF exercise, and from 272 to the history panel (Tanner, 2016). And it is a strength of the academic publishing ecology that there is such diversity among publishers: no two presses are alike.

71. But it is not surprising that university presses in particular have begun to ask questions about their purposes and role. For university presses occupy a distinctive position in both the publishing and academic landscapes. Organisationally they are part of their host universities, with a variety of arrangements for oversight and reporting to senior management; and academics are usually closely involved both as members of editorial boards and the like, and as authors and reviewers. But while both the press and the university may benefit from the exchange of ideas, and from the reputational rewards that may come from publishing, presses have tended to be seen as adjuncts to rather than integral parts of universities. Nevertheless, they can often act—in ways that commercial presses cannot—as a focus for dialogue between academics and publishers about the realities as well as possible futures for the scholarly communication system; and many academics come to university presses with a different set of expectations about the values and services that should be on offer, as compared to commercial presses (Cond 2016).

72. University presses were originally founded to publish the work carried out by scholars in their own institution, but few now restrict themselves in that way. It is notable, for example, that recent

research reveals that only a small proportion of monographs produced by academics of two major US universities were published by the local university press (Kahn et al, 2015; Cope et al, 2015). Nevertheless, in the context of the changes in the academic environment outlined earlier, press missions are increasingly seen as closely linked to those of their host universities, as universities themselves place greater emphasis on the wider dissemination and impact of their work. Hence many university presses are seeking new ways to demonstrate their value to their host institutions, and some are taking steps to build closer relationships with other departments of the university, particularly libraries.

73. The larger established university presses in the UK—particularly Oxford (OUP) and Cambridge (CUP)—have many strengths, arising from the variety and volume of the content they publish, both currently and in the past; from their wide range of expertise in handling and disseminating that content in both print and digital form; and from their worldwide profiles and reputations, which enhance those of their host universities. And they are seeking to exploit those strengths in pursuit of their missions to promote and disseminate research and scholarship of the highest quality through the development of new digital services such as Cambridge Core and Oxford Scholarship Online.

74. But a striking development of the past two-three years in the UK has been the creation of new university presses at institutions as varying as Cardiff; Goldsmiths, University of London; Huddersfield; the White Rose Group of universities (Leeds, Sheffield and York); and Westminster. Some derive from top-down senior management initiatives, while others have been generated by bottom-up initiatives from committed academics and others (particularly librarians). The motivations have been various, including a desire to promote and enhance the global impact of the university, its academic staff and its research; to ensure that universities provide

effective support for research from inception to publication; to provide a means to disseminate work—especially in new formats—that might otherwise struggle to find an outlet; to support early-career researchers and those working in highly-specialist areas; to facilitate the publication and dissemination of work specific to the university, including its collections and its history; and to foster innovation and promote new models of scholarly communication. Some of them (following the example of the Australian National University (ANU) Press established in 2003) are closely linked to their university libraries, and they are almost invariably committed explicitly to OA publishing (Lockett et al, 2016).

75. These new university presses are as yet small start-ups, with very few staff (sometimes less than one FTE), and small numbers of publications, some but not all of which seek to exploit the potential of new digital technologies. Most of them depend on significant unpaid input from colleagues, and/or on shared platforms; and one of them has suggested that at present they have more in common with the world of self-publishing than with the more established presses. At this stage in their development we may distinguish between these new university presses and the related development of publishing initiatives located firmly within university libraries themselves (discussed further in Section 3.7). Whether the distinction will remain, or the two kinds of initiatives will eventually meld, is not yet clear.

76. But if, as they well might, the new university presses are to grow into sustainable and significant players in the business of publishing academic books, they will have to focus hard on developing and implementing their strategies in key areas including governance structures and the relationship(s) between the university and the press; branding, and the nature of the lists they seek to develop; their target groups of authors, the services they provide to them, and how; their staffing and skills, workflows and costs; and their revenue and

pricing models. These issues are of course closely linked, and will determine the attractiveness of these new ventures to both authors and readers. But they will also need to guard against the risks of becoming the default publishers of books that have been rejected by other presses; ensuring the high quality of the books they publish will thus be a key imperative. Some relatively new university presses, such as Bristol University Press (recently established on the foundations of Policy Press, based at the University, which specialises in policy-related social science and now publishes some 120 books a year) have managed by careful attention to such issues to develop a significant profile in their specialist areas (Shaw, 2016).

77. At present, the presses established in the past two-three years are exploiting the enthusiasms within their host institutions, the potential of new technologies, the benefits of operating at modest scale, and the ability to move swiftly, to create new opportunities for innovation. Along with a number of important independent OA book publishers, such as Open Book Publishers and Open Humanities Press (which have both been established for rather longer), they provide a potentially-valuable increase in diversity and choice within the publishing environment.

78. It is important to note the differences as well as the similarities here between the position of university presses in the UK and the US. The dominant position of OUP and CUP has no equivalent in the US, where the Association of American University Presses (AAUP) has over 100 members based in North America, organised in four groups by size, ranging from those such as Chicago and Yale which publish hundreds of books a year (as well as several journals), through to those that publish only a dozen or so books a year. Their sales and revenues vary accordingly, as does their publishing mix (the smaller presses tend to focus their outputs on monographs); half the members have revenues of less than $1.5m a year. They tend to focus on the humanities and social sciences, and like the smaller

established university presses in the UK (Edinburgh, Liverpool, Manchester and Wales) to develop lists focusing on specific disciplines, with a strong emphasis on rigorous peer review and editorial support. Collectively, they publish each year fewer titles than the UK-based university presses; but significant numbers of UK authors publish with US university presses. On the other hand, since the US market is much bigger than the UK's, US university presses are much less dependent than their UK counterparts on export sales, which represent less than a sixth of total sales (AAUP, 2017b).

79. As we noted in our initial literature review, the extensive commentary on 'the crisis of the monograph' is longstanding and continues to expand; and it tends increasingly to be dominated by concerns from the US about the future of university presses, their roles and business models. The missions of US university presses, like their UK counterparts, are linked closely to those of their host universities, and stress the importance of disseminating knowledge. But there have been concerns that at least some presses were being perceived as disconnected from their host university's strategies and priorities, or as essentially invisible and/or irrelevant. Such concerns have in many cases been exacerbated—in a context where many US university presses are operating at a loss, and depend in significant part on subsidies from their universities rather than contributing revenues to them[1]—by sharp falls in revenues from sales; by shifts in technologies; by the development and take-up of new forms of scholarly communication and of quality assurance; and by lack of resources to invest in those new opportunities. Indeed, some reports (Withey, 2011) suggest that business models based on sales of books are 'clearly inappropriate for the twenty-first-century scholarly ecosystem'. There is thus a widespread assumption that support

[1] Support from their parent universities amounted to 11.2% of net sales in 2016, though with wide variations between presses (AAUP, 2017b)

from foundations as well as host universities will remain essential as presses seek to move towards a digital future.

80. As in the UK, presses vary in the precise nature of their place within their host university, but a common move in response to such concerns has focused around building closer relationships with the university library, and in some cases seeking to secure financial, socio-political and technological benefits by becoming organisationally part of it. Hence some commentators (Staumsheim, 2016) talk of a blurring of the lines between presses and libraries, as libraries themselves take a lead in exploiting new technologies and developing new services for researchers, including new library-run publishing programmes (see Section 3.7). The vast majority of publishers, however, insist that the success of such programmes depends on libraries acquiring specialist publishing expertise; librarians cannot undertake the many different roles of publishers on their own. And there are sharply differing views on the nature, appropriateness, and effectiveness of links between university presses and libraries (Watkinson, C, 2016; Esposito, 2013)

81. One response from US university presses to the kinds of issues and concerns outlined above has been to accept a role that focuses on the declining market for print monographs. But there is a growing perception that print monographs cannot be sustained in their current form, and hence an increasing focus on the potential of OA models for monographs (see Section 10), or on new kinds of products and services, or on developing new partnerships and consortia to enhance both their cost-effectiveness and their reach. For the most part, however, in relation to monographs, attention remains focused on the provision of a service to authors—particularly early-career authors—in enabling them to publish highly-specialist work in long form; and the challenges of finding business models that enable presses to continue to perform this service when sales are low and declining (Straumsheim, 2016; Hilton

et al, 2015). Major support has been provided by the Mellon Foundation for a range of projects seeking to help develop new capacity; to identify and promote opportunities for innovation in publishing systems; to develop platforms and infrastructure to underpin scholarly publishing; and to advance new business and operational models and systems, and the search for greater efficiencies in the scholarly communications ecosystem. One of the key proposals emerging from these and other studies (Crow, 2014; Elliott, 2016; Walters et al, 2015), is that universities and others should seek to sustain their services to authors by providing subventions to support the publishing of their books on OA terms. Subventions to publishers are already common in the US (AAUP, 2017; Esposito et al, 2017); but concerns have been raised about quality control, the relationships between presses and their host universities, and indeed which presses would be eligible to receive subventions to support OA (commercial presses, non-US university presses?). It remains to be seen whether such models will be adopted on a wide scale. But at least some of the various initiatives funded by Mellon and based at individual presses or groups of presses may well thrive and yield fruit, with further potential for collaborative developments; others will no doubt fade away. Whether any of the developments outlined above will create a sea change in the ecology of scholarly publishing is not yet clear.

82. Moreover, it is important to stress that university presses, both in the UK and the US (and indeed in Europe and more widely) are but part of the scholarly publishing landscape, alongside commercial presses and other not-for-profit publishers such as learned societies and publicly-funded institutions such as museums and galleries. Smaller publishers can flourish by focusing on developing and sustaining their reputations in specialist areas, though they must guard against the risk of focusing too heavily on editorial functions, or on seeking simply to publish the best books they can, while

ignoring crucial areas of change in business and service models, in production, and in engagement with authors and readers. Larger publishers, in both the commercial and not-for-profit sectors, also seek to develop specialist niches; they just have more of them. They also have more resources to invest in new technologies to develop efficient infrastructures to help drive down costs. But they are also examining ways to shift their position in the value chain, exploiting new technologies to find new ways to focus on the needs of different kinds of readers, by analysing user data and behaviour (though this is as yet in its early stages), by developing new information and metadata services, and by defining more closely how they deliver different kinds of content to different groups of users for different purposes (Goldsworthy, 2015). And many publishers both large and small are working increasingly in partnership with other organisations such as learned societies and with specialists with new tools and services to help enhance their engagement with both authors and readers, whether by providing collaborative author tools, seeking to drive visibility and impact, building networked communities, or a host of other ways. For university presses in particular, the exploration of new platforms and processes for opening up scholarly communication in the digital realm is of critical importance in pursuit of their goal of advancing knowledge and diffusing it far and wide.

83. But such partnerships, and seeking to exploit new opportunities in the value chain, should not be seen as implying, for the great majority of publishers, a shift of focus away from high-quality content. The publishers we spoke to thus insist that content—not technology—is the main driver of their business, along with the search for opportunities to derive incremental value from that content. And the consolidation of businesses seen in the commercial sector in recent years has taken the form in the main of larger publishers acquiring smaller ones with strong lists and reputations,

enabling them to aggregate content, and to achieve the scale that facilitates the development of services to support the creation and effective dissemination of that content.

84. For all scholarly publishers, however, both large and small, commercial and not-for profit, the drive is to commission and publish high-quality titles, to take that content to the widest possible audience, and to engage with authors and readers in new ways. In so doing, they see themselves facing four key challenges:

- to sustain and if possible to enhance their reputation both for the scholarly quality of the titles and the content they publish, and for the standards to which they are produced and presented;
- to respond to changes in technologies and in the academic environment by renewing their strategies, and developing new tools, service offers, and models;
- to ensure that their titles are effectively marketed and efficiently distributed, so that they reach their desired audiences; and
- to ensure that they generate the revenues to invest in, develop, and sustain their operations and services for the future.

85. Whether they can meet all these challenges—and sustain their current levels of services to authors and readers—in an environment where the potential supply of new titles appears greater than the effective demand for them is uncertain.

2.4 Supply and demand

86. It is a commonplace in the literature on the 'monograph crisis' that monographs play a role of fundamental importance to the advancement of scholarship in the humanities. We shall not repeat here the points made in the literature review and the Crossick report (2015) about the importance of monographs in communicating scholarly findings to peers and to wider audiences, and in building

scholarly reputations and the career rewards that flow from them; or about how humanities scholars seek to develop ideas and narratives at length, where the processes of research, writing, and the construction of arguments are intertwined.

87. Publishers are highly conscious of the roles that they play in this ecology, in responding to the pressures on academics to publish at book length, and thus in providing the means to enable scholars to achieve their goals and the benefits that accrue from creating and publishing a monograph. Most publishers build their lists in their specialist areas through a mix of direct and indirect commissioning on the one hand, and consideration of unsolicited proposals on the other. Editors build up contacts with academics through attendance at conferences and the like; and many book projects arise from informal conversations at such events. Only a proportion of proposals (commissioned or not) result in a publishing contract, of course, with the proportion varying by publisher and subject/disciplinary area and in accordance with their peer review and quality assurance criteria and processes. But we must stress the key role—much more critical than in the journals world—that commissioning editors play in the process of building lists in their specialist subject areas, based on wide-ranging subject knowledge, developing and sustaining strong relationships with authors (potential as well as actual), generating ideas, and seeing them through to the delivery of a high-quality text (see Section 6).

88. The publishers we spoke to all reported that the number of book proposals they are receiving is tending to rise, or at worst to remain static. This is in part, no doubt, because with the continuing growth in the HE sector, the numbers of potential academic authors continues to expand, though it is not clear that this will continue indefinitely, in the humanities in particular. Some commercial publishers seek actively to stimulate supply by setting targets for new titles for each of their editorial teams, or seek actively to build

lists in new areas they see as having high potential for sales. Indeed, strong lists in specific areas of study are seen as particularly important in stimulating and sustaining sales to libraries. Many publishers concede that they find difficulty in handling proposals in new areas, or which cut across the disciplinary and subject boundaries around which publishers, mirroring the structures of most universities and their libraries, have traditionally built their editorial functions. But we have detected no evidence of a fall in the submission of book proposals, or in the ability of publishers to handle and make decisions about those proposals.

89. Nor do we detect any change in the evidence presented in the Crossick Report that the major publishers of scholarly works in the UK—whether the established university presses or the bigger commercial presses specialising in scholarly works, such as Taylor & Francis or Palgrave Macmillan—are increasing rather than reducing the numbers of titles they publish. It is not clear in all cases whether this is an entirely rational response to reductions in sales per title by seeking to spread their infrastructure costs, and their revenue risks, across more titles, or more simply a response to the numbers of submissions made to them. But Taylor & Francis, for example, published more than five thousand titles across all its imprints for the first time in 2014, and Bloomsbury published its largest ever number of monographs in 2015. The various data sources from the US are not entirely clear on this point (Greco et al, 2007), not least because of the difficulties in defining the various categories of academic books. But data from AAUP suggests that the overall production of monograph titles by American university presses is running at between 5,000 and 7,000; and that it fell between 2000 and 2005, but then recovered by 2010, before falling marginally again by 2015. More recently, a report for the Andrew W. Mellon Foundation (Esposito et al, 2017) suggests that between 2009 and 2013, AAUP members published an average of c. 3,000 monographs

in the humanities each year, but that the yearly average was falling during that period. The report also pointed to the strikingly low proportion of the total of AAUP members' titles that could be categorised as humanities monographs.

90. Falling trends in sales and revenues are a major concern on both sides of the Atlantic. They are bringing new pressures and changes in the economics surrounding the publishing of scholarly monographs, as print runs for individual titles are falling to as low as 200 or even fewer. Evidence from both the UK and the US shows that demand has not kept pace with increases in supply. In the retail market, where there is a strong preference for print, sales per title have tended to fall (Section 8). And in the core library market, acquisition budgets have not risen in line with overall university expenditure, either in the US or the UK, and they have been increasingly taken up with journal subscriptions, with a resultant heavy constraint on the funds available for book purchase (Section 3).

91. Print sales still predominate, but libraries in both the US and the UK have responded positively to the availability of packages of e-books created both by the larger publishers and by aggregators, and to new acquisition models. Across the sector, libraries are showing an increasing preference for e-books. The key problem for publishers at present is that sales of e-books tend to supplant print sales; and they have not found ways to ensure that the revenues they derive from e-books—especially those they receive from aggregators who buy and sell at a discount—come near to compensating for the print revenues they have lost. Overall university press revenues from print fell by 25% between 2008 and 2015, and while digital revenues rose nine-fold, they did not compensate for the loss of print revenues (Greco 2015). Moreover, while the increasing availability of e-books opens up the possibility for publishers as well as librarians to gain insights into how books are used, and by whom—and also to enhance their post-publication engagement with authors by sharing that

information with them—they have not yet developed any sophisticated understanding of usage metrics, or of the potential impact of such metrics on their sales models.

92. These problems are common to publishers both in the UK and the US, many of whom speak of e-books contributing typically 15-30% of sales revenues, and tending to be lower in the US (AAUP, 2017). Some publishers see low print runs as the development of a welcome realism about the size of the market, and about the cost and pricing implications that flow from that.

93. The economics of small print runs have been changed fundamentally by developments in digital, as distinct from offset printing. But as we shall see (Section 6), the major costs in publishing and selling books related to editorial, distribution, and marketing functions rather than production. As we discuss in Sections 4, intermediaries play a crucial role in the supply chain, with major implications for costs and revenues. Larger publishers with the resources to develop and sustain their own e-commerce platforms for retail sales, and digital platforms for e-book sales to libraries, have a preference for direct sales via those platforms. Nevertheless, both they and perforce the smaller presses depend on a wide range of intermediaries for a high proportion—the smaller presses for all—of their sales. In some cases, the key services are provided by other publishers, with OUP for example, providing sales representation in the US for a number of UK publishers. Larger presses may deal with thirty or more agents, wholesalers, distributors, booksellers, aggregators, and library suppliers; and it is important for them—but difficult for the smaller ones—to build good relationships with the most significant ones in their key domestic and overseas markets, and to monitor sales performance via the different intermediary routes. A key challenge for publishers, however, is that these intermediaries now play a much less significant role in marketing than they did two decades ago. We discuss these issues further in Sections 4 and 9.

2.5 Quality and types of books

94. Academic publishers all depend on a reputation for quality, and they all compete for authors as well as retail and library sales. So publishers depend critically in the current ecology on the expertise and skills of their editorial staff in building relationships with scholars, in commissioning and overseeing the work of their authors, and in developing their lists of publications; of their production staff in ensuring that books are produced to high standards; and of their marketing and sales staff in seeking to ensure that their titles achieve the highest possible sales and readership. But innovation in processes and in managing workflows in all these areas, as well as in developing and exploiting new digital technologies and services are also essential to sustaining the reputation of the press; and hence the skills publishers need are changing too (see Section 6).

95. Sustaining and enhancing the quality of their brands is of critical importance both to commercial publishers and to university presses. Indeed, in the best case there is a reciprocal relationship between authors and publishers in terms of reputation and prestige: high-quality authors and books confer prestige on publishers, stimulating not only sales but a flow of more submissions from high-quality authors; and publishers with a high reputation confer prestige, and the career rewards that flow from it, on authors and their books.

96. Selectivity is thus at the heart of what publishers do. The processes they use to ensure that the books they publish meet their quality criteria vary in detail; but all the publishers we spoke to stressed the critical roles of editors and their engagement with academics both before and during the publishing process.

97. Close engagement of this kind brings with it costs, of course; and despite the moves to make workflows more efficient, publishing academic books remains a labour-intensive business. A recent report (Maron et al, 2016) estimated the full costs for a sample of American

university presses of producing a high-quality digital monograph at an average of between $30,000 and $49,000, with outliers between $16,000 and $130,000. Staff costs associated with commissioning and editorial processes were by far the most significant element in those costs. Some questions have been raised about the methodology, and the evidence suggests that costs can be higher for smaller presses that cannot benefit from economies of scale (AAUP, 2017b); and no similar studies have been undertaken in the UK, or for commercial presses. But costs at these kinds of levels must give rise to questions as to the balance between expenditure and the value achieved for each monograph; and sales and pricing data for AAUP presses (Esposito et al, 2017) suggests that many humanities monographs cannot be covering their costs.

98. In such a context, publishers are very much aware of the concerns that only those books with profit-making potential will be published, that commercial considerations may thus trump scholarly quality in decisions on whether or not to accept a book proposal, and that specialist or innovative books may therefore not be published at all. Publishers do of course have commercial imperatives, and some of the most prestigious of them are apt to say that scholarly excellence is a necessary but not sufficient condition for deciding to publish a book: for if their books do not generate revenues sufficient to cover their costs, with a surplus for re-investment, publishers will go out of business. There may thus be for university presses in particular a tension between their mission to publish original and even esoteric scholarship on the one hand, and their need for financial viability on the other. But nor is it *necessarily* a service to scholarship to put books of only very limited appeal through all the various processes of 'publishing' in the traditional way.

99. Such considerations may have an impact on the types of books publishers decide to publish. Single-author monographs of 80-100,000 words—from early career researchers (ECRs) and

established authors—form the core of the lists of most academic book publishers. But monographs in subject areas such as modern languages have become more difficult to publish in traditional ways, as demand for them has fallen in line with the decline in the numbers of relevant departments, academic staff and students in the English-speaking world (associated with the rise of English as a global language of communication). Publishers are also aware of concerns about perceived difficulties for ECRs in securing publication in traditional form of first books derived from doctoral theses, particularly when those theses might already (in response to university or funders' requirements) be accessible via online repositories. The publishers we spoke to all stressed that they *do* publish books based on theses, and are keen to do so, since they wish to support authors who may come back to them in the future. But they are all clear that a thesis is not a book; if the work is to become publishable, authors must therefore move beyond the confines of the thesis, rewrite, restructure, and enhance it, and expand its focus so that it is of interest to a wider audience.

100. There are also signs that edited collections are becoming less popular with publishers; they can be complex for editors to handle and control, and sales have tended to decline at a sharper rate than for monographs. The market for edited collections of previously-published essays and articles has fallen particularly sharply, as digitisation of backlists and of journals has become more common. Moreover, some publishers suggest that while collections of newly-written essays may have some value, particularly in interdisciplinary areas, they are becoming more difficult to market unless it is very clear that the whole is greater than the sum of the parts. Others suggest that such collections might more suitably be published as a special issue of a journal, rather than as a stand-alone book. Costs and editorial complexity, along with a severely restricted sales potential, also mean that only a relatively small number of

publishers—CUP and OUP above all in the UK but also some of the larger commercial presses—are now willing and have the resources to handle the publishing of large-scale critical editions. Digitisation and the web have fundamentally changed the ways in which such editions are created and presented to readers; but only a limited number of publishers have the resources and expertise to provide infrastructure such as that provided by Oxford Scholarly Editions Online.

101. Publishers are also raising questions about length, and whether the 80-100,000 word monograph should always be regarded as the standard way in which long-form treatment of a topic should invariably be packaged. Most publishers are reluctant to publish books of greater length, not least because of concerns about costs (and therefore price). Publishers such as Palgrave (following the 'digital shorts' published by American university presses such as Princeton, but publishing in print as well as digital format) have started to commission shorter books of 25-50,000 words, with the advantage also of a much shorter time from submission to publication (and usually higher sales); while others are beginning to think about packaging their content in different ways for different audiences, particularly in the digital environment, with access to individual sections and chapters. More radical suggestions to encourage authors to re-structure their material so that, for example, their discussions of methodology and presentation of detailed evidence might be separated from their core narrative and argument, have as yet made little headway.

2.6 Print and e-books

102. Almost all the publishers we spoke to assume that in responding effectively to market demand, they will be producing both physical print and e-books for the foreseeable future. As we set out in Section 5, all except some of the smaller publishers are now publishing most

if not all of their books in both physical and digital form either simultaneously or with a short delay before publishing the e-book; and in those cases where they are not doing so, it is mainly because of issues to do with clearance of rights for third party material such as illustrations. Publishers are also seeking to develop more efficient workflows based on XML files from which they produce both physical and digital books in a variety of formats; none is quite there yet.

103. Providing books on digital platforms, whether their own or those of aggregators, involves risks for publishers of some loss of control over their content. They differ in their attitudes towards such risks: some publishers have abandoned the use of digital rights management (DRM) technologies on their own platforms, while retaining them on aggregators' platforms; others retain them on both. This reflects in the main their attitudes towards the risk of piracy: some are very concerned indeed, not least in response to the appearance of academic books on the SciHub platform; others are much more relaxed.

104. Publishers differ again in their attitudes towards 'enhanced' e-books, but there is a good deal of experimentation in partnership with authors from the digital humanities community. There are technical and other barriers to overcome, not least additional costs; and a need for new skills from authors and editors if they are to produce fully-integrated multimedia content rather than text-plus-something-else. None of the problems is insurmountable, but they are an impediment to publishers' ability to invest in interactive and multimedia books on any scale at present; one-off examples with bespoke processes are not scalable, nor is it clear whether shared platforms and/or tools for publishers such as the Manifold Scholarship tool whose development has been funded by Mellon (Enis, 2015) will achieve significant take-up.

2.7 Conclusion

105. In operating at the interface between authors and readers, academic publishers are seeking to respond to significant changes both in the academy and in the broader digital environment, where there is an increasing expectation that content 'wants to be free'. Apparent stability and diversity in the landscape of academic publishing in the UK and the US are thus accompanied by increasing questioning of the roles and the value proposition of publishers, and by increasing pressures arising from falling sales per title.

106. High-quality content is at the heart of what publishers provide for authors and readers. But the challenges they already face—to sustain their reputation for the scholarly quality and presentation of the titles they publish; to develop new tools, service offers, and models; to ensure their titles are effectively marketed and distributed; and to ensure they generate the revenues to develop and sustain their services for the future—will become more difficult over the next decade.

107. Perhaps the most profound issues publishers need to address for the future in concert with representatives of the academy are precisely what services—selection, quality assurance, editorial support, design, production, sales, marketing, distribution, copyright protection, and so on—they should provide, at what level, for different kinds of long-form content, digital or in physical print form, multimedia or text-only, multi-authored or single-authored. Clarity about the services to be provided by whom in different circumstances, and the benefits likely to be derived from them, might help to clarify also some of the current questions about the sources of revenues to meet the costs of those services.

3. Academic Library Perspectives

3.1 Introduction

108. Like publishers, academic and research libraries act as an interface between authors and readers, and they have played a critical role in systematically collecting, providing access, and preserving academic books over many centuries. We do not need to labour the point that purchasing by academic libraries is a major component in the market for academic books. But like all elements in the academic book ecology, libraries have changed and continue to do so. Their central role in providing access to academic books and other scholarly sources of information has been called into question by the rapid development of user-friendly and often freely-available web-based services, like Google, Amazon, and Wikipedia. Together with developments in OA, these services offer a prospect where the close association between books and libraries may not hold as firm for the future as it has been in the past.

109. Academic libraries are increasingly seen as 'enablers' in delivering their universities' strategies for teaching and learning, and for research, with their success judged in terms of their effectiveness—and cost-effectiveness—in supporting and delivering those strategies (Atkinson, 2016). Libraries have of course always seen themselves as fulfilling a central role in supporting the scholarly activities of universities; and it is often suggested that perceptions of the quality and scope of a university library's collections and services contribute significantly (positively or negatively) to a university's reputation and its ability to attract and retain top researchers, especially in the arts and humanities.

110. Traditionally, the focus has been on collections, the size and intensity of which have been seen as key indicators of the significance and value of individual libraries. Most librarians, researchers and senior managers in universities still see their collections as the primary

means through which libraries support research and scholarship; and many research-intensive university libraries benchmark themselves against each other in terms of content provision (Research Information Network and Research Libraries UK, 2011). Libraries' 'special collections' of material with potential to support research projects in specific subject areas can be of particular importance. But under the pressure of financial constraints, the need to provide more study spaces (often at the expense of shelving space), and the shift to making content available online, libraries are aware of the risk that they become seen as expensive repositories of books that are not much used: as gatekeepers rather than enablers. There are thus concerns about the ability of research libraries, as they seek to respond to these developments, to sustain one of their traditional roles in building and sustaining high-quality and comprehensive collections of research content, the value of which may not be evident for some time after it has been purchased.

111. An increasing number of libraries have sought more actively than in the past to engage with researchers, to participate directly in research projects, and to develop new research support services throughout the research lifecycle, in areas including advice on scholarly communications; OA repositories and the payment of article processing charges; bibliometric and citation services; research data management; and the development of library publishing services. There is as yet no common model or approach to the development of services of this kind, or how to map them onto the needs of researchers while at the same time complementing the wider pattern of services from other providers within and beyond the university. Some libraries realise that the more ambitious aims to create and fulfil new kinds of roles will demand new kinds of skills from librarians, with the need to build stronger relationships and partnerships with individuals and organisations—including publishers—beyond the library (Kamposiori, 2017). But such

ambitions reflect both a search for ways in which libraries can add value to the research activities and performance of the scholarly communities they serve, and a shift away from a single focus on collections and collection development. Libraries are also increasingly interested in mechanisms and measures to demonstrate their value, in terms not only of take-up and usage, but learning and research outcomes.

112. In these kinds of contexts, libraries are increasingly seeking greater efficiencies in their procurement and acquisition processes, and more evidence-based—sometimes collaborative—approaches to sustaining and developing their collections of books and other materials. The aim is to ensure that they meet the needs of their users more effectively, and also to reassure senior university managers (on whom libraries depend for their funding) that they are indeed providing effective support that underpins university performance in teaching, learning, and research.

3.2 Collection development

113. The creation and management of collections of high-quality scholarly content, designed to meet the needs of their users, nevertheless remains a distinguishing characteristic of academic libraries. Books play a critical role in such collections, which are managed and curated through cycles of selection and acquisition; arrangement, classification, and cataloguing; monitoring of usage; review, and (often) disposal.

114. Collection management and development thus remains a big issue for university libraries. Larger research-intensive universities in the UK spend £millions a year on information resources, using a combination of library suppliers, subscription agents, aggregators, and direct purchase from publishers. Total expenditure on resources of all kinds across the UK members of the UK Society of College and University Libraries in 2014-15 (SCONUL, 2016) amounted to over

£317m. Expenditure on books, however, has tended to fall in real terms, as expenditure on serials and on databases has risen. Between 1999 and 2013, book expenditure fell by a quarter, while serials expenditure rose by three-fifths. The result was that serials accounted by the latter date for a fifth of total library expenditure, while books accounted for under a tenth. (Research Information Network, 2010; LISU, 2015). SCONUL statistics no longer distinguish between expenditure on books and serials, but there is no reason to expect that these trends have stalled; rather the reverse. And there is a clear shift in expenditure in favour of electronic resources and away from physical print: in 2013-14 electronic resources accounted for 73% of expenditure on information provision, as compared to 45% in 2003-4; and a recent unpublished study by Jisc indicates that 'digital by default' is the policy in most UK universities as in many other countries. Data from the US suggests that sales to libraries fell by 24% between 2011 and 2015, with a sharp fall in sales of physical print books only partly offset by a rise in sales of e-books (Morris-Babb, 2016). This shift in favour of e-books is taking place despite users' preference for print when reading books, a preference noted by at least some librarians (Kamposiori, 2017; Library Journal, 2016; Wolff et al, 2016).

115. The stock of physical books catalogued in the libraries of all the UK members of SCONUL stood in late 2015 at 97 million; and nearly two million physical books were purchased in the academic year 2014-15. But libraries purchased or subscribed to nearly 42 million e-books (including those titles they had purchased outright in previous years). On average, the proportion of library stock accounted for by e-books more than doubled between 2009-10 and 2013-14, though there are signs from the US that earlier rates of increase in stock and expenditure are slackening (Library Journal, 2016). These changes are driven by a number of factors, including the increasing availability of e-books in packages from both publishers and

aggregators, although libraries express frustration that many titles—– especially from back-lists—- are not yet available as e-books. Nevertheless, it is clear evident that changes in supply generate changes in demand: the average number of loans of physical books per FTE user fell by nearly 10% between 2003-04 and 2013-14, while it is clear (despite some problems with the usage data supplied to SCONUL) that usage of e-books per staff/student FTE usage of e-books has risen exponentially, so that it was by 2013-14 double that for physical book loans (SCONUL, 2015), and evidence suggests it has risen still further since then. (Some caution should be expressed about such figures, however, since we have no comprehensive data on which kinds of books—text-books, course readers, and so on as well as monographs—are being used and in which subject areas.)

116. There are, of course, significant differences between libraries. Tthose in research-intensive universities that are members of Research Libraries UK (RLUK) have on average stocks of physical books nearly eight times larger than the libraries of the newer post-1992 universities;, and they are acquiring new physical books at more than three times the rate (and e-books at two-and-a-half times the rate) of the new universities. RLUK libraries are also acquiring e-books at two-and-a-half times the rate of their new university colleagues. Moreover, even though the expenditure of RLUK libraries tends to be on average lower as a proportion of total university expenditure than in new universities (reflecting their much larger expenditure on research), average expenditure, and also new additions to stock, per FTE user are on average much higher. The average level of both loans of physical books and of usage of e-books per student also tends to be higher in RLUK libraries, though the number of access requests per e-book tends to be lower (reflecting perhaps the higher number of e-books available). It should be stressed, however, that even within the different groups of libraries, there are huge variations in expenditure, stock, acquisitions, levels of

usage, the balance between physical and e-books, and trends in all those variables. Just as there is no typical publisher, there is no typical library.

117. But there are clear trends in collection development across libraries, driven by five interrelated factors. First, there is a growing realisation that as the numbers of books, journals, and other materials continue to rise, it is impossible for even the best-funded library to acquire everything, or to seek fully-comprehensive collections even in clearly-defined subject areas. The constraints on the space available to shelve physical print books add to the difficulties. Where some libraries used to aim at comprehensiveness in at least some areas, and prided themselves on the size and scope of their collections, the search is now for the right books that fit best with their university's research, teaching, and learning activities and strategies.

118. Second, alongside the drive to be selective rather than comprehensive, there is the search for value, which at a basic level means trying to make sure that the library acquires the books that are the most relevant to its users' needs, as well as easily accessible and usable. But it also implies a drive for value for money, and examining issues such as return on investment. Hence the increasing interest in data-driven approaches both to acquisitions, and to monitoring the post-acquisition value and impact of the collection. Data-driven acquisitions may involve building structured profiles of departments or subject areas from internal and/or external sources and working with publishers or suppliers to create from those profiles lists of books to be acquired, checked against existing holdings. Other approaches are built around tools to develop profiles of existing collections, and comparisons with the collections in comparator institutions, consortia, or broader national collections. In both these ways, libraries are seeking to develop a better understanding of what they have already, how it maps against the

strategic priorities of the university, and the areas of strength (or weakness) that they may wish to develop. There are challenges in such approaches, which depend critically on the quality of the metadata available, particularly in relation to interdisciplinary areas, where comparisons are particularly tricky; and the mapping of collection data against other sources of information about the university and its activities is not straightforward. Dynamic linking, and combining multiple sources of data can be especially difficult. For post-acquisition evaluation, COUNTER statistics on usage of e-books can be particularly useful, and so long as the right reporting codes are included in bibliographic records, tracking data on the loans of physical books can also be valuable. Different kinds of usage data for e-books—sessions, views, downloads, copying, printing—can be benchmarked in different ways and at various levels of aggregation. But handling, manipulating, and analysing such data demands new skills from librarians, not least an ability to conceptualise the kinds of questions to ask, and how they might be answered. In that context, it remains far from clear, for example, how to assess the value of scholarly books in different subject areas, or to judge what might count as 'good' levels of usage. The increasing efforts to assess linkages between students' use of the library and its collections on the one hand, and their academic progress and performance on the other, are stimulated not least in the UK by the forthcoming Teaching Excellence Framework. But such approaches may not extend easily to research performance, especially in the arts and humanities (and not only because the citation data that is so commonly used—though controversially—in the sciences is simply not available in comprehensive fashion in the arts and humanities to make it at all persuasive as a measure of performance). Attempts in the US to develop measures of return on investment by tying academics' use of library resources to the generation of research grant income have not been convincing; and an examination in the

UK of the relationships between library expenditure, content usage and measures of research success was suggestive rather than conclusive (Research Information Network, 2011).

119. Third, there is the search for greater efficiency. Books relating to taught courses are increasingly handled through the use of web-based reading list management systems such as Talis Aspire, which enable academics to create and manage lists and make the material on them available to students, through links to the library catalogue and to e-books. From the library perspective, they make it possible to centralise the acquisition of books on the lists, and to try to ensure that they are accurately described and discoverable. Some libraries have developed sets of rules or criteria which enable them to determine simply which books—and how many—they will acquire in print or digital format, distinguishing, for example, between undergraduate and postgraduate courses, as well as between different disciplines. Libraries have also sought to simplify other acquisitions, by facilitating direct online order requests from academics (and in a study undertaken by Anna Faherty for this project on how academics discover and gain access to books, such systems have been praised by those academics who use them, although libraries and their suppliers cannotfind it difficult to match Amazon-type supply times). Libraries are also streamlining their back offices with a shift from library management systems to library service platforms, with more integrated workflows, and easier interoperability with other university systems including finance and student registries, and greater capacity for data capture and analytics. The aim of all these moves is to standardise and automate acquisitions as far as possible; for librarians to intervene in the process only when needed, (curiously, while their intervention usually extends to ensuring that they acquire any book published by a member of the university's staff, this is by no means always the case); and to pass more of the collection development effort onto

library suppliers and publishers. Demand-driven and evidence-based acquisitions (DDA and EBA), along with approval plans, are thus a key part of the response to the drive for cost-effectiveness, as well as to ensure that the library acquires the content that users need (Section 9.3).

120. Fourth, a growing number of libraries have restructured their staff and their services, with a strong move away from subject librarians who provided a range of services to their subject communities—collection development being but one—and towards teams providing specialist services for research and for teaching and learning across the university as a whole. The development of OA services—including advice and advocacy, the running of institutional repositories, and payment of article processing charges (APCs)—has been a significant driver for such restructuring; but the key point here is that the restructuring has itself been a driver to centralise collection development in a small specialist team, to automate it as far as possible, and thus to reduce or eliminate the role of subject librarians in this area. Rather, there is a recognition that academic members of staff have the most detailed subject knowledge, and that collection development can work better when liaison librarians form effective links between academic staff and the collection development team.

121. Finally, there is an increasingly capacious view of what collection budgets should cover, in the light of the aim that collections should deliver value beyond the content that is purchased. Thus, in a number of libraries, the collection development team spend significant sums on analytical tools and services, on discovery and preservation services (on CLOCKSS, for example), and on initiatives such as Knowledge Unlatched. In this way, purchasing decisions are set in a more strategic context which may put as much value on services as on collections. In the most radical case, at MIT, the library has subsumed collection development under its scholarly

communications budget, with the aim of making purchase decisions strategically in ways which support moves towards OA.

122. All these developments mean that libraries are seeking to become smarter in their decisions about which books to purchase, in what format; and that the processes involved, and the relationships between libraries, publishers and suppliers are changing, and will continue to change. Various projects are in hand which aim to help librarians and readers to find and to access books more effectively, especially in digital format (Jisc 2016). It seems unlikely, however, that such measures will lead to significant increases in the numbers of books libraries purchase; or that the downward pressure on the funds available for book purchases will change in the near future. It is widely acknowledged that libraries are not the main source researchers make use of for books (as distinct from journals); they obtain them by borrowing from colleagues, by visiting other libraries, or by purchasing copies themselves (Tenopir et al, 2012).. In this context, it is critically important that libraries should increase their efforts to sustain open dialogue with a wide range of both academics and publishers, and indeed with the key agents in the supply chain

3.3 Discovery and access in libraries

123. Libraries are very much aware that it is currently not always obvious to readers which books are available to them, or could be readily made available. The huge popularity of Google and similar search engines has led libraries to adopt web-based discovery systems for their contents too. These have marked a considerable step forward, as compared to previous library systems under which users often had to search separately for resources in individual collections. Providing access to almost all library resources via a single interface linked to full text for digital content, and with the ability to embed the search box into virtual learning environments (VLEs), reading

lists, and so on, is seen as particularly attractive to undergraduates, and valuable also in ensuring that the library sustains its visibility. And there is evidence that the implementation of such systems has had a significant influence in increasing the usage of e-books.

124. But such systems bring challenges too. Simple unified search interfaces tend to be geared more to undergraduates than to postgraduates and academic staff, who are often advised to use specialist databases to search more effectively for relevant sources. Indeed, Anna Faherty's study for this project, along with other studies (Tenopir et al, 2011), suggests that academics are at best equivocal and divided on the utility of libraries and their discovery systems for finding books, and that many of them continue to use Google, Google Scholar, Google Books, Amazon, and other non-library sources in their search for books. Moreover, there are technical challenges relating to how much content is actually discoverable, and, how it is displayed. We discuss these further in Section 9.6.

125. Such factors can affect levels of usage and the user experience for e-books in particular. But libraries also have to confront a further series of issues in purchasing e-books for their collections. First, they must choose between publisher platforms that provide access to only those e-books published by that particular publisher, or aggregator platforms such as ProQuest EbookCentral (incorporating ebrary, EBL and MyiLibrary), EBSCO eBooks, or Dawsonera, that host books from a range of publishers. There are also more specialist aggregators such as Project Muse and JSTOR Books, which aggregate titles from university presses. Libraries' choices about aggregator and publisher platforms are made more complex by the availability on the various aggregator platforms of differing but overlapping subsets of the books from each publisher. Thus in order to achieve satisfactory coverage in a specific area, libraries may have to purchase packages from two or more aggregators, with significant overlap between them; and the precise contents of individual

packages can change at short notice (or with no notice at all). Reducing levels of duplication and unnecessary expenditure is thus a challenge, exacerbated by the variety in the features on different platforms. Again, we discuss this in more detail in Section 9.3.

126. Second, libraries have to decide whether to purchase title by title (which may not always be available), or in packages, and on the purchase model: demand-driven or evidence-based acquisition (DDA or EBA); short-term loan (the cost of which may contribute towards the cost of outright purchase); and outright purchase (the preferred model for many librarians, since it implies perpetual access) or time-limited subscription. Libraries can license content under any of these models, and the licences vary too: single-use licences that limit use to one reader at a time; multiple use licences; or non-linear lending licences, which restrict to a defined number of uses a year. DDA puts users in charge of purchasing titles when they need them, and access is immediate, since under the DDA model metadata records are loaded into the library's discovery system in advance, and it is usage that leads to the payment of fees to the publisher or aggregator. Under the EBA model libraries pay an upfront fee at a discount to the full cost of a collection, and users have access to the collection for an agreed period (usually a year), at the end of which the library decides which titles to purchase, based on levels of usage or other criteria. Pricing for these different models varies considerably; and while publishers are concerned that their e-book revenues do not adequately fill the gap left by declining print sales, libraries chafe at the costs of many of the choices they have to make. Decisions about which model suits a particular library depend on individual circumstances and on particular collections or aggregations; and they have to be kept under constant review. For although libraries are turning increasingly to user-driven acquisition models, some publishers have reported to us a significant reduction in their use of

such models (Library Journal 2016; and again see Section 9.3 for a more extended treatment of these issues).

127. Finally, in seeking to develop their collections and services, libraries have to respond to the increasing demand for study space of varying kinds: what meets the needs of undergraduates may not meet the needs of postgraduates or, still less, of academic staff engaged in the intensive study of material in special collections (which may often have to be studied in the library itself, rather than borrowed).

3.4 Shared services

128. The development of shared services has been an important priority for libraries in both the UK and the US in recent years; and many librarians see the need for more active co-ordination at national and international levels in managing their collections and services. In the US, for example, the Hathi Trust is a collaborative venture of more than 60 research libraries which has built a large-scale collaborative repository of books digitised by the Google Books project and many other local and co-operative initiatives. Its aims are to ensure the preservation of this material; to improve access to it, with an infrastructure to facilitate scholarly usage; and to facilitate co-ordinated strategies for the shared storage of that material. There are some 14 million titles in the database, over five million of which are in the public domain. Bibliographic data is freely available, along with full text access to the public domain material; and logged-in users can create personal "collections" by grouping selected search results, saving them for subsequent use and sharing with others. Other collaborative initiatives include the Digital Public Library of America, and efforts to develop a national digital platform for libraries and museums.

129. On this side of the Atlantic, libraries have collaborated in the creation of the European Library as a virtual distributed collection. In the UK, there is a long history of reviews and initiatives aimed at fostering

collective management of collections, from the Parry and Atkinson Reports (University Grants Committee, 1967 and 1976), the two Follett Reports (Higher Education Funding Council for England et al, 1993 and 2003) and the Anderson Report (Anderson, M, 1996). Currently, there is renewed interest in the development of shared services for books as part of a National Monographs Strategy. The initial focus is on creating a National Bibliographic Knowledgebase, with the aim of identifying, and building an infrastructure to provide access to, a distributed national research collection. It will thus seek to create an aggregated database of UK libraries' print and digital holding; and a key objective, following earlier stalled efforts to facilitate collaborative collection management, is to help libraries manage their printed book collections more effectively, through a better understanding of what is rare and what is common. But it is also planned to make the database open to other organisations so that they can provide new and better layers of discovery services. The knowledge base will include records from the legal deposit, academic and other specialist libraries, along with OA book directories. It will also include data on the availability of titles from libraries; publishers, and aggregators (via subscriptions and licences); and third parties such as the Hathi Trust or Google Books. The knowledge base holds the promise of making it easier for libraries to discover, acquire, and manage e-books; to clarify licensing rights and permissions relating both to e-books and print material that might be digitised; to facilitate discovery and delivery of the most accessible versions of scholarly titles; and to integrate with other services to improve discovery, management, and analysis of content collections (Grindley, 2016). Building such a knowledge base will require co-operation not only across academic libraries, but with publishers, distributors, and aggregators, nationally and internationally. Technical issues such as metadata standards, and organisational issues such as governance and business models, have

yet to be clarified. If the plans are brought to fruition, however, they could have a profound effect on availability, discovery, and access for both print and e-books.

3.5 Curation and preservation

130. At least some academic books retain their value for hundreds of years. In considering academic books of the future, we must therefore consider preservation and access for books of the past, and for a (very) long time. Most academic and research libraries manage their collections actively; but they have always seen curation and preservation of the scholarly record, in the form of monographs and other academic books—, alongside other forms of content—, as a key part of their role. The physical collections of some major research libraries may be more comprehensive than those of the publishers from whom they originally acquired the books (some publishers, of course, have gone out of business). And many research libraries have played—and continue to play—key roles in gathering and preserving special collections of books that are of national and international importance for research in specific subject areas.

131. One of the key drivers behind the moves for libraries in the UK to collaborate in collection management has been a concern to ensure that appropriate numbers of copies of the books held by libraries across the country are preserved and made accessible for the long term. Thus, there are renewed discussions about the possibility of extending to monographs something akin to the UK Research Reserve (UKRR) initiative, which has operated since 2007 as a partnership between the British Library and thirty university libraries to create a distributed shared collection of the printed copies of scholarly journals; and at the same time to enable libraries to dispose of little-used copies safe in the knowledge that they have created that shared collection. Extending the UKRR model to monographs would not be straightforward, not least because the

numbers of individual titles, editions and unique copies are by orders of magnitude greater than for journals; and initial studies (Malpas et al, 2016) suggest that rarity is common. But we strongly support recent moves to give detailed consideration as to how it might be done as part of the National Monograph Strategy mentioned above.

132. In a digital and online world, however, curation and preservation must be handled very differently from what applied when libraries held books only in physical printed form. Since libraries in many cases do not themselves hold the digital files to which they provide access, they must rely on trusted independent third parties to preserve digital content. The key services are thus currently provided at a global level by two organisations—Portico and CLOCKSS—which operate as partnerships with membership and funding provided by both libraries and publishers; and it is important that they should continue to operate in this way, alongside the preservation services provided by national libraries such as the British Library (BL) in the UK (under the Legal Deposit Libraries (Non-Print Works Regulations, 2013) and the Koninklijke Bibliotheek (under voluntary agreements with publishers) in the Netherlands. For the effective operation of all these services depends on trust and shared responsibilities, reinforcing the value of libraries as archival and memory organisations, and providing insurance against the risks that scholarly material might be lost forever when a publisher goes out of business, or when there is some catastrophic failure which renders the files held by a publisher unusable. Issues relating to digital preservation are discussed further in the separate Project Report (2017(ref required).

3.6 National libraries and their roles

133. The traditional role of national libraries has been to create and provide access to a usable comprehensive collection (an archive) of

the works published in the country, generated usually by legal deposit. They have also traditionally sought to develop by purchase major collections, in key areas of research and scholarship, of books published outside the country. Through these two mechanisms, and by developing a leadership role across the library sector, they have become a key element in national research infrastructures, especially for the arts, humanities, and social sciences.

134. Like other libraries, however, their role is changing in the online world. In the UK, it has taken several years effectively to develop and implement across the BL and the other legal deposit libraries an effective regime for the deposit of the many different kinds of digital works, and some practical difficulties remain to be fully resolved. National libraries' leadership roles—preserving and making accessible the national archives of published content, while at the same time developing and sustaining a range of other services—are thus coming under strain. Legislative regimes mean they can rarely meet researchers' expectations by providing remote access to legal deposit material, which can be accessed only on-site; and they face challenges in developing the kinds of platforms that will enable scholars to access, analyse, and manipulate 'enhanced monographs' and many other kinds of scholarly content from a range of sources, or to work collaboratively with other scholars in so doing. Many national libraries also face budget constraints, alongside pressures to develop and/or sustain services for non-scholarly audiences; and some of them are having been more selective in seeking to develop their scholarly collections by purchase.

135. A strength but also a challenge for national libraries is their independence from the individual universities within which most research libraries are located. National libraries can thus take a broader view of the needs of different research communities in building up their collections and services; but they need perhaps more than university libraries to guard against the risk of becoming

remote from those communities, less responsive to changes in attitudes and behaviours, especially when researchers can make use of such extensive content and services quite outside the library environment. It is therefore important that national libraries should take active measures where possible to engage and partner with scholars in research and scholarly projects. It is important too that they should seek to engage—in concert where possible with representatives of the scholarly community—with the arms of government which are active in the development of research policies and priorities, responding to, and seeking to influence, policy and funding changes, for instance in relation to OA. In the UK, the BL's co-operation with the AHRC in the sponsorship of this current project is a valuable example of what might be done more often; but the BL needs more capacity and resources if it is to engage more widely and deeply with the research community as we suggest, and participate actively and more regularly in its projects

3.7 Libraries as publishers

136. Libraries have long records in publishing works that arise from their own collections and activities. Some university presses originated within libraries; and in the US, libraries have been prominent in establishing aggregators such as Project Muse, and publisher platforms such as HighWire. More recently, a number of libraries have seized the opportunities opened up by technological developments, and by their successes in running institutional OA repositories, to create their own publishing infrastructures and programmes. Libraries' motivations for so doing are various: to provide concrete services to authors, set in the context of libraries' developing a range of specialist services for researchers; to align library services more closely with institutional strategies; to respond to continuing high prices for scholarly content, and libraries' diminishing ability to afford them; to liberate publishing from the constraints of commercial decision-making; and to support moves

towards OA. In a key sense, they seek to build on the analysis presented in a report (Crow, 2012) commissioned by the Association of Research Libraries (ARL) and the Association of American Universities (AAU) which claims that the market for academic monographs is fundamentally broken, and that viability cannot be restored without decoupling decisions on publishing, and on scholarly quality, from commercial considerations.

137. The Library Publishing Coalition has some seventy members, mostly in North America but including UCL in the UK; and its directory (Lippincott, 2016) includes 115 libraries, ten of them from outside North America. In the UK, 17 library publishing programmes have been identified (Keene et al, 2016), and some ofat least three of them (including Huddersfield, Manchester, UCL, and UWE) have joined the Coalition. Its definition of publishing is broad: "activities…to support the creation, dissemination and curation of scholarly, creative, and/or educational works". The nature and scale of the activities vary widely. Almost invariably, library publishing programmes involve close partnerships with university departments, and often individual academics; and the focus is for the most part on content produced within the host university. In some cases there is a desire to engage with multimedia and 'non-traditional' modes of publication. Often, there is a commitment to the support of teaching and learning, with the publication of open educational resources, or student research journals; and/ or to the support of research through the publication of dissertations, working papers, research data, or digitised copies of special collections and archival material, as well as specialist journals and monographs. As a recent report observes (Okerson, 2015), the boundaries between publishing and less-formal activities are fluid and contestable.

138. Journals figure prominently among library publications, but the Coalition's most recent directory also identifies over 700 monographs published by libraries, three of which—California,

Cornell and Indiana—are responsible for more than three fifths of them. Library publishing of this kind sometimes involves partnership with the university press, building on informal and formal organisational relationships where such exist. But partnerships may involve external presses, as in the example where the University of Utah library published a collection of archival material closely related to a monograph published by OUP (Anderson, 2015).

139. The current scale of the activities is for the most part modest, often involving only one or two members of staff. And funds to support the programmes come in the main from library or other institutional budgets, or from grants. Only in a few cases are fees charged to either authors or readers. Production costs are kept to a minimum, with only a minority of programmes providing copy-editing or typesetting; and while there appears to be confidence that programmes can be sustained at their current level, they will need additional funds if they are to expand. With many competing pressures on university and, more specifically, library budgets, the source of such additional funds is not obvious. Moreover, while some programmes take care in creating high-quality metadata, it is striking that relatively little attention is paid to marketing. It is thus not clear to what extent library publications are reaching their intended audiences, nor whether there are opportunities to expand the scale of operations with a more diverse range of funding sources; this is an area where co-operation with publishing professionals is likely to be of critical importance for the future. Hence some librarians are now attaching greater importance to developing a deeper understanding not only of academic and research processes, but of publishing practices too; and to establishing strong relationships with publishing and other partners (Kamposiori, 2017).

140. The ambitions of some library-publishers to completely refashion completely the scholarly communications landscape and overcome their concerns about the costs and inequities of scholarly publishing

as it stands at present, imply a large and rapid expansion of their current programmes. Such ambitions are evident in the proposals discussed by the ARL to 'bring scholarly publishing back home to the academy' with a 'shared-infrastructure press' (ARL, 2014). What part library publishing initiatives will play in achieving such ambitions, is as yet not clear. But it seems likely that library publishing will continue to develop as part of the landscape in a variety of ways, reflecting libraries' and universities' individual circumstances, strategies, and priorities. Thus they will no doubt develop along different paths; and some will prove to be more fruitful than others. For the present, they provide a potentially-very-useful locus of innovation in the broader ecology of scholarly publishing.

3.8 Conclusions

141. The roles of academic libraries, and how they perform those roles, are changing significantly; and the pace of change is unlikely to diminish for the foreseeable future. Collection development, and the provision of access to quality-assured content from publishers, remain of fundamental importance. But the proportionate part that books—whether monographs, edited collected, or scholarly editions—play in library collections and acquisitions, is likely to continue to fall; and the shift towards e-books and away from print will continue too. Moreover, changes in the processes and decisions involved in acquiring and providing access to books will continue to bring changes also in the relationships between libraries, publishers, and suppliers.

142. But such changes are set in a wider context of developments in the online world which mean that libraries—like other intermediaries between authors, texts, and readers—are having to rethink and redevelop their roles. Hence the moves to develop new kinds of services for both students and researchers as both producers and

consumers of information resources of many different kinds and from many different sources: data, digital objects, and multimedia in varying formats, working papers and grey literature, as well as formal peer-reviewed publications. There is as yet no clearly-defined model for the provision of such services. Success for individual libraries is likely to depend on the extent to which they can adapt to and exploit the specifics of their individual environments; and there remains the risk of growing disintermediation in a world in which for many scholars the role of the library is increasingly unseen and/or ill-understood, and information resources more readily accessible than ever before. In such a context, as book-like resources proliferate in many different forms and via a variety of routes, libraries may have to think further about their roles, and in terms of connecting to such resources rather than collecting them. That in turn will bring further changes in their relationships with authors, publishers, readers, and all the other players in the supply chain. Hence it is critically important that libraries should redouble their efforts to build open lines of communication and active consultation with as wide a range as possible of the academics that they seek to serve; and to ensure that those academics have as many opportunities as possible to influence the development of library policies, collections, and services.

4. Intermediaries: distributors, library suppliers, booksellers, and others

4.1 Introduction

144. Publishers and libraries are not the only intermediaries between authors and readers. There is a complex supply chain that moves either physical or digital copies of books from publishers into the hands of purchasers and readers. Moreover, the complexity has grown rather than diminished as a result of new technologies, not least the advent of e-books; and there is a continuing quest for greater efficiency and speed, with reduced costs, throughout the chain. But success for all the agents in the chain depends on building strong professional relationships with each other, and adapting quickly to changes in the market. Some agents specialise in the requirements of the academic book market; but for the most part, academic books are treated as but one part of the outputs of the book industry as a whole. These complexities have been exacerbated, in the UK and elsewhere, by a remorseless increase in the numbers both of academic and of other specialist and trade titles. At the same time, the specialist players in the chain have to respond to changes in the academic environment, including funding constraints, the increasing use of VLEs, and changes in the behaviours and motivations of students and academics.

4.2 Bibliographic data

145. The chain from publisher to reader—for both printed and e-books—starts with the supply and transmission of bibliographic data from publishers to a range of agents in the chain; and specialist database providers such as the British Library, Nielsen, and Bowker play key roles here, alongside standards organisations which bring together representatives of the key players in the industry such as Book Industry Communication (BIC) and Editeur. Getting the data right, and transmitting it speedily and effectively, is critical to ensuring

that all the key players in the chain, as well as potential end-users, are made aware of all the books that are currently available (both front- and backlists). For the retail sector, it is critically important that accurate and comprehensive information about books and their current availability is linked into bookshop ordering, stock management, and electronic point of sale (EPOS) systems. Wholesalers, distributors, library suppliers, and aggregators need similarly accurate and comprehensive information if they are to fulfil their roles in the supply chain. And libraries need bibliographic records that accurately identify individual titles and editions in their collections. The difficulties and inadequacies associated with metadata are explored in Section 9.6.

4.3 Distribution of physical books

146. The largest trade publishers tend to run their own in-house services to distribute physical stock to booksellers and libraries; and some now have web-based e-commerce systems which allow individual consumers and libraries to purchase direct from the publisher. At present, direct sales form a relatively small proportion of all sales, but many publishers are actively seeking to increase that proportion. Smaller publishers, however, may lack the resources and pulling power to attract potential purchasers to their sites, although there are some small-scale attempts at developing collaborative e-commerce platforms. But for the most part, small publishers tend to rely on specialist distributors and wholesalers—in some cases themselves subsidiaries of larger publishers—with their own warehouses and logistics services. The precise nature of the services offered by such organisations, and the commercial agreements between them and individual publishers, vary according to circumstances. But as Fisher and Jubb (2016) noted in their study undertaken for this project, for the retail trade, services typically cover warehousing and inventory management; metadata management; distribution and despatch of physical and e-books in

both domestic and export markets; credit control; the fulfilment of bulk and individual orders; sales analytics and management information; e-commerce services; invoicing and payments; and the handling of returns. Wholesalers meet the costs of such services by purchasing books from publishers at a discount to the stated retail price; distributors hold publishers' stock on a consignment basis, and invoice against sales actually achieved, again with discounts and against agreed credit terms. In both cases, discounts are usually shared with booksellers. Only the very largest academic publishers can handle sales and distribution overseas, and most publishers must therefore negotiate separate agreements with distributors in their key overseas markets.

147. Wholesalers and distributors ensure that the stock they hold is listed on their websites and through the databases and links they provide to booksellers (distributors such as Bertrams and Gardners supply their own ordering and EPOS systems to booksellers, as well as making their databases of available stock accessible via Nielsen's and other systems). They may also promote individual titles through newsletters and the like. But marketing and promotions remain primarily the responsibility of the publisher; this may be achieved in-house, or by outsourcing to specialist sales and marketing agents (again, usually separately for the UK and for export markets).

148. Sales to individual consumers are made, of course, through retail booksellers on the high street, on campuses, and online. In the UK, Waterstone's, followed by Blackwell's, are by far the most important chains of physical bookshops (both also operate online), although independents retain an important place in the market. Online sales are dominated by Amazon, but there are many other smaller online services such as Hive and Wordery. Both physical and online retailers fund the services they provide through the discounts they receive from wholesalers, distributors, or (in the case of online retailers) direct from publishers. And for some popular academic

titles, retailers may promote sales by passing on some of the discount to purchasers. Only the largest specialist academic booksellers tend now to devote significant resources to promoting sales of the kinds of books that are the focus of this study. Nevertheless, all booksellers must ensure that their stock reflects and responds to consumer demand, for they are uncomfortably aware that if they do not respond to readers' preferences and choices, they will not remain viable. Hence there are moves to reconfigure physical bookshops to provide a wider range of services to students in particular, and to integrate their physical with their online services, so that, for example, the services provided by a bricks and mortar shop extend to digital as well as print books, and are not restricted by the amount of stock it can hold on its shelves

149. Distribution to libraries—particularly academic libraries—tends to be handled by specialist library suppliers, which are in some cases subsidiaries or associates of larger retail and trade distributors (in the UK, Dawson, for example, is part of the Bertram group, and Askews and Holts is part of the Little Group which also includes Gardners; while in the US, Baker & Taylor provide services for both libraries and the retail market). They provide specialist facilities for librarians to search and order books, streamlining library acquisition workflows and integrating with library management systems, catalogues and discovery services. Some library suppliers provide approval plans, under which libraries receive supplies of new titles selected according to a profile of their collection interests, with the right to return what they decide not to buy. Library suppliers usually provide books in shelf-ready form, with covers, subject classification labels, barcodes and security tags, and accompanied by catalogue records in customised form. Libraries' outsourcing of this work is the key reason why library suppliers cannot meet Amazon-style delivery times. Like the retail distributors, library suppliers fund their services out of the discounts they negotiate with publishers; and

again a proportion of that discount is shared with their library customers. A UK universities procurement consortium has framework agreements with eleven library suppliers, the majority of whom provide physical books as described here, as well as e-books.

4.4 E-book distribution

150. As with physical books, publishers can sell e-books direct to consumers online, either in the form of outright sales, or as subscriptions for a limited time. But most sales and subscriptions are made by e-book vendors which aggregate content from a range of publishers. In the retail sector, Amazon is by far the dominant player, but other vendors include Google and Apple, along with smaller players such as Blackwell Learn, Hoopla, and Kobo.

151. Again as with physical books, library suppliers offer specialist services. Major academic publishers such as OUP and CUP, Palgrave, or Taylor & Francis, have developed their own platforms through which they make collections of their titles available to libraries; OUP and CUP also make their platforms available to other selected university presses. As we shall see in Section 9.3, there is some evidence that libraries are becoming more interested in acquisitions direct from publishers, since they often provide access free of digital rights management (DRM) technologies which restrict the usage of e-books in various ways; but most sales to libraries are currently made via specialist suppliers who aggregate titles from a range of publishers, and provide their own platforms, along with (as for physical books), links to library management and discovery systems. Major suppliers for UK academic libraries include ProQuest, EBSCO, and Dawson. The terms on which books are supplied range from subscription for a limited period, to outright sale; and there has been considerable experimentation with different sales models in recent years, as discussed in Section 9.3.

4.5 Digital printing and print-on-demand

152. A key change with a major impact on the relationships between publishers, library suppliers, distributors, and wholesalers (eliding the differences between the latter two) has been the rise of digital printing. Improvements in quality, the fall in costs, and the development of systems for speedy fulfilment of print-on-demand (PoD) orders are together of particular importance for titles—like many academic books—with low unit sales; and they are profoundly changing the economics of publishing such books. It is arguable that the impact to date of PoD services from companies such as Ingram and Printondemand has been greater than the advent of e-books; and as Fisher and Jubb (2016) note, Amazon has become a hugely important channel on both sides of the Atlantic in this context, working as producer as well as retailer.

153. For wholesalers and distributors, these developments have opened up the possibility of providing for publishers the kind of digital virtual warehouse with no physical books now operated by Ingram, fulfilling orders (which may come from booksellers, libraries, other distributors, or from publishers themselves) either as e-books or physical copies.

4.6 Market consolidation

154. Funding the work of the different players in the supply chain from publisher to reader can take up to 50% of the revenues from end-purchasers (either individuals or libraries). But competition is fierce and margins tend to be low; and the demands for investment in logistics and a wide range of online services, e-book platforms, and so on are relentless. Hence a key feature of the last few years—from bibliographic services through wholesaling and distribution, to retail bookselling—has been a renewal of the consolidation first evident in the 1990s. In the UK, companies such as Nielsen (in bibliographic and market intelligence services), Gardners and Bertrams (in

wholesaling and distribution for the retail trade), ProQuest and EBSCO (in library supply), and of course Amazon in retail sales, have become increasingly powerful, partly through the acquisition of smaller companies and successful start-ups. The number of agents or trade customers which a publisher, distributor, wholesaler, or bookseller typically deals with has reduced significantly in the last twenty years. Publishers, retailers and librarians have all expressed concerns about the rate of consolidation, and as of early 2017 it looks unlikely that the situation will be ameliorated by new entrants to the market: indeed, further consolidation looks much more likely. The positive side of consolidation, of course, is that larger companies typically have more resources to invest in improving the efficiency of the supply chain.

4.7 Developments in the library supply chain

155. We noted in Section 3.3 the factors that have led academic libraries to shift their focus in collection management from 'just-in-case' towards more 'just-in-time' approaches: enabling users to connect to the content they need (not necessarily collecting it), and acquiring specific titles only when there is clear evidence of demand for them. Library suppliers and aggregators have facilitated this shift through the creation of large aggregations of both physical and—more particularly—e-books, accompanied by enhanced metadata services, and the new web-based discovery and access systems.

156. Taken together, the widespread availability of e-books, along with the development of large-scale aggregations, of the platforms to gain access to them, and of web-scale knowledge bases and discovery systems, have brought profound changes to the relationships between publishers, libraries, and library suppliers. The shift in library purchasing in favour of e-books has had a major impact on publishers, libraries, and suppliers, with significant pressures on suppliers, since margins and discounts for e-books tend to be smaller

than for print, while the need for investment in platforms and IT infrastructure is considerable. This has contributed to the consolidation among suppliers and aggregators noted above, as smaller companies have been acquired by bigger ones such as EBSCO and ProQuest. It is also associated with the new acquisition models noted in Section 3.2 and in more detail in Section 9.3. But the many variations in terms and conditions associated with those models, and the frequency with which they have been modified in the light of experience on all sides, have brought difficulties for all parties in judging what works best for them and their partners. There is thus a growing literature on the relative advantages of different acquisition models, and the models themselves are changing rapidly. On the part of intermediaries, there are increasing moves towards the provision of integrated sets of services designed to exploit their economies of scale and to minimise the resources and workflows required from libraries themselves in the process of acquiring books and developing their collections, and from publishers in seeking to meet library demands. The larger library suppliers and e-book aggregators are thus seeking to expand and enhance their services at both ends of the supply chain, with value-added services for both publishers and libraries. But they are also having to respond as the positions of both publishers and libraries change: as Michael Zeoli of YBP puts it, “It is a very very interesting time—if we're able to step back for a minute and appreciate the view!”

4.8 Developments in the retail supply chain

157. Amazon has had a huge impact on all elements of the supply chain. It is now by far the world’s most important retailer of academic books of all kinds, and it is arguable that without Amazon, several academic imprints would have gone out of business. Surveys show that Amazon is the major source of book purchases for students and academics alike (Library Journal, 2016; Nielsen, 2016) as well as the wider public. It is also clear that Amazon is a significant source of

purchases for libraries (Sweeney, 2016), although UK libraries are limited in their use they can make of Amazon as a supplier, as a result of their contracts with specialist library suppliers, and restrictions on credit card use within their institutions. More generally, the change in behaviours and expectations wrought by Amazon means that all the other intermediaries in the supply chain must, if they are to remain viable, focus relentlessly on rapid (more-or-less immediate) responses to consumer demands.

158. The implications for major 'bricks and mortar' bookselling chains like Blackwell's, John Smith, and Waterstones in the UK, and Barnes & Noble in the USA, as well as for independent booksellers, have been profound; and it is widely acknowledged that the campus or high street academic bookshop model is under pressure. In the UK, membership of the Booksellers' Association Academic Booksellers' Group is declining, with a number of recent closures; and the number of independent bookshops has fallen to below a thousand (The Guardian, 2015). It should be noted, however, that in the US, the number has risen, from 1,651 in 2009 to 2,311 in 2016 (Statista, 2016). But whatever the number of bookshops, it is notable that many of them, including Waterstones in the UK and Barnes & Noble in the US, have significantly reduced the range of academic books they stock, with obvious consequences for title visibility and physical exposure. The majority of campus bookshops no longer fulfil the function of providing opportunities for academics to browse a wide range of monographs, and to reach a decision on whether or not to purchase. Their role as 'merchants of culture' (Thompson, 2010) has thus been diminished. They focus instead on meeting the demands of students (mainly undergraduates) with marked patterns of seasonal demand for textbooks and a wide range of stationery and other supplies of varying kinds. For one bookseller in the UK, John Smith, this has involved restructuring the business to focus, as Peter Lake, the Business Development Director put it, on the supply of course

texts, other learning resources, and a range of related services direct to universities as well as to students, rather than on supply services for publishers. On the other hand, one of the great fears of both online and campus booksellers is that they could be disintermediated by universities purchasing books direct from publishers; such moves have been blamed for some recent closures of campus shops.

4.9 Conclusions

159. The supply chain for academic books operates in an environment which is in many respects the mirror image of that for scholarly journals: tens of thousands of unique titles in frontlists and backlists; complex and non-compatible metadata standards; the absence of repeat orders; retail distribution and sales as important as institutional sales; low volumes of sales for the vast majority of individual titles; and the continuing dominance of physical print alongside a wide range of digital formats. For all these reasons, the array of intermediaries involved in the supply chain, the functions they fulfil, and the relationships between them remain wide-ranging and complex. Whether the current layers of complexity can be simplified is the subject of much debate. Some changes are already evident, with greater consolidation among intermediaries as larger organisations swallow up smaller ones, and as larger publishers seek—with varying success—to develop more direct sales to consumers as well as to libraries. Moreover, publishers as well as retail booksellers and other intermediaries have had to respond in a variety of ways to the threats and the opportunities created by the overwhelming growth of Amazon.

160. Nevertheless, some publishers and other commentators argue that the existing structures need to be dismantled and reconstructed from the bottom up to fit better with current circumstances, let alone to deal with future developments for ‘books’ and for ‘publishing’

(Pinter, 2015). The demand from all players in the chain—from publishers, to libraries, and booksellers—is for greater efficiency and cost-effectiveness through improvements in interoperability and data exchange, reductions in stock holding and increased use of print-on-demand for physical books, and improved support services for digital content. They also want workflows that are simple, flexible and accessible, and yet at the same time able to reap the rewards presented by new technologies and publishing formats: a supply chain that functions more transparently as a value chain from the perspectives of the range of end-users. The multiplicity of titles, publishers, and intermediaries, and the tensions between them, makes that a difficult challenge, particularly since for some of the dominant players (notably Amazon), academic books and their requirements are but a small part of their businesses. We consider these issues further in Section 9.

5. Physical print and e-books

5.1 Introduction

162. Digital technologies have had a profound impact on academic book publishing over the last two decades, most notably in transforming the economics of producing and distributing specialist titles in small numbers. The development of digital printing and print-on-demand, along with e-commerce and sales via the web, has enabled publishers to produce print copies of titles in tens and twenties, and to sell them to scholars via Amazon and similar services. They have thus underpinned the growth—at least in the UK—in numbers of new titles published each year. But they have also enabled publishers to revive their backlists, and to achieve substantial sales from them. As one commentator has put it, "this digital revalorisation of print helped to 'save the monograph' even as unit sales of new releases continued to decline" (Fisher 2015a); for American university presses, backlists can account for around two-thirds of all sales revenues (AAUP, 2017), driven by sales both to individuals (especially via Amazon) and to libraries.

163. The impact of e-books is rather more difficult to assess. Publishers and academic project teams have produced and distributed e-books—initially as CD-ROMs—from the early 1990s, with a range of formats, interfaces, markup languages, platforms, and operating systems. The emergence of the web with its potential for connectivity between different kinds of resources highlighted the need for standardization, but high prices for content and for hardware, along with poor reader experiences, meant that e-books had relatively little impact until well into the current century. Since the introduction of Amazon's Kindle from 2008, along with related software for use on laptops and mobile devices, however, both sales and readings of e-books have grown rapidly. Crossick (2015) noted this rise, alongside the continuing attractions of physical print books;

but he argued that any advantage for print over e-books "will inevitably reduce over the next decade as high-speed internet access gets closer to becoming universal in the UK and as e-readers become more reader-friendly". And Frances Pinter has argued that any thinking about academic books for the future must "first rip off the physical covers of the book and move swiftly into the digital realm" (Pinter 2016). Experience over recent years, however, suggests that for academic titles in particular, e-books are not likely to supplant physical print for some time to come.

5.2 Authors and readers

164. The majority of both authors and readers in the arts and humanities still conceive of books as physical objects. The progress made over recent years in 'digital humanities' and in hugely expanding access to scholarly resources in digital form should not obscure the fact that the great majority of researchers in the arts and humanities still conduct their research in single scholar and traditional mode: for most researchers, digital technologies have not transformed concepts about the nature and processes of research, or of how they present the results of their research. Rather, digital technologies are being used in the main to address traditional kinds of research questions, and to facilitate the production of traditional kinds of output.

165. The materiality of books with their fixed layout thus remains powerful. Most authors still welcome the influence they have over the visual presentation and layout of their work, and therefore over how the content is perceived by readers; they want to hold books, to show them to their colleagues, and to see them on library shelves. And as we have noted at various points in this report, for academic as for other kinds of books, the readability and affordances of print mean that large numbers of readers prefer print to digital formats (Perrin, 2016; Wolff et al, 2016). For the present, different groups of

readers have a range of choices as to the formats in which they read books: hardback, paperback, and a variety of digital formats, though for how long such choices will remain is not clear. It is becoming clearer that any further substantial shift to e-books will have to take account of the strengths of physical print, and the reasons for its popularity with readers.

166. For all these reasons, many commentators are thus much less confident than they were even three or four years ago about the speed with which digital will 'take over' from print books: as Dan Franklin of the digital publishing team at Penguin points out "that's testament to what a formidable piece of technology print books are" (Franklin, 2015). It is possible, of course, that a new technology will arrive to overturn the current preference for print. Whether the use of conductive inks and capacitive touch surfaces to link physical books to the web via the internet of things will perform that function is not yet clear.

5.3 Print and e-books: benefits and limitations

167. The formidable advantages of print books—especially for the complex structures typical of academic titles with their tables of contents, sections, chapters, indexes, figures, and tables, illustrations, notes and references, and so on—are well-recognised in the academic community. But they are accompanied by a number of limitations, which e-books have the potential to overcome. Full realisation of such potential is still some way off, however, not least because both most authors and editors (including copy editors and typesetters) have relatively little experience in enriching their texts to take advantage of the opportunities opened up by digital technologies. Most academic e-books are therefore produced as digital versions of what remains conceived of as a physical printed book, even though with their complex structures they do not render especially easily for readers on small screens. As Andrew Prescott

has said (Prescott, 2015), “e-book publications are the crudest of html implementations”; and many have made similar comments about journal articles. Yet PDF, the format which replicates the printed page, remains preferred by readers above the HTML format designed for computer screens.

168. Even so, e-books are popular with librarians because they can help to overcome some of the constraints on access associated with print books (see Section 5.4 below); and readers can benefit from in-text searching as against the manual use of printed tables of contents and indexes that can be highly variable in comprehensiveness and quality. E-books can more easily be tailored than print to meet the needs of those with visual and other disabilities; and more generally, they can also bring benefits in portability, being accessible anywhere via laptops, phones, tablets, and e-readers, though more needs to be done to ensure that all e-books do indeed render accessibly across the full range of devices and platforms. On the negative side, there are also some concerns that the easy availability of individual chapters or sections of books might begin to dissolve the distinction between monographs and journal articles: if most users read only discrete sections of a book, authors may have to re-think their attitudes towards when, how and why they need to create long-form narratives, structures, and arguments.

169. But e-books could provide many more benefits than is usually the case at present for both authors and readers, especially the ability to provide hypertext links to external sources—like those that readers are accustomed to using in a wide range of web-based and other resources—as well as to cross-references within the book itself. Such features, though relatively rare at present, can greatly enrich the content in e-books as compared with print. There is also the potential, with the help of semantic tagging, to facilitate detailed searching, textual analytics, and text mining, so that both readers and machines can more easily navigate, understand, and interpret the

text, though again such features are as yet far from common. If they were to become more widely available, literature and reference searches, and the construction of bibliographies and reading lists, would become much speedier and more comprehensive in their results.

170. Many commentators, along with scholars in the digital humanities, however, would like to see e-books and digital scholarship go much further, and transform them into something qualitatively different, released from the constraints of physical print. In her separate report, Marilyn Deegan (ABoF Report 2017) discusses a number of examples of 'enhanced e-books' presented in multimedia fashion, with text interwoven with images, video, and audio; and with interactive databases, graphs, and other features, along with associated apps, which thus become an integral part of academic books.

171. In a number of different ways, such examples from across the arts and humanities seek to exploit digital tools and technologies to present information and knowledge in new ways, as in the AHRC's Digital Transformations programme. By overcoming the constraints of print, they can be of particular value in the practice-based areas of the creative and performing arts. They can also bring clear advantages for scholarly editions of texts, where variorum editions can be presented using hypertext and with images of the various manuscripts alongside transcriptions and other apparatus. And since such editions rarely represent the final word on texts and their interpretation, they highlight another advantage of digital formats: the ease with which new material can be added and minor amendments made (though as Deegan notes, some scholars still express a preference for scholarly editions in print, while others have expressed concerns about the mutability of the scholarly record when in digital form it can be changed so easily).

172. But across all disciplines, groups of researchers are recording and presenting their research findings in innovative ways that are beginning to dissolve the distinctions between books on the one hand and datasets, archives, and performances on the other. And some individual authors and teams are going so far as to encourage communities of scholars to make online comments and suggestions, or even direct amendments to the text, so that the book becomes a living—and transmutable—object, and a focus for the scholarly sharing of evidence, insights, and interpretations. Such initiatives are designed to stimulate new forms of engagement between researchers and readers, and thereby to make for better scholarship, and new and better forms of scholarly communication. There is undoubted potential for further experimentation and development of such initiatives; although some of them have already had significant impacts within their disciplines and sometimes beyond, they have some way to go before they transform practice more generally within their disciplines, or among publishers. And in many disciplines, such as musicology (Lewis, 2016), there is clearly a need for further development of specialist software, metadata concepts, and ontologies. But already, as Deegan discusses, the more innovative initiatives are raising challenges for publishers, libraries, and other agents in the supply chain, and in areas such as access, curation, stability of references, and preservation. And there are major questions as to whether current modes of production are scalable or affordable for more than a small number of long-form products.

5.4 E-books and libraries

173. Perhaps the single most important advantage for e-books at present is that they can be used as a mechanism to release libraries and their users from the constraints surrounding access to a finite number of copies (often one copy) of a printed book. From the library's perspective, they also avoid the costs and limitations involved in

providing shelf space. We thus note in Sections 3 and 9 how academic libraries have rapidly developed a preference for e-books and the benefits they bring. Librarians have for long noted that significant proportions of the physical books they purchased and which took up valuable space on their shelves were never used. The large packages of e-books available at relatively low unit cost from both publishers and aggregators mean that libraries can acquire many more titles—frontlist and backlist—than they would have been able to acquire in print; hence libraries are more able to meet their users' expectations for immediate access to a vast range of titles not only in the library building but wherever their users happen to be. The contents of e-books can more readily be included in course packs, including notes, comments, and links from teachers and others; and so long as the licences they acquire allow for multiple users, libraries' need for several copies of high-demand titles is diminished. Thus, for libraries, there can be many advantages arising from e-books, even though there are some balancing disadvantages—in terms of overall costs and of the choices available to them and their users—similar to those they encounter through the Big Deal for journals. The various acquisition models for e-books have enabled libraries more readily to tailor their acquisitions to faculty and student needs; and the evidence shows that and when titles are made available as e-books, usage tends to be high, even when users express a preference for print (as one librarian put it "access trumps usability" (Karatas et al, 2015)). Moreover, usage can be monitored in ways impossible with physical print books, though both libraries and publishers are as yet in the early stages of developing and using data analytics to identify and evaluate different patterns of usage, their impact, and implications.

174. Nevertheless, as we discuss in Sections 3 and 6, libraries have to address a number of issues when deciding to acquire and provide access to e-books, including the varying but also overlapping

collections of titles provided in different packages from publishers and aggregators; the bewildering and rapidly-changing variety of acquisition models, prices, and licences; and the varying range of features on the platforms through which access to the e-books is provided. Moreover, it remains the case that there are significant gaps in the titles—particularly from backlists—that are currently available at all as e-books, or on terms that libraries find acceptable.

5.5 E-books and publishers

175. All except some of the smallest publishers now publish most if not all of their academic books in both physical and digital form either simultaneously or with a short delay before publishing the e-book; and in those cases where they are not doing so, it is mainly because of issues to do with clearance of rights for third party material such as illustrations. Almost all the publishers we spoke to assume that, in order to serve the wishes of their authors and readers, they will continue to publish titles in both formats for the foreseeable future. Hence, they must continue to invest in developing and sustaining their digital systems and platforms, or to contract with others to provide such services to them. But at the same time, they—as well as the intermediaries on whom they rely to get books to purchasers and readers—also incur the continuing additional costs involved in running parallel production and distribution systems for print and digital. That dual cost base in turn implies that prices for retail and library purchasers of both print and e-books continue to be higher than they might otherwise be.

176. The larger publishers are seeking to develop more efficient workflows based on XML files from which both physical and digital books can be produced in a variety of formats and made accessible via a number of platforms and devices. The Document Type Definitions (DTDs) used by medium or large-scale publishers to define the structure and attributes of XML documents for books to be

produced for different disciplines and different markets have to be flexible to meet the differing needs, which change over time. The DTDs for books are thus significantly more complex than for journals, and so are the workflows, with higher costs. There are also complex decisions to make as to the point at which the content submitted by authors is turned into XML files and by whom, with knock-on implications throughout the publishing organisation. And as Deegan discusses, the workflows must also encompass the long-term preservation of the digital files.

177. Publishers differ in their attitudes towards 'enhanced' e-books. Although most of the larger publishers are moving towards providing some internal clickable links in their e-books, none of them is at present seeing any significant demand for books equipped with a wide array of external links, multimedia, and interactive features for readers. Nevertheless, there is widespread recognition of the absurdity of turning the digital texts provided to them by authors into something that does not exploit the potential for such features; and there is a good deal of experimentation among publishers, along with a minority of authors who come in the main from the digital humanities community.

178. Barriers from publishers' perspectives against wider adoption of books with enhanced digital features include slow download speeds for the large files that are created; problems with preferred formats and how multimedia and other material renders on a range of devices and platforms; whether additional software will be required for readers; navigating around rights and liabilities issues when they incorporate external material into the content they publish; the new skills and competences required from authors and editors if they are to produce fully-integrated multimedia content rather than text-plus-something-else; and (perhaps as a result of the consequent deficiencies in the content produced so far) low levels of interest so far from readers. Workflows for fully-integrated multimedia and

interactive content will also pose many challenges including the length of the production process, who takes responsibility for the creation and incorporation of the material, and not least cost. None of the problems is insurmountable, but they are impediments to a publishers' ability to invest at present in interactive and multimedia books on any scale; one-off examples with bespoke processes are not scalable, nor is it clear whether shared platforms and/or tools for publishers such as the Manifold Scholarship tool whose development has been funded by Mellon (Enis, 2015) will achieve significant take-up. Successes to date with textbooks have arisen in the main from physical and e-books delivered as a single package along with multimedia material, and often created collaboratively—and with considerable amounts of voluntary effort—by teams of staff and students. How far this is scalable—and/or replicable—for monographs is uncertain.

179. Such issues are the more concerning for academic book publishers since one of their key worries (unlike journal publishers) is how to make digital publishing pay its way even in its current restricted form. At present, revenues from e-books typically represent at best 20-30% of total sales revenues for academic books (Fisher et al, 2016; Shullaw, 2016), and the rate of increase is relatively slow (Morris-Babb, 2016). Moreover, book publishers operate on margins very much smaller than their journal publishing counterparts, in large part because marketing, sales, and distribution costs are very much larger for academic books than for journals.

180. Nevertheless, we have already noted the relatively-recent popularity among librarians of the relatively unsophisticated e-books that predominate at present; and the evidence of high levels of usage—despite the professed preference for print—among library users. Unfortunately, publishers have at best partial information about sales of e-books to libraries, and we lack robust and comprehensive data on patterns and trends in usage of individual titles or groups of

titles—particularly for UK-based publishers most of whose unit sales are in export markets. Moreover, for the data that is available, there is much to do in developing analytics to make sense of them.

181. But whatever the levels and patterns of usage of e-books, publishers still base their decision-making, their marketing, and their revenue forecasts for academic books primarily around the print version, whether hardback or paperback. In so doing, they are reflecting the stated preferences of the authors and readers they seek to serve. But there is at least the potential for tension between the needs of the relatively small numbers of individuals and libraries that might wish to purchase a physical print copy, and those of the perhaps much larger numbers of readers who will gain access to an e-book version via a library. Put bluntly, the evidence suggests that there is a growing risk that publishers' policies and practices are requiring a relatively small number of print purchasers to subsidise a larger number of e-book readers. As e-book reading becomes more prevalent, it is questionable whether this is sustainable.

5.6 Conclusion

182. It is arguable that the major impact of digital technologies for academic books over the past two decades has been to transform the economics of producing and distributing printed copies of specialist titles in small numbers. The balance of advantages and limitations between print and e-books remains for the present weighted in favour of print. A majority of both academics and students prefer print when offered the choice. Hence, there is widespread agreement that academic books will continue to be produced in physical print formats for the foreseeable future; and that e-books will continue as a supplement to, not a replacement for, print. This *supplementary* value is reflected in the ways in which most academic e-books essentially seek at present to replicate on screen the formats of print

on the page; the full potential benefits of digital formats are being exploited at present only on a very small scale.

183. Nevertheless, evidence suggests that—at least for some specialist titles—readership of e-books in libraries may significantly exceed all readership of print. This may in time call increasingly into question the case for publishing such books in both formats, and incurring the additional costs involved. Rather, digital might become the default format—costed and priced as such—for academic books with limited and highly-specialist audiences. The additional costs of print—fulfilled via print-on-demand—would then be explicitly charged as an extra cost to purchasers who wanted the title in that format. Only those titles judged to have potential for a wider sale in print would be published simultaneously in both formats. In this way, as suggested elsewhere in this report, the current undifferentiated package of services provided by publishers to authors and readers might be changed so that individual packages of services could fit better to the specific circumstances of particular titles.

6. Publishing processes

6.1 Introduction

185. We have stressed at a number of points in this report that 'publishing' encompasses a number of activities designed to maximise so far as possible a book's impact and sales. Business processes for publishers, like all other organisations, have changed dramatically as a result of the digital revolution, although for reasons we discuss in this section, the impact has not been so profound for books as has been for journal publishing. There is scope, and need, for more change.

6.2 Publishing workflows

186. Most publishers, excepting some of the smallest, depend on sophisticated software packages for word-processing and design; title management; creation and management of contracts, rights, and royalties; content management, aggregation, and conversion; production management; workflow management and routing; digital asset management and distribution; search optimisation and so on. Tools of this kind may be built in-house, purchased from third parties, or licensed; and some services may be outsourced. Their adoption has had a major impact on key elements of the workflows in the publishing process: commissioning and acquisition, including seeking, developing, reviewing, and assessing proposals, and deciding on what to publish and in what format; contracts and agreements, including rights, permissions, payments, and royalties, for content published in both print and digital forms; editorial development, again for content to be published in a variety of formats; production and operations, covering the work of both staff and freelancers in creating both print and e-books; and marketing, sales, and distribution. Automation and standardisation of systems and workflows bring greater efficiency and cost-savings, minimise the scope for errors, and facilitate speedier publishing. But as we

shall see, commissioning and acquisitions have been the least affected by these developments.

6.3 Commissioning and commissioning editors

187. The success of any publishing house depends critically on the abilities of their editors in forming strong relationships with a range of authors in their subject area, building compelling lists of new proposals, and developing them into successful books. Editors act as intermediaries between academics and the publishing industry, with trust being a key element in the relationship. In a study for this project, Katharine Reeve (2015) termed them the 'creative powerhouses' and 'lynchpins' of academic publishing. They need creative flair in order to attract and inspire new authors, to create new ideas for commissioning, and to bring those ideas and the proposals they receive to fruition as successful books. But there are concerns that "the editorial role has become more title management than text and author shepherding" (Guthrie, 2011); and Reeve points to a number of variations and changes in their roles, responsibilities, and powers across a range of publishers in recent years. Reeve also suggests that editors tend to believe that they have been less affected by developments of the kind outlined above than their colleagues in design, production, marketing, and sales; a view that is confirmed by our further discussions with publishers. Although editors need, in order to manage a proposal successfully through the publishing process, to work effectively not only with authors but with a wide range of sales, marketing, and production staff, they tend to be at one remove from the latest developments in workflows that affect those other parts of the publishing business more directly.

188. Most publishers report that the titles they publish derive from a mix of unsolicited proposals and active commissioning by editors; and the distinction between the two is in fact blurred. The investment of time involved means that commissioning (acquisition in the US) is

the single most expensive of the core publishing activities (Maron et al, 2016). For a key part of the role of editors is to build a broad understanding of their field and of the scholars working in it—the lively younger ones as well as those who are more established—by visiting departments and attending conferences as well as reading the latest books and papers. Informal conversations can often lead to the submission of a proposal. But editors must also have the ability to spot interesting new approaches and areas of research, connections, and gaps in the literature; to seek out and work with potential authors as well as their sales and marketing colleagues to develop new ideas for titles; and to use their knowledge and understanding of the field to judge the quality of the proposals they receive, helping authors improve those that have potential. Reeve stresses that a compound of these attributes, combining experience with intellectual creativity and marketing nous, is essential to the development and curation of high-quality lists of titles which represent the range and diversity of authors and approaches within the subject area (see also Thompson, 2012).

189. Judgements about quality are central to the commissioning process, and the quality filtering provided by publishers is a core part of the value they provide to the academic community and wider audiences. This is particularly the case, of course, for university presses, where senior staff have remarked that ensuring that the press does not publish poor-quality books is central to their work.

190. As with journal articles, book proposals may be rejected by in-house editors or academic series editors at an early stage. But editors typically send proposals that meet the publisher's submission criteria for an external assessment by peer reviewers as well as by series editors (where such exist). Selecting and consulting peer reviewers, and weighing up their combined feedback, are key parts of editors' work; again, they act as intermediaries to manage the process, to interpret the results, and to provide constructive

feedback to authors. Where this is done well, the resulting dialogue between editors and authors can help to transform an originally-unpromising proposal, which can be particularly valuable for early career researchers.

191. Where it is *not* done well, however, the experience can be bruising for authors, and it is notable that book publishing has not seen the kind of experimentation in peer review methods that has been characteristic in journal publishing in recent years (Jubb, 2016); rather, as one respondent noted, it "has remained virtually unchanged for decades" (Reeve, 2016). And it is notable that in a study of peer review in practice undertaken for this project, Claire Squires and her colleagues at Stirling found in the literature very little discussion about peer review for books as distinct from journals. Such evidence as there is suggests that traditional peer review for books suffers from some of the same limitations as those often complained of in journals, with a small pool of reviewers providing a restricted range of perspectives (Bourke-Waite, 2015). There have been experiments in different kinds of semi-open peer review in the digital humanities community, most notably the pilot with Kathleen Fitzpatrick's *Planned Obsolescence* (2011); and some books from that community now provide facilities for post-publication comments and amendments (Gold, 2012). But the small-scale experiment in open crowd-sourced peer review conducted by Palgrave in 2014 indicated that it was difficult to generate open comments; and despite some positive responses from authors and reviewers (Newton et al, 2014), the experiment has not been followed up elsewhere. Many publishers have stressed to us their awareness that peer review is an imperfect mechanism in practice, and hence their reliance on the judgements made in the end by editors.

192. The end result of editors' commissioning work—however it is done—should be the preparation of a submission to a decision-

making publishing meeting, including a rationale with market information, competition and comparative sales data; projected costs and revenues; and the author's synopsis, contents list, and a sample chapter (Hall, 2013). In university presses, the decision-making usually involves an editorial board made up of senior faculty, with significant powers of potential veto. The submission is reviewed by sales, marketing, and other staff, and if it is approved, a contract will be prepared for the author.

6.3.1 Editorial development

193. Levels of engagement between editors and authors as they write their books vary hugely, according to individual circumstance on both sides. In some cases, editors work closely with authors over an extended period in order to get books into shape, helping with changes in structure or to ensure that the text is accessible to as wide an audience as possible. This is more common among university presses (especially in the US) and those trade publishers where editors tend to have smaller lists, and where a creative collaboration can transform a text. For it is frequently the case that texts produced by specialist academics are not readily comprehensible by non-specialists; and skilled editors knowledgeable in the subject can mediate between the scholar and potential non-specialist readers to help produce a book with appeal beyond a narrow band of specialist scholars.

194. Survey evidence suggests that many researchers value such support (Collins et al, 2016); but some see it as an incursion on their own role. And among academic publishers with longer lists—and lower sales per title—such hands-on engagement between editors and authors is less common than it was two decades ago. Editors and their managers in the commercial sector in particular are under pressure to commission more books, and thus have less time to devote to each title. Some editors keep regular contact with authors,

seeking progress reports and providing feedback on drafts. More commonly, it is left to editorial assistants to keep contact, with the commissioning editor engaging only when the manuscript is due, or is delivered. Checks will then be done of length, readability, images, and rights clearance; and the text will be sent to reviewers once more for final approval (which may also involve a supervising editorial committee).

6.4 Change and innovation?

195. The common view among editors and their managers is that how they perform their role has changed much less in recent years than those of others involved in publishing; nor do many of them see fundamental change as likely in the next few years. It is widely accepted that editors have to be more proactive than many were in the past. Particularly at commissioning stage, editors help to shape what authors propose to write, in response to market requirements and the need to focus more closely on end-user needs. But there has also been some erosion of individual editors' decision-making power—not least because of reduced sales per title: commissioning decisions now tend to be more collaborative, involving sales, marketing, and other editorial staff. Hence, some think that in the future, editors will have to become more involved in different forms of scholarly communication, thinking in terms of content rather than products.

196. But there is also a widespread view that many editors are too little engaged with digital technologies, or using their subject knowledge and expertise to experiment with new publication formats. Thus Katharine Reeve's study suggests that while some editors relish the challenge of harnessing the functionality and community-building benefits of digital technology, others are more negative, based in some cases on their experiences in experiments that have failed. There are thus some risks that as members of the scholarly

community engage increasingly with new technologies, editors (and publishers) will have only limited capacity to meet their expectations for innovative formats; and that opportunities for the development of new kinds of books will therefore be missed. For while many editors are aware of exciting new possibilities, many also lack the skills or confidence to engage fully in the detailed development of new ideas, which is left instead to design, production, and marketing staff and to external consultants. Some publishers therefore spoke to us about the need to build more teams where subject knowledge and digital expertise are embedded together, as they have been, for example, in OUP's major online reference works, scholarly editions, and monograph platform. But current low levels of demand for innovative digital books means that they are typically handled as one-offs, and often present a host of practical as well as financial problems to publishers. And in the meantime, many publishers are uncomfortably aware that authors are at least as likely to react negatively to services that used to be provided, but are no longer, as to complain about publishers' inability to handle their work in innovative ways.

6.5 Production

197. Once a manuscript has been approved, it is passed to the production department for copy-editing, design, typesetting, proof-reading, printing, and all the other tasks necessary to turn an accepted manuscript into a book in its various forms, and to make it ready for distribution (including the preparation and circulation of metadata: see Section 9.6). Production editors usually contract freelancers for many of these tasks; and again there are significant variations in practice. Many university presses in particular attach considerable importance to copy-editing, for example, using freelancers with specialist subject knowledge who liaise directly with authors chapter by chapter, checking for factual errors and seeking to ensure that references are accurate and complete. But some publishers see copy-

editing as an area where costs can be reduced; and survey evidence from the Society for Editors and Proof-readers suggests that budget reductions have led to a decline in standards, and risk undermining the reputation and value proposition of some academic publishers (Baverstock et al, 2015).

198. Text designers and typesetters are engaged to work on the copy-edited text, positioning figures and tables, and to format text into book pages; and cover designers to produce an appropriate and attractive cover. Proof-readers (again usually freelancers) then commonly read the text blind, checking for consistency, with headings fitting the contents page and so on. Any significant issues are raised either with the production editor or the copy-editor. If the author does not produce an index, a freelance indexer will also be hired. Finally, printers are engaged to produce physical copies of the book, and digital versions are in most cases produced—either simultaneously or at some stage after the print edition is released—and made available on a variety of platforms.

199. In an environment where both print and digital versions of titles remain important, there is widespread agreement that one of the keys to cost-effective production is the use of digital workflows and XML tools. They make for better, cheaper, and faster processes, and facilitate the production of multiple versions in both print and digital formats, with easier conversion and aggregation. But book publishers—for whom the variety as well as the length of content is greater than for journals—face many challenges in adopting such tools, which have wide impacts across the whole organisation (Williams, 2016). Thus many publishers have not yet made the leap.

6.6 Marketing, distribution, and sales

200. Publishers' marketing efforts focus overwhelmingly on their frontlists of forthcoming and recent publications; and as noted in Section 9.2, publishers now receive less marketing support than in

the past from distributors, booksellers, and other intermediaries. Key marketing decisions surround three issues.

201. First, pricing is a key decision, along with the discounts against the stated retail price (as recorded on the jacket or the back cover) to be negotiated with the various intermediaries, including booksellers and libraries. Pricing strategies vary, with some publishers adopting models based on page length for each title, while many others use different criteria. Many publishers believe strongly that the demand for books is not price-sensitive, but some of our interviewees suggest they are aware of resistance to high prices at least in some European markets.

202. Second, publishers have various strategies for engagement with the key intermediaries and customers, through regular meetings, attendance at book fairs, academic conferences, and so on. Engagement of this kind may also involve efforts to develop new export markets, particularly in Asia and the developing world, either through the sale of translation and other rights or through direct sales. But whether in domestic or overseas markets, sales monitoring routines (especially for key titles) are essential. Some publishers are seeking to enhance their capacity in data analytics relating to sales, but smaller publishers have to rely on third parties to provide such services.

203. Third, they engage in active marketing via catalogues, their websites, direct marketing, the use of social media, engagement with authors, and so on. Ensuring that books are easily discoverable is an essential part of such efforts. Many publishers are aware that they must do more in this area, since readers' expectations are increasingly set by Google, Amazon, Apple, and Facebook. But publishers are as yet only at the early stages of working with authors and others to create, curate, and make accessible the metadata and in developing the kinds of user-friendly search and browse facilities on their own

websites that are essential to improving discoverability for both physical and online books in the online world (see Section 9.6). Publishers are also strongly aware that all aspects of marketing for academic books are significantly different than for trade books, and that close understanding of relevant academic and also library communities—their behaviours and needs—is key to success. Publishers typically ask authors to complete—with more or less enthusiasm and success—a marketing questionnaire to help them target their efforts. There is some evidence that targeted and carefully managed social media efforts have some effect in increasing sales and impact. These efforts range from webinars, blogs, and the use of social platforms on publishers' sites to more generic sites such as Facebook, Instagram, or Twitter (the most commonly used by university presses); and can be facilitated by authors or by third party organisations such as Kudos. Efficient mechanisms for the provision of inspection copies for titles that might feature on reading lists at undergraduate and postgraduate levels are also essential. But careful review and monitoring of the balance between different marketing routes, and amending them in the light of changes in the overall scholarly communications and public policy environment, is crucial.

204. But the online environment has changed how readers discover and buy books, and publishers have responded by increasing the ways in which they build awareness and enhance discoverability across a wide range of channels. Most of them are as yet in the early stages, however, of using online environments to build a closer understanding of the behaviours and attitudes of potential purchasers and readers, and of how their books and related content are used. And although Springer has launched a Bookmetrix platform in partnership with the Altmetric company, altmetrics which seek to track online attention to scholarly outputs across a range of sources have as yet made little headway in the academic books world (Canty,

2016). Operating through multiple distribution channels while fundamentally shifting how marketing and sales work represents a key challenge for all engaged in the publishing process, including commissioning and production editors as well as marketing and sales staff. Moreover, wherever possible, marketing and sales is increasingly based on intelligence about users—potential and actual—and their behaviours.

205. Publishers also work on their backlists as well as their frontlists. They vary in the length of time for which they keep titles on their frontlists, and the criteria and arrangements for republishing titles in paperback. Hence, it is difficult to gather consistent information on the proportions of sales and revenues that derive from frontlists and backlists; but our interviewees suggest a common experience that the vast majority of sales are made within 12 months of publication. Sales and revenues from backlists depend also on the extent to which backlist titles have been digitised and made available as e-books. Some suggest that generating backlist sales is becoming increasingly difficult. Nevertheless, one of the drivers behind mergers and acquisitions has been the market advantage that larger publishers believe they can gain in digital environments by exploiting the content in larger backlists; while some publishers such as CUP are beginning to make chapters and sections from their backlist titles accessible (and findable via Google) in an attempt to generate more sales.

6.7 Conclusion

206. Some parts of the processes for publishing books have changed radically in the past decade, but the change has not been nearly as profound as in journal publishing. Many of the smaller publishers in particular, who play such an important role in monograph publishing in the arts and humanities, have yet to take full advantage of the potential of digital workflows and technologies. And the processes

involved in the core editorial functions of commissioning and then overseeing authors' labours as they produce a final text—which account for the major portion of publishers' work and their costs—have changed relatively little. Partly, no doubt, because quality assurance and control are focused on list building and commissioning, there has not been the same experimentation in peer review, for example, that has been evident in journal publishing.

207. Production and distribution processes are being transformed both by e-books and by digital printing technologies; but for many publishers there is still much work to be done in the implementation of digital workflows and XML tools. This brings with it the risk that publishers may have limited their ability to innovate, and to respond to new opportunities and expectations by developing new content formats, based on evaluation of the needs of authors and their content, but also of readers and users. There are already signs that for some publishers, commissioning decisions are now more collaborative than in the past; and some publishers are also beginning to create teams where subject knowledge and digital expertise are embedded together. Developing new kinds of publications will demand more changes of this kind. But established publishers with significant volumes of new titles are highly conscious of the need to balance innovation and caution. Nevertheless, active engagement with new technologies across all parts of the publishing process is essential if publishers are to develop new workflows designed to meet the needs of different kinds of content produced by different authors for different purposes, for which the distinct parts of the publishing process—currently aggregated in a relatively undifferentiated package—may have different requirements and different value.

7. Legal and Contractual Issues

7.1 Introduction

209. For the publishers of academic books, like any other publishers, the creation, acquisition and management of intellectual property rights—pre-eminently in the form of copyright—are at the heart of their business. Their most valuable assets are the rights they own or control, which generate the vast bulk of their income. The rights derive from the contracts under which authors assign copyright or grant a licence to publishers to publish and sell their works. Academic books also frequently contain third party copyright in text quoted from other sources, and in images and other kinds of content. Each one of the copyright works must be the subject of an agreement allowing it to be reproduced and published, typically in the form of a licence. Dealing with intellectual property rights can thus be complex, and the digital revolution is making it more so. Moreover, while the general principles of intellectual property law across the world are set by the Berne Convention, there are significant variations in legislation and the rights and obligations of authors, publishers and other parties in different countries, even within the European Union.

210. From the publishers' perspective, since rights are at the core of their business, it is essential that they take great care over the acquisition and management of those rights: a senior manager usually has overall responsibility for rights management and the policies surrounding it. The risks otherwise are loss of income, piracy, and inability to make use of content in new ways, but also inadvertent infringement of others' rights, legal challenges, and severe reputational damage (Faulder et al, 2016). In order to avoid such risks, publishers must consider carefully when they acquire rights how they might wish to use the content in the future, how they manage reversions of rights that have been granted for a limited

time, how they monitor and manage compliance, and their policies on permissions and licensing. Comprehensive documentation and effective record keeping, and regular audit of the records, are fundamental to all these activities.

7.2 Authors and publishers

211. Publishing rests on the contracts between authors and publishers. Contracts are made on the basis of various permutations of a synopsis and/or sample chapters, or (as is quite common with first books, derived from doctoral theses) complete typescripts. It is critically important for both parties that the contract specifies closely the content of the commissioned work, the delivery date, the form in which the content should be presented to the publisher, as well as the forms in which publication is to take place. The contract must also specify the grounds on which a manuscript will be treated as acceptable or not, and the arrangements for making amendments. Publishers typically also require authors to provide warranties that they are the original creators of the work, that they are not committed to another publisher, that third party material is not to be included without permission, and often that the work would not render the publisher liable to risks or penalties through negligent inaccuracies or other cause (WIPO, nd).

212. Once a work is accepted, authors grant to publishers the rights of reproduction and distribution that they have acquired as creators under relevant copyright legislation (in the UK, the Copyright, Designs and Patents Act 1988 as subsequently amended). The grant takes one of two main forms.

213. First, the author may grant an exclusive licence to publish, so that copyright remains with the author (and in some countries licensing is the only form of contract allowed). The default is that licences cover the right to publish in the original language and in the country in which the author and publisher are located; but the licence may or

may not include other rights covering issues such as translation and publishing in other countries, and in a range of formats. Contracts should also set out the circumstances in which rights revert to the author (for example when a book goes out of print) and how the reversion takes effect.

214. Second, authors may assign the copyright to publishers, so that publishers take over from them ownership of the copyright, and thus the rights (unless they are restricted in the contract) to exploit the work in any way they choose. An assignment of copyright thus offers advantages to publishers, but authors may be reluctant to cede their rights permanently in this way.

215. Contracts—either in the form of a licence or an assignment of copyright—may also cover issues relating to a range of subsidiary rights that arise through the fact of publication, such as the right of reprographic reproduction or the making of photocopies; abridgement; and serial rights. Whatever the scope of the rights covered, in exchange for the grant they receive, publishers typically either pay a fee to the author, or agree to pay royalties dependent on sales (with or without an advance). Publishers then also take on the role of monitoring and seeking to enforce rights on behalf of the author.

216. The great majority of contracts for the publication of academic books take one of the two forms and cover the kinds of issues outlined above. But academics' motivations for writing and publishing books are typically bound up with a desire to maximise the impact of their work by communicating it to as many of their peers and members of the wider public as possible, and to gain the scholarly credit for so doing. A primary concern is thus to maximise dissemination and readership; and as members of the academic staff of universities and similar institutions, many of them are less concerned than some other authors with the potential commercial returns from publishing

(Crossick, 2015; Ferwerda et al, 2013). Hence a growing number of academics have become uncomfortable with any notion of restricting the rights of readers and users; and still more with any suggestion of assigning copyright to publishers. There are in any case issues that both authors and publishers have to consider relating to the ownership of copyright for works created within the scope of academics' duties as university employees. Under copyright law, universities as employers own the copyright of such works, but while most universities in the UK claim ownership of teaching materials, only a small minority seek to assert ownership of scholarly works (British Academy and Publishers Association, 2008; Jisc, 2014; Gadd, 2017).

217. But more fundamentally, some academics wish not to enforce their economic rights as copyright owners by restricting access and use of their work in any way; rather, their key interest is in their moral rights as creators (which cannot be assigned), and in particular on the key moral right of attribution, which in the academic world is handled by convention and practice through the various mechanisms of citation. For OA publishing in particular, moral rights and related issues are covered by the range of Creative Commons licences. Indeed, when books are published OA, the *economic* rights associated with copyright, which were traditionally at the core of publishers' business, are of little consequence; for the OA business model depends on fees paid before a title is published, not on subsequent sales.

7.3 Third party rights

218. Academic books typically include text extracts, illustrations and other material from a range of published and/or unpublished sources. Unless they fall within the copyright exceptions for fair dealing or fair use (depending on the jurisdiction), they can be published only if the relevant rights owner has granted permission.

Most publishers lay on authors the responsibility for securing the necessary permissions, and provide guidance on what needs to be done (see, for example, Taylor & Francis, 2013). But many publishers have told us that more authors now want to include more third party material than in the past, and this presents challenges in the clearance of rights. And since publishers tend to be risk-averse, many of them report that they have become more involved than previously in negotiations with rights-holders, particularly on rights for digital publication; and that many authors are less aware than in the past of the issues that may arise in rights clearance. Survey evidence suggests, indeed, that many academics encounter difficulties in handling these issues (OAPEN UK, 2014; Marden, 2016). Some academics complain that many problems derive from 'narrow interpretations' of "fair dealing" exemptions—both by rights-holders and by publishers of new works which referred to existing copyright material—and also from the actions of risk-averse publishers, demanding that unnecessary permissions be obtained; such permissions might then be refused or granted on unreasonable terms (Kay, 2008; Crossick, 2015). The lack of relevant case law in the UK on what is permissible under fair dealing exceptions has exacerbated the problems, while the 'fair use' exceptions applicable in the US are generally rather wider than those applicable in the UK.

219. Academics who wish to publish scholarly works covering aspects of, for example, art history or material culture (where permissions may be needed from varying combinations of artists or designers, museums and galleries, owners of the physical work, and photographers), or music (where permissions may be needed for the composition, the score and its layout, lyrics, and for performances and recordings), or which involve extensive use of quotations from literary texts or unpublished papers, can thus face considerable problems. The process of identifying, contacting, and gathering responses from rights-holders can be lengthy, and where books

contain large quantities of third party material, the costs can be considerable. The problems associated with so-called 'orphan works' (for which rights holders cannot be found after reasonable search) have been eased—but not eliminated—in the UK by the creation of an orphan works register; its coverage is as yet meagre (Intellectual Property Office, 2016).

220. The nature and extent of the proposed usage—including the versions of the title in which the content will appear, and the countries in which it will be sold—usually determine whether or not the rights-holder charges for permission, and if so how much. Publishers may set a limit to the amount they are prepared to spend on permissions for a given title. As Crossick (2015) notes, many museums and galleries have in recent years adopted more liberal policies relating to image rights and permissions; but on the other hand, some publishers have themselves become more aware of the revenue potential of the rights they hold, and thus have become much less liberal.

221. The key point from publishers' perspective is that they must maintain accurate and comprehensive records of the permissions that have been granted, the time and geographical limits, and the precise uses allowed, so that they can deal with queries as they arise, and so that logs can be created for re-clearing each permission as the need arises (for example, for a new edition).

7.4 Copyright exceptions, licences, and libraries

222. The fair dealing/fair use exceptions covering copying of extracts for the purposes of non-commercial research and private study are of critical importance in the academic world for both authors and readers, along with the associated exceptions covering copying for the purposes of instruction, and allowing libraries to make copies for staff and students who submit a declaration that they wish to use them for non-commercial purposes. In the UK, these exceptions have

been extended slightly as a result of amendments in 2014, following the Hargreaves Review in 2011, to the Copyright, Designs and Patents Act 1988. The key changes forbid any contract to override the exceptions. There are also extensions to the exceptions relating to libraries' ability to copy for preservation and access purposes, for other libraries, and to dedicated terminals. But much of the copying that goes on in universities and their libraries is covered by licence agreements with collective reproduction rights organisations such as the Copyright Licensing Agency and related bodies in the UK, and the Copyright Clearance Center in the US. Such licences are required when, for example, extracts from books are loaded into a university's VLE.

223. A report commissioned by the World Intellectual Property Organisation (WIPO) showed that libraries and archives work under a patchwork of exceptions, limitations and other provisions that differ in scope and effect from country to country (Crews, 2008). Even in a single country such as the UK, academic libraries can face difficulties in administering licences and exceptions, the restrictions surrounding them and the relationships between them; and in advising staff and students about their obligations. Licence fees for access and use vary considerably. And for the books of the past that are so important for research in the arts and humanities, the requirements for reasonable search for rights holders means that mass digitisation projects are rendered impractical.

7.5 Digital works

224. The digital environment has brought added complexity to copyright and intellectual property for authors, publishers, libraries, and readers. It has led to a succession of reviews of legal and regulatory regimes in the UK, Europe, and across the world; for one of the key issues is that the online environment dissolves national boundaries (Hargreaves, 2011; European Union, 2013). And it has also brought a

growing expectation that content of all kinds should be available free of charge and without restriction.

225. The contracts between authors and publishers now almost invariably cover the rights associated with books in both digital and physical print form. But securing permissions to use third party content in e-books as well as the printed version may often prove difficult; for rights-holders may be concerned about the potential for much wider distribution of their content, and the risks of much easier copying. Permissions can thus be expensive, and often with short time limits. Publishers can also encounter practical difficulties when they seek permissions associated with digitising their backlists. And for new titles, there can be many complications in identifying rights-holders and securing permissions relating to text and multimedia content that is available (freely or not) via the web; and then in ensuring that permanent links to that content are available (though there is debate as to whether providing hyperlinks should be subject to the agreement of the rights-holder). Dealing with these issues will become more complex if and when 'enhanced e-books' become a more common part of the landscape; for issues will arise relating to the rights relating to the software encoded in digital content, and some content may be subject to database rights as well as copyright.

226. Online access also increases the risk of piracy and other infringements of authors and publishers' rights. Publishers whose business depends on exploiting those rights (that is, all except OA publishers) have a legitimate concern to protect them, including those of their authors. But there are widespread discussions about whether the balance of rights on the one hand and exceptions and limitations on the other is at present properly responsive as technologies and related services continue to change rapidly. There is thus debate as to whether current regimes (including licensing for e-books) deal appropriately with issues such as accessibility, usage

restrictions, preservation, interlibrary lending and document supply, legal deposit, rights-holders' use of technical protection measures, and digital rights management mechanisms that may prevent legal uses (see, for example, the International Federation of Library Associations (IFLA), 2013; and WIPO, 2017). It is not clear how the recent judgement of the Court of Justice of the European Union on e-book lending, announced in November 2016 (ECJ, 2016) will affect these issues.

7.6 Conclusion

227. Rights—their protection and exploitation—are at the core of the business for most publishers, and they must take great care over the precise rights they acquire, and how they manage them. Above all, publishing rests on the contracts between authors and publishers, under which authors either grant the publisher an exclusive licence to publish, or assign copyright to the publisher, who thus acquires the rights to exploit the work in any way. But many academic books involve the use of content owned or controlled by third party rights-holders, and acquiring the rights associated with such content can pose many difficulties and prove costly, especially for books in areas such as art history, material culture, music, and media studies. The costs and the difficulties are exacerbated in the UK by lack of relevant case law, which makes many publishers risk-averse.

228. For authors of textbooks and trade books, the royalties and other rights income they receive can make significant additions to their income. But for the majority of authors of academic monographs, the fact of publication, and the scholarly and professional rewards that flow from it, are much more important than any income from fees and royalties. Hence academics may be reluctant to transfer or assign rights, or to restrict access to their work in any way; and this can bring tensions to the relationships between authors and publishers.

Together with the advent of the web, such tensions are among the key drivers behind moves towards OA.

229. But the web and the digital environment more generally have also raised the importance of the copyright exceptions on which libraries depend for the provision of many of their services; and on which scholarly researchers rely so that they can gain access to and use the scholarly content that is essential for their work. They have also made for much greater complexity in handling the relationships between exceptions and restrictions on copyright on the one hand, and licensing and the protection of rights on the other. The reviews and debates on these issues over the last two decades have brought some progress; but the debates are far from resolved. Until they are, legal and licensing restrictions will continue to limit the scope for further progress in the development and use of e-books.

8. Demand and Sales

8.1 Introduction

230. Demand for books is not necessarily expressed in sales: for many academic books, the great majority of readers and readings come via libraries, where demand may be buoyant, and for OA books, demand is expressed almost wholly in views and downloads. Nevertheless, for books published under traditional models, sales revenues underpin the publishing process. We have referred at several points in this report to declining sales for academic books in the arts and humanities, particularly at the per-title level; increases in prices per title; constraints on library budgets for book purchasing; and reduced exposure to consumers. There is a notable absence, however, of comprehensive and robust data to facilitate a full examination of such trends.

231. In the US, data from the AAUP (2017 and 2017b) provides breakdowns of the unit sales and revenues for university presses grouped by size, and by format, front and backlist, and sales channel. As we noted in Section 2, the great majority of their sales are in the domestic market; and the data shows that overall sales revenues have fallen in cash terms since 2013, with sharp falls in print sales being only partly offset by increases for e-books. But in the rest of this section, we concentrate our attention on evidence from the UK, with a particular focus on retail sales.[2]

232. Sales figures for the UK derive mainly from two sources: the Publishers Association annual *Statistics Yearbook*, which collects sales data from its publisher members covering both their domestic and export markets; and Nielsen BookScan, which collects retail sales data from electronic point of sale (EPOS) systems from online

[2] A recent report on the monograph output of American university presses, including some data on sales, came too late to be incorporated in this report (Esposito et al, 2017)

and bricks-and-mortar booksellers across the UK, including sales of books from both UK and overseas publishers. In examining the data, it is important to emphasise a number of caveats. First, there is no clear definition or categorisation as to what constitutes an academic book, still less the monographs and related kinds of books on which we focus in this report. Second, the Book Industry Communication (BIC) subject categories used by publishers and booksellers do not map readily onto some of the subject and disciplinary classifications used in academia. Third, subjects are often aggregated in the available data. And fourth, the retail sales data from Nielsen BookScan does not cover sales to libraries, bulk institutional sales, or individual titles within custom packs, all of which are critically important parts of the market for academic books.

8.2 UK publishers' academic and professional book sales

233. With all those caveats in mind, we can set the context for UK publishers, with data arising from Publishers Association member surveys. These show that for the UK publishing industry as a whole, sales of physical books are currently rising, while digital revenues are falling. But the educational, academic and professional sectors of publishing are the exceptions to this trend: their digital revenues are continuing to rise (Publishers Association news release, 4 November 2016). Whether this is because of the influence of a continuing shift in library sales in favour of e-books is not clear.

234. Surveys of the Association's academic and professional sector members indicate that their revenues from invoiced sales of print and digital books amounted in 2015 to £1,049m, or just under a third of the total book sales of all UK publishers. Digital sales revenues accounted for 25% of the total, up from 14% in 2011. Since 2011, there has been a fall of 15% in sales revenues from print, offset by a rise of 78% in revenues from e-books; and the number of physical books sold has fallen even more sharply, by 26%. But these figures

cover academic and professional books in all subjects, not just the arts and humanities; and a large proportion of them (estimated at 80%) are textbooks (Publishers Association, 2016).

235. We have only very limited ability to deal with these limitations for our purposes in the Publishers Association data. But we can examine trends relating to books in the social sciences and humanities, where invoiced sales in 2015 amounted to £778m, a rise of 1.6% since 2011, with an 11% fall in print sales revenues offset by a 69% rise for e-books, which now account for 26% of the total. Sales are split roughly evenly between the domestic and export markets, though export sales revenues fell by 8% between 2013 and 2015. Europe accounts for two-fifths of export sales, East and South Asia for a fifth, and North America for less than a sixth (down from a fifth in 2011). What we still don't know is whether these trends apply to the relatively small proportion of the total figures that would cover monographs, edited collections, and scholarly editions.

8.3 Retail sales in the UK

236. In order to secure some indication of the effective demand for academic books in the arts and humanities, we have examined the data from Nielsen BookScan relating to retail sales in the UK. It is important to stress the limitations of this data too: it relates only to purchases of physical books transacted through EPOS in the UK, and thus excludes sales of e-books, overseas sales, and sales to libraries. And it raises in acute form the issues we have noted at several points earlier relating to the definition of academic books. In the analysis for this part of the current study, we have taken the approach of examining the sales of titles published by any university press, or under any imprint that features among the books submitted by UK authors in 2013 to the most recent Research Excellence Framework (REF) exercise, in the subject areas covered by Main Panel D (which

was responsible for most of the subject areas in the arts and humanities).

237. This approach means that the analysis covers a broader range of titles than the monographs, edited collections, and scholarly editions that are the primary focus of this report. Some of the titles covered in the analysis would undoubtedly be regarded as educational or trade rather than academic titles, for example, though in some subject areas such as history the distinction between trade and academic books is highly fluid. Indeed, titles that were published as trade books featured prominently among the titles submitted to the REF, indicating that , they were regarded by the academics concerned as among their most important recent scholarly works.

238. There are in addition issues relating to subject categorisations, which for BookScan purposes are based on BIC classifications. This means that we cannot distinguish, for instance, between academic books on literature in English as distinct from foreign languages, and that we have no data for a subject such as Area Studies. Nevertheless, despite all these caveats and limitations, the data can be useful in the least as a means of identifying trends. Finally, we should stress that data in this section on sales of books submitted to the REF relates only to those versions of books for which an ISBN is recorded in the REF data (usually but not always the hardback edition). Where paperbacks as well as hardbacks or other versions were published, the figures thus represent an underestimate of sales.

239. The analysis summarised here focuses on UK retail sales of titles in 2005 and 2014. Table 1 shows that, under the definitions outlined above, BookScan recorded 3.76m unit sales of academic books in 2014, as compared with 4.34m in 2005, a fall of 13%. More striking is that the number of individual titles sold rose by 45%, from 43k to 63k, with the result that sales per title fell sharply, from 100 to 60. Nevertheless, sales revenues (taking account of booksellers'

discounts) rose in cash terms by 5% from £51.7m to £54.1m, indicating that revenues per sale rose by 20% (though this was significantly less than the UK inflation rate of 33% over the period 2005 to 2014). There was also a sizeable shift in the balance between hardback and paperback sales: in 2005 hardbacks accounted for 22% of all sales, and 38% of revenues, but in 2014 this had risen to 31% of sales and 45% of revenues, though the pattern in different subject areas varied significantly, as we shall see.

	2005				2014				change			
	sales	titles	s/t	cash	sales	titles	s/t	cash	sales	titles	s/t	cash
Art & Design												
Paperback	834,577	4,838	173	£ 9,836,347.27	632,144	6,649	95	£ 8,848,246.85	-24%	37%	-45%	-10%
Hardback	376,197	4,246	89	£ 8,129,137.11	456,665	6,919	66	£ 10,712,636.36	21%	63%	-26%	32%
Totals	1,210,774	9,084	133	£17,965,484.38	1,088,809	13,568	80	£ 19,560,883.21	-10%	49%	-40%	9%
Music & dance												
Paperback	53,391	1,034	52	£ 702,266.00	65,845	539	122	£ 829,110.00	23%	-48%	135%	18%
Hardback	9,377	676	14	£ 262,199.00	41,980	1,224	34	£ 771,406.00	348%	81%	143%	194%
Totals	62,768	1,710	37	£ 964,465.00	107,825	1,763	61	£ 1,600,516.00	72%	3%	65%	66%
Comms & media												
Paperback	90,250	1,772	51	£ 1,126,350.96	90,268	3,225	28	£ 1,210,111.67	0%	82%	-45%	7%
Hardback	12,250	354	35	£ 191,787.98	9,461	701	13	£ 200,324.75	-23%	98%	-61%	4%
Totals	102,500	2,126	48	£ 1,318,138.94	99,729	3,926	25	£ 1,410,436.42	-3%	85%	-47%	7%
History												
Paperback	1,280,241	5,363	239	£ 11,442,200.07	1,060,036	8,142	130	£ 10,351,689.64	-17%	52%	-45%	-10%
Hardback	408,462	3,027	135	£ 7,341,915.23	528,289	5,162	102	£ 9,316,600.93	29%	71%	-24%	27%
Totals	1,688,703	8,390	201	£ 18,784,115.30	1,588,325	13,304	119	£ 19,668,290.57	-6%	59%	-41%	5%
Ancient history												
Paperback	91,978	712	129	£ 939,338.59	96,933	1,070	91	£ 1,083,758.18	5%	50%	-30%	15%
Hardback	18,113	389	47	£ 384,019.40	30,098	838	36	£ 606,682.40	66%	115%	-23%	58%
Totals	110,091	1,101	100	£ 1,323,357.99	127,031	1,908	67	£ 1,690,440.58	15%	73%	-33%	28%
Literature												
Paperback	616,837	5,471	113	£ 4,083,200.31	290,010	6,537	44	£ 3,082,801.24	-53%	19%	-61%	-25%
Hardback	77,941	2,399	32	£ 1,417,747.42	75,604	4,283	18	£ 1,570,782.29	-3%	79%	-46%	11%
Totals	694,778	7,870	88	£ 5,500,947.73	365,614	10,820	34	£ 4,653,583.53	-47%	37%	-62%	-15%
Philosophy												
Paperback	136,580	3,802	36	£ 1,916,604.52	102,531	3,643	28	£ 1,510,632.36	-25%	-4%	-22%	-21%
Hardback	16,259	1,144	14	£ 282,519.12	16,937	1,759	10	£ 377,172.27	4%	54%	-32%	34%
Totals	152,839	4,946	31	£ 2,199,123.64	119,468	5,402	22	£ 1,887,804.63	-22%	9%	-28%	-14%
Religion & theology												
Paperback	196,078	4,858	40	£ 2,000,258.38	205,338	6,790	30	£ 2,275,183.36	5%	40%	-25%	14%
Hardback	20,382	1,285	16	£ 379,057.85	23,233	2,451	9	£ 520,605.30	14%	91%	-40%	37%
Totals	216,460	6,143	35	£ 2,379,316.23	228,571	9,241	25	£ 2,795,788.66	6%	50%	-30%	18%
Linguistics												
Paperback	80,108	1,414	57	£ 1,051,948.60	35,419	2,240	16	£ 707,912.70	-56%	58%	-72%	-33%
Hardback	16,572	506	33	£ 231,328.19	3,299	753	4	£ 104,605.23	-80%	49%	-87%	-55%
Totals	96,680	1,920	50	£ 1,283,276.79	38,718	2,993	13	£ 812,517.93	-60%	56%	-74%	-37%
Totals												
Paperback	3,380,040	29,264	116	£ 33,098,514.70	2,578,524	38,835	66	£ 29,899,446.00	-24%	33%	-43%	-10%
Hardback	955,553	14,026	68	£ 18,619,711.30	1,185,566	24,090	49	£ 24,180,815.53	24%	72%	-28%	30%
Totals	4,335,593	43,290	100	£ 51,718,226.00	3,764,090	62,925	60	£ 54,080,261.53	-13%	45%	-40%	5%

Table 1: UK Retail sales of academic books in 2005 and 2014. Figures according to Nielsen BookScan data as described above.

8.4 Retail sales of academic books published by university presses in the UK

240. University presses accounted for 11% of sales in both 2005 and 2014 from all the publishers analysed, and their revenues for 13% of the total in both years, indicating that their average revenues per title were slightly higher than the average for all publishers. But in 2005 they represented 43% of the titles for which sales were recorded, so their sales per title were only a little over a quarter those for other publishers. Table 2 shows that while—as with other publishers—the number of titles for which they secured sales rose by 2014, it did so at a slower rate, so that university presses represented only 36% of titles. Sales fell by 14%, and revenues were static, as compared to a 5% rise in the all-publisher average; and although sales per title fell, they did so at a lower rate than the average.

	2005				2014				change			
	sales	titles	s/t	cash	sales	titles	s/t	cash	sales	titles	s/t	cash
Art & Design												
Paperback	52,471	1,415	37	£ 698,509.05	27,335	1,450	19	£ 380,430.49	-48%	2%	-49%	-46%
Hardback	31,745	1,263	25	£ 917,428.47	42,365	1,701	25	£ 1,250,555.86	33%	35%	-1%	36%
Totals	84,216	2,678	31	£ 1,615,937.52	69,700	3,151	45	£ 1,630,986.35	-17%	18%	42%	1%
Music & dance												
Paperback	21,357	685	31	£ 310,297.00	14,642	206	71	£ 195,753.00	-31%	-70%	128%	-37%
Hardback	5,966	452	13	£ 178,900.00	9,476	592	16	£ 196,308.00	59%	31%	23%	10%
Totals	27,323	1,137	24	£ 489,197.00	24,118	798	30	£ 392,061.00	-12%	-30%	25%	-20%
Comms & media												
Paperback	16,510	728	23	£ 231,145.29	11,525	1,287	9	£ 185,134.76	-30%	77%	-61%	-20%
Hardback	937	120	8	£ 17,986.13	1,738	257	7	£ 38,803.62	85%	114%	-13%	116%
Totals	17,447	848	21	£ 249,131.42	13,263	1,544	9	£ 223,938.38	-24%	82%	-58%	-10%
History												
Paperback	63,026	1,888	33	£ 725,315.97	57,309	2,130	27	£ 739,580.44	-9%	13%	-19%	2%
Hardback	30,026	1,240	24	£ 524,191.20	34,936	1,675	21	£ 808,824.72	16%	35%	-14%	54%
Totals	93,052	3,128	30	£ 1,249,507.17	92,245	3,805	24	£ 1,548,405.16	-1%	22%	-19%	24%
Ancient history												
Paperback	13,041	319	41	£ 182,425.19	14,391	533	27	£ 213,048.25	10%	67%	-34%	17%
Hardback	3,586	226	16	£ 87,266.39	8,602	440	20	£ 210,925.16	140%	95%	23%	142%
Totals	16,627	545	31	£ 269,691.58	22,993	973	24	£ 423,973.41	38%	79%	-23%	57%
Literature												
Paperback	71,260	2,624	27	£ 849,360.68	57,332	2,887	20	£ 759,318.87	-20%	10%	-27%	-11%
Hardback	12,476	1,410	9	£ 278,872.07	17,305	2,222	8	£ 410,044.27	39%	58%	-12%	47%
Totals	83,736	4,034	21	£ 1,128,232.75	74,637	5,109	15	£ 1,169,363.14	-11%	27%	-30%	4%
Philosophy												
Paperback	59,102	2,641	22	£ 901,859.32	46,116	2,088	22	£ 639,364.87	-22%	-21%	-1%	-29%
Hardback	14,083	847	17	£ 203,850.57	9,662	1,220	8	£ 232,838.40	-31%	44%	-52%	14%
Totals	73,185	3,488	21	£ 1,105,709.89	55,778	3,308	17	£ 872,203.27	-24%	-5%	-20%	-21%
Religion & theol.												
Paperback	50,343	1,391	36	£ 523,180.93	38,402	1,667	23	£ 443,230.11	-24%	20%	-36%	-15%
Hardback	6,569	614	11	£ 116,429.67	9,987	1,118	9	£ 243,980.77	52%	82%	-17%	110%
Totals	56,912	2,005	28	£ 639,610.60	48,389	2,785	17	£ 687,210.88	-15%	39%	-39%	7%
Linguistics												
Paperback	22,766	622	37	£ 348,938.35	14,405	946	15	£ 270,241.81	-37%	52%	-58%	-23%
Hardback	10,587	248	43	£ 142,362.64	1,595	262	6	£ 43,532.99	-85%	6%	-86%	-69%
Totals	33,353	870	38	£ 491,300.99	16,000	1,208	13	£ 313,774.80	-52%	39%	-65%	-36%
Total for Ups												
Paperback	369,876	12,313	30	£ 4,771,031.78	281,457	13,194	21	£ 3,826,102.60	-24%	7%	-29%	-20%
Hardback	115,975	6,420	18	£ 2,467,287.14	135,666	9,487	14	£ 3,435,813.79	17%	48%	-21%	39%
Totals	485,851	18,733	26	£ 7,238,318.92	417,123	22,681	18	£ 7,261,916.39	-14%	21%	-29%	0%

Table 2: UK Retail sales in 2005 and 2014 of academic books published by university presses

241. It is also noticeable that the subject profile of the titles sold by university presses differs from the average for all publishers. Thus, titles in art and design (including architecture, photography, and art history) and history accounted for over two-thirds of titles with sales for all publishers, and that proportion rose between 2005 and 2014. Among other subject areas only literature achieved 10% or more (and falling) of the total for all publishers; and the percentages for

subjects such as classics, philosophy, and theology were in single figures. University presses, however, show a much more even spread of both titles and sales by subject area. History, along with art and design, remain the two biggest areas, but together account for only two-fifths of sales. Literature accounted for a sixth of sales, while philosophy and theology together accounted for a quarter (the proportion for classics is artificially deflated by the inclusion of classical literature alongside the literatures of all other languages).

8.5 Sales by subject/discipline

8.5.1 Art and design

	2005				2014				change			
	sales	titles	s/t	cash	sales	titles	s/t	cash	sales	titles	s/t	cash
Art & Design												
Paperback	834,577	4,838	173	£ 9,836,347.27	632,144	6,649	95	£ 8,848,246.85	-24%	37%	-45%	-10%
Hardback	376,197	4,246	89	£ 8,129,137.11	456,665	6,919	66	£ 10,712,636.36	21%	63%	-26%	32%
Totals	1,210,774	9,084	133	£17,965,484.38	1,088,809	13,568	80	£ 19,560,883.21	-10%	49%	-40%	9%

Table 3: UK retail sales for academic books in art and design

242. Titles published in art and design cover a wide variety of subjects and forms, from the practical to the historical or theoretical, and with an often complex relationship between galleries and publishers (Nedo, 2016). Overall, the number of titles recorded with sales rose by just under 50% between 2005 and 2014, from 9k to over 13.5k. Sales fell by 10%, from just over 1.2m to 1.1m, but in cash terms revenues rose by 9%, from £18.0m to £19.6m. Sales per title fell from 133 to 80. The shift from paperback to hardback was marked: paperback sales fell by a quarter, while hardback rose by a fifth; and hardback accounted in 2014 for 42% of all sales.

243. University presses are minor players in this area, accounting for less than 7% of sales. The only significant players are OUP and, more particularly, Yale in areas such as art history, and MIT in

architecture. But a distinctive feature of publications in art and design is the major role played by the major museums and galleries including Tate Publishing and the British Museum Press, along with the publishing arms of bodies such as English Heritage. Although titles in fine art, art history, and works on individual artists are collectively responsible for only 10-15% of titles sold, their sales and revenues amount to between 40% and 50% of those for all publishers. This is in part because the scholarly catalogues associated with exhibitions such as the Paul Klee exhibition at Tate Modern in 2013, or the Virginia Woolf exhibition at the National Portrait Gallery in 2014 typically achieve sales of many thousands. Indeed, revenues from catalogue sales are often a key part of the business plan for such exhibitions. It is notable also that for museums and galleries—unlike most other publishers—both sales and revenues come predominantly from paperbacks rather than hardbacks; and they saw significant increases in sales between 2005 and 2014, in contrast to the falls experienced by most publishers.

244. Art and design is also characterised by the strong role of specialist commercial publishers and imprints such as Laurence King, Phaidon, Prestel, Taschen, and Thames & Hudson, alongside the imprints of other commercial publishers with more generic lists, including Bloomsbury and Penguin Random House. Together, they account for just under half of all sales, though they publish less than a third of the titles recorded with sales. Collectively, however, these major commercial publishers of titles in art and design—though there are strong variations between them—saw their sales fall between 2005 and 2014 by nearly 30%, and their revenues fall also, by 11%. Since there were increases in the number of titles, average sales per title fell sharply too, from 163 to 105.

245. Across the different subject areas within art and design, this pattern of falling retail sales was common in all except design and commercial art, which showed an increase in sales and revenues of

64% and 88% respectively, though it is not clear whether this was the result of changes in the use of the BIC subject classification. Elsewhere, the falls were particularly sharp in architecture (including architectural history), photography, and monographs on individual artists.

246. The analysis of the REF data undertaken for this project shows that 826 titles published between 2008 and 2013 from a wide range of publishers featured in submissions to the REF2014. They represent, of course, only a small sub-set of all the academic books published in art and design, and BookScan data indicates that relatively few of them achieved significant retail sales in the UK. During the seven years 2008 to 2014 (the REF publication period plus one year), the submitted version of only 45% of those titles achieved any UK retail sale: 108 (13%) had sales of 100 or more, and 24 (3%) had sales of more than a thousand. Only 39 (5%) of the titles achieved over the seven years UK retail sales at the 2014 average rate for all academic books (as defined in this section) in art and design.

8.5.2 Music and dance

	2005				2014				change			
	sales	titles	s/t	cash	sales	titles	s/t	cash	sales	titles	s/t	cash
Music & dance												
Paperback	53,391	1,034	52	£ 702,266.00	65,845	539	122	£ 829,110.00	23%	-48%	135%	18%
Hardback	9,377	676	14	£ 262,199.00	41,980	1,224	34	£ 771,406.00	348%	81%	143%	194%
Totals	62,768	1,710	37	£ 964,465.00	107,825	1,763	61	£ 1,600,516.00	72%	3%	65%	66%

Table 4: UK retail sales for academic books in music and dance

247. Any detailed analysis of the performing arts is problematic, since BookScan data does not provide a separate category for drama and theatre; and a large categorisation of 'artist biographies' includes many popular trade publications in the form of biographies of rock musicians, film stars and the like which cannot without huge manual

effort be disaggregated from academic or scholarly works. We focus here, therefore, on music and dance, which though small compared to art and design, provides a sharp contrast to the general trend in the arts and humanities: for sales rose by over 70% to 108k, with revenues of £1.6m; and the rise in hardback sales was very strong. Overall, the number of titles for which sales were recorded rose by only 3%, to 1.8k; but sales per title rose from 37 to 61. This pattern was evident across many of the main publishers active in this area, including OUP, Bloomsbury, Faber, and Penguin; but why music and dance should have bucked the trend we shall find evident in other subject areas is unclear.

248. Our analysis of the REF data shows that 637 titles in all the performing arts published between 2008 and 2013 featured in submissions to the REF2014. Again they represent only a small subset of all the academic books published in the performing arts; and BookScan data again indicates that relatively few of them achieved significant UK retail sales. During the seven years 2008 to 2014, the submitted version of just 45% of them had any UK retail sale. One had sales of more than a thousand, and 36 (6%) had sales of more than 100. Only 71 (1%) of the titles achieved over the seven years UK retail sales at the 2014 average rate for all academic books (as defined in this Section) in the performing arts.

8.5.3 Communications and media

	2005				2014				change			
	sales	titles	s/t	cash	sales	titles	s/t	cash	sales	titles	s/t	cash
Comms & media												
Paperback	90,250	1,772	51	£ 1,126,350.96	90,268	3,225	28	£ 1,210,111.67	0%	82%	-45%	7%
Hardback	12,250	354	35	£ 191,787.98	9,461	701	13	£ 200,324.75	-23%	98%	-61%	4%
Totals	102,500	2,126	48	£ 1,318,138.94	99,729	3,926	25	£ 1,410,436.42	-3%	85%	-47%	7%

Table 5: UK retail sales for academic books in communications and media studies

249. The number of titles in communications and media studies recorded with sales rose by 85%, to 3.9k; but both sales and revenues were broadly static, at c100k and £13-14m respectively. The result was that sales per title nearly halved. Overall, the shift in favour of hardback sales evident in other subject areas was reversed, although the pattern was different in the area of popular culture and media, where hardback sales rose by more than two-and-a-half times, whereas in film TV and radio they fell by more than half.

250. University presses published 39% of the titles with recorded sales in 2014, but only 13% of total sales and 16% of revenues (both figures showing falls as compared with 2005). North American university presses were responsible for twice as many titles as their UK counterparts, though total sales and revenues were broadly similar; and for both UK and American presses, sales and revenues per title were much lower than the average for all publishers.

251. Among commercial presses, Bloomsbury and Faber were the key players, each with sales and revenues larger than all UK or American university presses, and with sales per title much higher. The British Film Institute was also a major player in film and TV studies, again with sales per title higher than the average for all publishers.

252. Of the two key subject areas in the BIC classifications, film TV and radio had five times as many titles and three times as many sales in 2014 as popular culture and media. And the two areas showed very different trends between 2005 and 2014. In film, TV, and radio, sales fell despite an 80% increase in titles; but in popular culture and media, sales rose strongly, along with a doubling of the number of titles.

253. Our analysis of the REF data shows that 590 titles in communications and media studies published between 2008 and 2013 featured in submissions to the REF2014. BookScan data indicates that during the seven years 2008 to 2014, the submitted version of just 42% of

them had any UK retail sale. Four (including two novels) had sales of more than a thousand, and 25 (4%) had sales of more than 100. Only fourteen (4%) of the titles achieved over the seven years UK retail sales at the 2014 average rate for all academic books (as defined in this Section) in communications and media studies.

8.5.4 History

	2005				2014				change			
	sales	titles	s/t	cash	sales	titles	s/t	cash	sales	titles	s/t	cash
History												
Paperback	1,280,241	5,363	239	£ 11,442,200.07	1,060,036	8,142	130	£ 10,351,689.64	-17%	52%	-45%	-10%
Hardback	408,462	3,027	135	£ 7,341,915.23	528,289	5,162	102	£ 9,316,600.93	29%	71%	-24%	27%
Totals	1,688,703	8,390	201	£ 18,784,115.30	1,588,325	13,304	119	£ 19,668,290.57	-6%	59%	-41%	5%

Table 6: UK retail sales for academic books in history (exc. ancient history)

254. History, along with art and design, is one of the two big subject areas in terms of both titles published and sales. The number of titles in history recorded with sales rose by 59%, to 13.3k; but sales fell by 6%, to just under 1.6m. The result was that sales per title fell from 201 to 119; but in cash terms revenues rose by 5% to £19.7m. As in other subject areas, the shift in favour of hardback sales was marked: sales of hardback rose by 29%, so that in 2014 they accounted for a third of all sales, as compared with less than a quarter in 2005.

255. University presses are major players in terms of titles with recorded sales. But the data suggests that they did not expand their outputs as rapidly as other publishers: while they were responsible for 37% of titles with sales in 2005, this fell to 28% in 2014, with roughly equal representation of UK and North American presses (dominated by CUP and OUP for the UK, and Yale for North America). And since university presses tend to publish more specialist titles, their sales are much lower than for commercial publishers: average sales per title were 24 in 2014, as compared with 119 for all publishers,

though the university press average did not fall nearly as sharply as the all-publisher figure. It is also noticeable that while university presses accounted for 6% of all sales in history in 2014, their revenues were 8% of the total for all publishers (with both figures showing increases since 2005). Sales revenues per title were thus significantly higher than the average for all publishers; and university presses were more successful than many other publishers in increasing their prices.

256. Major commercial presses with significant sales in history include Palgrave, Taylor & Francis, and Wiley among the specialist academic and professional publishers, along with the various imprints of Bloomsbury, Faber, Hachette, Penguin Random House, Profile, and the more specialist History Press. Collectively, they published 5.7k (43%) of the titles with sales data collected in 2014, up from 3.8k in 2005. But their sales fell by 12% to 1.1 million (72% of the total), and their revenues by 4% to £13.5m (69% of the total). Average sales per title , though much higher than for university presses, fell from 337 to 200. But it is important to note that there is a long tail of smaller independent publishers which are collectively responsible for roughly a quarter of all sales, titles, and revenues.

257. In terms of the subject areas in the BIC classifications, biography and military history dominate: together they accounted in 2014 for 43% of titles, but 65% of sales and revenues, with sales per title more than twice as high as those in other areas of history. It is noticeable, however, that the numbers of titles, sales, and revenues all tended to increase between 2005 and 2014 in other areas of history, while sales for military history were static, and for biography they fell by a third.

258. Our analysis of the REF data shows that 1,657 titles in history published between 2008 and 2013 featured in submissions to the REF2014. As in other subject areas, they represent only a small

subset of all the academic books in history; and BookScan data indicates that during the seven years 2008 to 2014, the submitted version of 46% of them had any UK retail sale. Of those, 144 (9%) had sales of more than one hundred, while 36 (2%) had more than a thousand, and three had more than ten thousand (with Keith Jeffery's *MI6: The History of the Secret Intelligence Service 1909-1949* top of the list). Only 48 (3%) of the titles achieved over the seven years UK retail sales at the 2014 average rate for all academic books (as defined in this Section) in history.

8.5.5 Ancient history

	2005				2014				change			
	sales	titles	s/t	cash	sales	titles	s/t	cash	sales	titles	s/t	cash
Ancient history												
Paperback	91,978	712	129	£ 939,338.59	96,933	1,070	91	£ 1,083,758.18	5%	50%	-30%	15%
Hardback	18,113	389	47	£ 384,019.40	30,098	838	36	£ 606,682.40	66%	115%	-23%	58%
Totals	110,091	1,101	100	£ 1,323,357.99	127,031	1,908	67	£ 1,690,440.58	15%	73%	-33%	28%

Table 7: UK retail sales for academic books in ancient history

259. Works on classical literature are included in the figures presented for literature in English and other languages considered below. But the BIC classifications do include a separate category for ancient history, where the number of titles recorded with sales rose between 2005 and 2014 by 73%, to 1.9k; and sales by 15%, to 127k. Since titles rose faster than sales, sales per title fell from 100 to 67, while in cash terms total revenues rose by 28% to £1.7m. Again, there was a shift towards hardback, where sales rose by 66%, while paperback sales rose by only 5%.

260. Among university presses, CUP and OUP dominated. Between them, they accounted for a third of the titles from all publishers with sales in 2014, although only 13% of sales and 17% of revenues. Their sales and revenues per title thus tend to be lower than the average for all

publishers, though both sales and revenues increased between 2005 and 2014, by 17% and 23% respectively.

261. Among commercial publishers, Abacus (Hachette), Penguin, Thames & Hudson, and Profile are the major players, the latter having expanded rapidly especially through the publications of Mary Beard. Publishers such as Bloomsbury, Palgrave, and Taylor & Francis are much less prominent.

262. Our analysis of the REF data, taking classics as a whole, shows that 460 titles published between 2008 and 2013 featured in submissions to the REF2014. BookScan data indicates that during the seven years 2008 to 2014, the submitted version of just over half (55%) of them had any UK retail sale. Of those, 20 (5%) had sales of more than one hundred, and four of more than a thousand. Only seven (2%) of the titles achieved over the seven years UK retail sales at the 2014 average rate for all academic books (as defined in this Section) in ancient history.

8.5.6 Literature

	2005				2014				change			
	sales	titles	s/t	cash	sales	titles	s/t	cash	sales	titles	s/t	cash
Literature												
Paperback	616,837	5,471	113	£ 4,083,200.31	290,010	6,537	44	£ 3,082,801.24	-53%	19%	-61%	-25%
Hardback	77,941	2,399	32	£ 1,417,747.42	75,604	4,283	18	£ 1,570,782.29	-3%	79%	-46%	11%
Totals	694,778	7,870	88	£ 5,500,947.73	365,614	10,820	34	£ 4,653,583.53	-47%	37%	-62%	-15%

Table 8: UK retail sales for academic books in literature

263. As we have noted above, the literature category covers academic works in English and other languages, including classical languages. The number of titles recorded with sales rose by 37%, to 10.8k, or about four-fifths of the numbers in the two biggest subject areas, art and design, and history. But sales were only around a quarter of those shown in history, and between 2005 and 2014 they fell by

nearly half, to 365k. The result was that sales per title fell from 88 to 34; and in cash terms, revenues fell by 15% to £4.7m. Hardback sales were broadly static, while paperback sales fell by more than half.

264. University presses published more than half the titles with sales in 2005 (51%), though this fell slightly, to 47%, in 2014. As in history, it seems that the university presses expanded their outputs less rapidly than other publishers. North American presses feature less strongly in terms of sales than in history, though there is a long tail of US presses with sales per title in single figures. Indeed, for all university presses, the focus on specialist titles means that their sales are much lower than for commercial publishers: average sales per title were 15 in 2014, as compared with 34 for all publishers, though again the university press average fell much less sharply than the all-publisher figure. Moreover, they accounted for 20% of the sales for all publishers (up from 12% in 2005), and for 25% of sales revenues. As in history, sales revenues per title were thus significantly higher than the average for all publishers.

265. The commercial presses with the largest sales in literature are the various imprints of Bloomsbury, Faber, Penguin Random House, and Taylor & Francis. Collectively, the large commercial publishers (including also Hachette, Longman, Palgrave, W W Norton, and Wiley) published 3.6k (33%) of the titles with sales in 2014, up from 2.5k in 2005. But their sales fell by more than half to 222k (60% of the total), and their revenues by a quarter to £2.6m (56% of the total). Average sales per title, though much higher than for university presses, fell from 202 to 62. The long tail of smaller independent publishers is again evident: collectively they are responsible for roughly a fifth of sales, titles, and revenues; and in terms of sales per title, smaller presses such as Canongate and Granta are as successful as many of their larger colleagues.

266. In terms of subject areas in the BIC classifications, literary criticism dominates: it accounted in 2014 for 70% of titles, although only 38% of sales and 43% of revenues. By contrast, although literary biography accounted for only 12% of titles, it had 30% of sales and revenues, with sales per title almost five times as high as for criticism. Literary theory was much the smallest area, with 4% of titles and 6% of sales.

267. Our analysis of the REF data shows that literature was by far the biggest in terms of titles submitted. A total of 3,269 titles published between 2008 and 2013 featured in submissions to the REF2014: 2,214 in English, and 1,055 in modern languages (a further number of c100 were submitted in classics, though it is not possible to disaggregate them from works in ancient history and related subjects). The titles included a number of novels and volumes of poetry submitted by academics in creative writing, as well as some translations of creative works by authors writing in languages other than English.

268. The BookScan data indicates that the novels and volumes of poetry from writers such as Jeanette Winterson and Carol Ann Duffy dominated the lists of books submitted to the REF that had significant UK retail sales. Nevertheless, including all the creative writing titles, during the seven years 2008 to 2014, the submitted version of only just over half (54%) of the books submitted in English literature and language had any UK retail sale. Of those, 355 (16%) had sales of more than one hundred, and 128 (6%) of more than a thousand. Of the titles submitted in modern languages, 37% achieved at least one UK retail sale of the submitted version: 30 (3%) had sales of 100 or more, and 4 had more than a thousand.

269. The inclusion of novels and poetry in the REF submissions makes it impossible to make any meaningful comparisons with the average

rates of sales for academic books (as defined in this section) in literature.

8.5.7 Philosophy

	2005				2014				change			
	sales	titles	s/t	cash	sales	titles	s/t	cash	sales	titles	s/t	cash
Philosophy												
Paperback	136,580	3,802	36	£ 1,916,604.52	102,531	3,643	28	£ 1,510,632.36	-25%	-4%	-22%	-21%
Hardback	16,259	1,144	14	£ 282,519.12	16,937	1,759	10	£ 377,172.27	4%	54%	-32%	34%
Totals	152,839	4,946	31	£ 2,199,123.64	119,468	5,402	22	£ 1,887,804.63	-22%	9%	-28%	-14%

Table 9: UK retail sales for academic books in philosophy

270. Philosophy is a much smaller subject area than the three biggest: art and design, history, and literature. The number of titles in philosophy recorded with sales in 2014 was 5.4k, a rise of 9% since 2005. But sales fell by 22%, to 119k, with the result that sales per title fell from 31 to 22 (a figure much lower than in other subject areas); and in cash terms revenues fell by 14% to £1.9m. As in other subject areas, there was a shift in favour of hardback sales, which remained stable (albeit with a 54% increase in titles), while paperback sales fell by 25%.

271. University presses are dominant to an extent not seen in other subject areas. They published the majority of the titles with sales in 2005 (70%), though this fell to 61% in 2014; as in other subjects the university presses expanded their outputs less rapidly than other publishers. OUP is the dominant player, accounting for just under a quarter of *all* publishers' sales in philosophy in 2014, and more than twice the sales of all North American presses; OUP's sales per title, at 26, were slightly above the average for all publishers.

272. The commercial publishers with the most significant presence in philosophy are Bloomsbury, Taylor & Francis, and Wiley. Together with Palgrave (a much smaller presence), they published 1,670

(31%) of the titles with sales in 2014, up from 1260 (25%) in 2005. But their sales fell by a third to 49k (41% of the total), and their revenues by a fifth to 832k (44% of the total). Average sales per title fell from 60 to 29.

273. The data does not make it possible to analyse titles and sales in terms of subject areas within philosophy.

274. Our analysis of the REF data shows that 273 titles published between 2008 and 2013 featured in submissions to the REF2014. BookScan data indicates that during the seven years 2008 to 2014, the submitted version of nearly three-fifths (59%) of them had any UK retail sale. Of those, 22 (8%) had sales of more than one hundred, and two of more than a thousand. Only eleven (4%) of the titles achieved over the seven years UK retail sales at the 2014 average rate for all academic books (as defined in this section) in philosophy.

8.5.8 Religion and theology

	2005				2014				change			
	sales	titles	s/t	cash	sales	titles	s/t	cash	sales	titles	s/t	cash
Religion & theology												
Paperback	196,078	4,858	40	£ 2,000,258.38	205,338	6,790	30	£ 2,275,183.36	5%	40%	-25%	14%
Hardback	20,382	1,285	16	£ 379,057.85	23,233	2,451	9	£ 520,605.30	14%	91%	-40%	37%
Totals	216,460	6,143	35	£ 2,379,316.23	228,571	9,241	25	£ 2,795,788.66	6%	50%	-30%	18%

Table 10: UK retail sales for academic books in religion and theology

275. The number of titles in religion and theology recorded with sales in 2014 was 9.2k, twice that in philosophy, and a rise of 50% since 2005. Sales rose by 6%, to 228k, but since titles rose faster than sales, sales per title fell from 35 to 25 (a little higher than philosophy, but lower than in most other subject areas). In cash terms, revenues rose by 18% to £2.8m. The shift towards hardback sales was not nearly so pronounced as in other subject areas: in 2014, hardbacks still represented only 11% of sales.

276. University presses published just under a third of titles with recorded sales in 2014, and accounted for just over a fifth of total sales (both figures showing falls as compared with 2005). OUP is the overwhelmingly dominant player, with a third of the titles and two-thirds of the sales for all university presses. Unlike the pattern seen in other subject areas, sales per title tend to be higher for the university presses, at 34 in 2014, than the average of 25 for all publishers. Sales revenues per title were also slightly higher than the average for all publishers.

277. The major commercial publishers active in religion and theology are Bloomsbury, Penguin, and Taylor & Francis; Wiley and Palgrave have a much smaller presence. All of them saw sharp declines in sales between 2005 and 2014. But publishing in theology is also characterised by the significant roles played by specialist publishers such as Eerdmans and the InterVarsity Press in the US, and the Society for Promoting Christian Knowledge (SPCK) along with Darton, Longman & Todd in the UK.

278. In terms of subject areas, works on Christianity in general, its history and theology account for 59% of titles and 64% of sales. Sales of general works on Christianity rose by 71% between 2005 and 2014. Works on non-Christian religions and comparative religion represented around a third of titles and of sales, but non-Christian religion sales fell sharply between 2005 and 2014, while in comparative religion they were static.

279. Our analysis of the REF data shows that 460 titles published between 2008 and 2013 featured in submissions to the REF2014. BookScan data indicates that during the seven years 2008 to 2014, the submitted version of just over half (52%) of them had any UK retail sale. Of those, 33 (7%) had sales of more than one hundred, and four of more than a thousand, with Diarmaid MacCulloch's *History of Christianity* top of the list. Only twenty (4%) of the titles achieved

over the seven years UK retail sales at the 2014 average rate for all academic books (as defined in this Section) in religion and theology.

8.5.9 Linguistics

	2005				2014				change			
	sales	titles	s/t	cash	sales	titles	s/t	cash	sales	titles	s/t	cash
Linguistics												
Paperback	80,108	1,414	57	£ 1,051,948.60	35,419	2,240	16	£ 707,912.70	-56%	58%	-72%	-33%
Hardback	16,572	506	33	£ 231,328.19	3,299	753	4	£ 104,605.23	-80%	49%	-87%	-55%
Totals	96,680	1,920	50	£ 1,283,276.79	38,718	2,993	13	£ 812,517.93	-60%	56%	-74%	-37%

Table 11: UK retail sales for academic books in linguistics

280. Linguistics is the smallest subject area we consider in this section. The number of titles recorded with sales rose between 2005 and 2014 by more than half, to 3k; but sales fell also by more than half, to 39k, and sales per title fell from 50 to 13, the lowest figure in any subject area. Cash revenues fell by more than a third to £812k, and the shift in favour of hardback seen in other subject areas was not evident; hardback sales fell even more catastrophically than paperback.

281. University presses represented around 40% of both titles and sales in 2014, with CUP and OUP again by far the dominant players; North American presses were only a small presence. Among commercial presses, Taylor & Francis is the major player, with around a quarter of all sales and revenues, while Bloomsbury, Wiley, and Palgrave all have significant sales, with the latter expanding its presence from a small base.

282. The data does not allow for an analysis of the sales of titles submitted to the REF.

8.6 Conclusions

283. Comprehensive and reliable statistical data on sales of academic books is notable mainly by its absence. Data from the Publishers Association in the UK aggregates all academic and professional books, including textbooks, and in all subjects; while data from Nielsen BookScan covers only retail sales. The lack of any clear definition of 'academic books' exacerbates the problems. Nevertheless, analysis of the available data reveals some clear trends over recent years.

284. First, the two biggest subject areas by far across all publishers are art and design (including architecture, photography and art history) and history, and their dominance is growing, although university presses have a more even spread of subjects than most commercial publishers.

285. Second, there has been a shift from print to digital. On the retail side of the market, there are signs that the shift is slowing down. On the library side, though we lack any comprehensive data, the shift is driven by librarians seeking access to a wider range of content directly related to the academic demands of their institutions and users; though there is thus a tension with users' preference for print.

286. Third, UK retail unit sales of books have fallen in total, and overall revenues have fallen significantly in real terms, too. But the number of titles sold has risen strongly, in all subjects except music and philosophy, where it has remained broadly stable.

287. Fourth, both university presses and commercial publishers are strongly involved in the production and sale of academic books. But except in subjects such as philosophy, commercial publishers in the aggregate have more titles and bigger sales. Oxford and Cambridge university presses have the biggest number and range of titles of all academic book publishers; but sales per title are on average significantly lower for university presses than for commercial

publishers. Nor have university presses expanded their lists at the same rate as the average for commercial publishers.

288. Fifth, of the versions of titles submitted to the REF2014, around a half in most subjects achieved at least one retail sale in the UK in the years 2008-2014; and only a small minority reached UK retail sales of a thousand.

9. Discoverability, Demand, and Access

9.1 Introduction

289. In the light of the evidence about sales and readership provided in other parts of this report, we draw in this Section on a study undertaken for the project by Richard Fisher and Michael Jubb on the roles of publishers, libraries, booksellers and other intermediaries in stimulating and satisfying demand for academic books. We distinguish between sales and demand, between institutions and individuals, between availability and access, and between physical print and e-books; and we take full account of the importance of discovery and discoverability.

9.2 Demand, price and marketing

290. Monographs from UK academic publishers are now typically priced at £75 or more in hardback; and in the US, average hardback prices for scholarly books has been rising far faster than the general inflation rate, though US university press prices remain significantly lower than for UK publishers (Greco et al, 2014). For many traditional publishers, it is an article of faith that the sales demand for most academic books is price-inelastic; and they point to the performance of paperbacks selling perhaps half or a third of the original hardback units although at half the price. Nonetheless, pricing models have varied greatly, with American university presses tending to pursue sales maximisation, with lower prices, and to emphasise domestic demand more than is common among European university presses or commercial publishers. Even so, as a recent report observes 'libraries may be comfortable spending $45 or more for a book, but few individuals are' (Esposito et al 2017).

291. Whatever the pricing model, there is a risk that publishers' experiences in previous decades may unduly constrain their sense of potential sales demand, and market possibilities, in a world where

the economics of academic books have been transformed by digital short-run printing, by Amazon's more-or-less-immediate satisfaction of demand for sales, and by the potential for global online access. And it is important here to distinguish between demand from readers (which may be met via a library) and the demand that is – or has the potential to be- met through sales. Moreover, there is some evidence—not least from OA initiatives—that there is a potentially-large geographically-dispersed and non-specialist audience for academic books that existing print-based publishing models are failing to reach (Gatti, 2015). A key challenge and priority for all those concerned with academic books—publishers, libraries and intermediaries—is to turn that potential into effective demand, from both purchasers and library readers. For no-one is content with the current position.

292. We have noted at several points that UK publishers in particular have responded to the buoyant supply from authors by increasing the numbers of titles they publish, even while sales per title have fallen. Since margins are tight, the effort devoted to marketing each title—both by publishers and by other agents—has dropped, at a time when the need for it has grown. Moreover, survey evidence suggests that academic authors attach great importance to publishers' marketing and sales services, and would be reluctant to take it on themselves (Collins et al, 2016).

293. Two decades ago, a network of wholesalers, distributors, agents, library suppliers, booksellers and others all saw promoting and generating sales for academic books—through catalogues, advertisements, exhibits at Book Fairs and academic conferences, and other mechanisms—as a key part of their remit. But the digital transition, consolidations in the supply chain, and the impact of Amazon, have together transformed that picture. For many of these agents the core priority is now the rapid satisfaction of existing sales demand rather than seeking to expand new demand. One of

Amazon's most fundamental impacts has been in this sense indirect, on the behaviours of other agents in the supply chain.

9.3 Demand from institutions

294. We noted in Section 3 the changes in academic libraries in recent years, and in particular the pressures that have led to a shift from 'just-in-case' to 'just-in-time' collection-building. The rise of e-books has transformed libraries' ability to achieve that shift. Library suppliers have created large collections of e-books, and new web-based discovery and access systems (see Sections 3.3 and 3.4) enable them to provide information about those books direct to library users. This makes it possible for users to find and identify books relevant to their needs through the library's discovery service before the library makes any decision to purchase them. Since around 2010, 'patron-driven 'and 'demand-driven' (PDA and DDA) models have become increasingly common as one of the key ways for academic libraries to develop their collections. The models vary in detail, and in some cases, as with Yankee Book Peddler (YBP, now part of EBSCO), DDA can be one of the purchase options associated with approval plans. DDA can also be used as a model for acquiring print books, though the mechanics are more complex, and it is neither as effective nor as widespread as DDA for e-books, not least because of the time taken to supply physical books; some libraries report that significant proportions of print titles ordered via DDA are never retrieved by the requester.

295. Current DDA models require a complex technical infrastructure, though some booksellers suggest that it could be simplified if, for example, libraries were prepared to forego MARC records and to make use of existing e-commerce routes. With variations in practical aspects of the model agreed between aggregators and libraries, DDA implies that metadata about the titles in a package appears in the library's discovery service; and as a result, the amount of content

available via libraries from aggregators' sites has increased dramatically. Once a certain number of pages have been read, or a number of short-term loans (STL) made, the library automatically purchases the title, without the user(s) necessarily knowing that it had not always been part of the library's collection (unless the library chooses to alert them). STL can itself prove an efficient means of meeting demand, and considerably more efficient than inter-library loans (ILL). Finally, purchase under DDA models may take a number of forms, from permanent acquisition to licenses for access with restrictions on the number of uses, number of simultaneous users and so on.

296. Such arrangements have many attractions for libraries: their users have access to more titles, the costs of acquisitions typically fall, and the development of collections is directly related to the activities of students and staff. In a virtuous circle, all this can enable libraries to demonstrate that they are operating efficiently and effectively in meeting the needs of the university, its staff and students, thus helping to sustain (or even to enhance) library budgets.

297. On the other hand, DDA poses problems for publishers: purchases are delayed, or may never take place, as compared to the 'just-in-case' library acquisitions model (which thus creates a cash-flow problem for publishers); short-term loans replace what might otherwise have been outright purchases (although this may be ameliorated by the new "Access to Own" model introduced by ProQuest); and many sales may be lost altogether. As a result, revenues fall. The fundamental problem for publishers is that while the DDA records distributed to libraries, and the titles in their DDA pools, have increased massively, the numbers of titles purchased – whether as print or e-books—have fallen; YBP data suggests that for American libraries they fell by 24% between 2011 and 2015 (Morris-Babb, 2016).

298. As a response to these problems, many publishers have developed 'evidence-based acquisition' (EBA) models as a hybrid between DDA and the outright sale of a complete collection. Libraries pay an upfront fee at a discount to the full cost of a collection, and users have access to that collection for an agreed period (usually a year), at the end of which the library decides which titles to purchase, based on levels of usage or other criteria such as the fit with its collection priorities. The number of titles in a collection may be negotiated between the publisher and the library, and again, precise arrangements vary; under some models, for example, libraries agree on an amount, in addition to the access fee, that they will spend on purchases at the end of the access period, with or without flexibility on carry-over to a subsequent period. The advantage to libraries is that as with DDA, they acquire only what their users need, and they may have more control over the selection criteria and expenditure than with DDA. Moreover, the technical infrastructure needs are not so complex. For publishers, the advantage is essentially the fee they receive upfront.

299. The balance of advantage as between DDA and EBA for libraries and for publishers varies according to individual circumstances. Even the most comprehensive of the aggregators' DDA packages typically do not cover *all* the titles of every individual publisher, and some publishers have withdrawn titles from such packages, while insisting on the use of DRM mechanisms to protect their content against unlicensed use. But there are obvious advantages for libraries in dealing with the major aggregators, and the support they can offer in enhancing acquisition workflows, rather than dealing separately with a large number of publishers. Nevertheless, it can make sense for libraries to buy titles direct from publishers (where DRM is typically much more relaxed, if present at all), title by title, package by package, or via EBA, particularly where the library requires a significant volume or proportion of the titles from that publisher.

There is thus a growing literature on the relative advantages of different acquisition models.

300. Taken together, the advent of the widespread availability of e-books and large-scale aggregations, of the platforms to gain access to them, and of web-scale knowledge bases, have brought great changes to the relationships between publishers, libraries and library suppliers, as we have noted in Sections 3.2, 3.3 and 3.4 . We may summarise as follows:

- first, despite readers' continuing preference for print when reading books (unlike journal articles), there has been a significant shift in library purchasing in favour of e-books;
- second, this has had major financial impacts on publishers, libraries and suppliers, with pressures on revenues for publishers and also suppliers, since margins and discounts for e-books tend to be smaller than for print;
- third, the development of DDA, STL, and EBA models, along with approval plans, has brought major changes in the patterns of library acquisitions, with libraries seeking the most cost-effective means of acquiring the books they need;
- fourth, the many variations in terms and conditions associated with those models, and the frequency with which they have been modified in the light of experience on all sides, have brought difficulties for all parties in judging what works best for them and their partners.

301. Some publishers criticise libraries for having abandoned responsibility for collection development, passing it to a combination of the major aggregators and library users. Some suppliers also argue that libraries are in increasing danger of disintermediation, as large companies take responsibility for all the key systems to meet

the content needs of students and academics. As we noted in Section 3.3, however, for at least some of the larger and better-resourced libraries, the changes outlined above, together with the use of online reading lists and research management systems, are enabling them to link collection development more closely to institutional strategies for teaching and learning and for research. But it seems unlikely that it will mean acquiring more books, whether print or digital.

9.4 Demand from individuals

302. Increases in the availability of data and information about patterns of libraries' behaviours in acquiring books is not so far matched by similar intelligence about patterns of demand from individual consumers, whether faculty, early career researchers or non-specialist readers. Estimates suggest that for some American university presses (and in some subjects) sales demand from individuals may account for up to 50% of sales (Anderson et al, 2014). Many sales derive from the adoption of specific titles on postgraduate courses; and from publishers' perspective, such sales have been greatly facilitated by Amazon and by digital short-run printing. Survey evidence also indicates that many academics buy their own books, especially in print form, rather than relying on libraries (Collins et al, 2016; Tenopir et al 2012). But even the most acquisitive academics make choices about which titles to purchase; and for students, the library remains a key vehicle for access to books.

303. Scholars often complain that—whether the books are published by trade publishers such as Penguin or Harper Collins, by more specialist commercial or university presses—the potential non-specialist demand for academic books is well catered for in only a restricted range of subjects, above all history and biography. Reductions in the range of stock held by many booksellers, along with UK retail sales figures, tend to support this view, even if they

underestimate the impact of many titles. One of the responses from publishers has been to seek to commission and design 'crossover' titles from the outset, rather than waiting for them to emerge serendipitously (the possibilities for which are now limited by the reductions in marketing efforts to which we have referred). For all these reasons, some publishers see the gap between academic and trade publishing as having widened in recent years.

304. But one area of sales success in recent years has been backlist titles. Changes in production workflows, digitisation, new printing technologies, and the growth of e-commerce have led many publishers to revalue their backlists, in both print and e-book forms. The nature and profile of the sales generated by the many programmes of backlist paperbacks are not well-understood; but one consequence has been to shift the sales profile of many academic publishers in favour of the backlist, although this may reflect in part a weakening of front-list sales.

9.5 Geographies of demand

305. Although some American publishers have significant sales in the UK), the overwhelming proportions of their sales are concentrated in North America (AAUP, 2017b; Morris-Babb, 2016). By contrast, scholarly publishers based in the UK (both university presses and commercial publishers) cannot rely solely on their much smaller domestic market; they are much more export-oriented. Some of our interviewees spoke of 40% or more of their sales coming from the US, which often has an impact on the kinds of books they publish, and how.

306. But one of the core features of the publishing ecology for scholarly books in the arts and humanities—unlike that for scientific journals—is that it is multilingual. The strong publishing traditions in major western European languages, as well as in Hebrew, Arabic and many Asian languages are reflected in the books submitted to

REF 2014; and they are central to the interests of many UK and US-based scholars across a wide range of disciplines including history, classics, philosophy and theology as well as non-English literatures and cultures. There is also a long-standing tradition of high-level translation both from and into English, with historic financial support from the French and German governments, although the numbers of works translated have shrunk in recent years.

307. Associated with this linguistic diversity, there are significant differences in the geographies of demand for books in the arts and humanities as distinct from the sciences. Hard evidence is elusive, but major UK publishers report continued levels of significant sales in Germany, Scandinavia and the Netherlands, but rather lower—and declining—levels in southern Europe. The trends vary by subject, but many of the larger UK publishers report that demand in Europe beyond the UK for academic books exceeds that within the UK itself, although it is not clear what impact Brexit might have.

308. Overall, the larger UK publishers in the humanities report sales profiles of roughly two parts European and two parts American (north and south) to one part Asian-Pacific. We do not, of course, know whether that ratio is indicative of potential demand. Our interviewees have found that a focus in higher education in Asia and other emerging markets on the sciences and applied social sciences (especially business, management and finance) rather than the arts and humanities limits sales potential. And in countries such as Japan, where demand has traditionally been high, they have experienced stagnant or declining sales for nearly two decades, while the anticipated growth in China has so far proved problematic (Morris-Babb 2016). India was cited by our interviewees as having high potential, although there too there are fiduciary and regulatory challenges in seeking to realise that potential.

309. Thus, while four decades ago UK publishers reorganised themselves into export-driven businesses, with important implications for their commissioning policies, the current view seems to be that it is unlikely that emerging markets hold the promise of transformative increases in sales for academic books in the arts and humanities. Nonetheless, data from some OA initiatives indicate significant levels of interest in such books; and it would be wrong to ignore the potential demand from across the world from readers for whom access to scholarly books in physical print form is currently problematic at best.

9.6 Discovery and discoverability

310. Potential demand can be turned into effective demand only if potential purchasers (individuals and library acquisition staff) and library users become aware of a book's existence, and where and how they can acquire it, to purchase or to read. To state the obvious, what potential purchasers and readers are unaware of they can neither purchase nor acquire via a library. Discoverability is thus of fundamental importance in a world of information abundance, and where scholarly outputs of all kinds are increasing rapidly. But none of the databases on which discovery services are based is fully-comprehensive, with particular gaps in the coverage of the smallest publishers' lists and of foreign language titles; and the limited marketing efforts to which we have already referred give rise to a number of problems.

9.6.1 Metadata

311. In the context we have outlined, it is critically important that comprehensive information both about new and forthcoming titles, and about what is still available on back-lists, flows effectively through the supply chain; for there are links between the availability of high-quality metadata and volumes of both sales and library usage (Bilde, 2016). A relative lack of attention to the efforts involved in

this has been one of the most significant barriers to the more rapid penetration of OA books, though there are currently moves to address this problem. (Collins et al, 2016; Milloy et al, 2016). But for all academic books, every possible step must be taken to ensure that accurate, comprehensive, high-quality metadata flows through the supply chain to academics and other end-users. That is a complex business, however, and the systems do not always work as effectively as they might.

312. The creation of metadata starts with publishers several months before publication. The largest presses publish thousands of new titles a year, the middle-sized ones a few hundred, and a long tail of small publishers release only a few titles each year. The digitisation of back-lists, making them available as e-books or via PoD, adds to the volume, along with the need to produce metadata records for each of the different formats in which a title is available; and larger publishers in particular are also seeking to produce metadata at chapter level. The huge—and increasing—volumes of metadata mean that machine-to-machine interfaces which require minimal manual intervention are essential. That in turn implies the use of formats and standards to structure the descriptive and administrative metadata transmitted through the supply chain.

313. ONIX is the standard format used by publishers, but it can be challenging for large publishers and daunting for smaller ones. The creation of metadata starts in the editorial process, and since many smaller publishers do not employ specialists for this purpose, editorial staff may have sole responsibility for creating metadata. But small mistakes in metadata content and formats, or delays in making metadata records available, can have a significant impact on discoverability, sale, and use for individual titles. Although metadata aggregators, such as Nielsen in the UK and Bowker in the USA, undertake some quality checks and standardisation, ensuring that the metadata is comprehensive and accurate, and that data feeds to

the full range of relevant distributors, wholesalers and booksellers work effectively is of critical importance.

314. But the interests and requirements of the different agents in the supply chain are not congruent. There are tensions between the needs of publishers, distributors and booksellers—for retail sales—on the one hand, and libraries on the other. The ONIX standard essentially meets the needs of the former; but libraries want MARC (Machine Readable Cataloguing) records—created according to internationally-agreed standards and guidelines—to enable them to document and manage their collections and to allow for the creation of collection-wide finding aids. MARC records are typically created not by publishers, but by metadata vendors and national libraries, making use of information supplied to them by publishers (though some larger publishers are now beginning to produce MARC records themselves). The ONIX and MARC standards result in very different kinds of records: the administrative data on marketing, production, price and availability for fulfilling sales orders that is of critical importance for ONIX records is not included in MARC records, while MARC records contain much more fine-grained subject classification codes than those needed in ONIX records, so that national and global aggregations of bibliographic data can be created and searched covering all the titles held in various collections, in all formats. Given the different interests and responsibilities of the various agents involved in creating, enhancing and transmitting metadata through the supply chain, it is not surprising that the quality and comprehensiveness of the records varies too; and there is considerable duplication of effort.

315. Publishers including CUP, OUP, Wiley, and Taylor & Francis are already taking steps to provide chapter-level metadata, with the explicit aims of enhancing discoverability but also thereby increasing sales and usage in libraries (Publishers Communication Group (PCG), 2016). But at a more profound level, as Anna Faherty notes in her

study of discovery undertaken for this project, there is much more to be done to increase on a much more systematic basis than at present the range of metadata that accompanies books: not just providing information at more granular levels about the contents, but also more comprehensive information about authors and other contributors (including their ORCID identifiers wherever possible) and their institutions; and about 'events' such as reviews and social media comments. All these could, if built more effectively into metadata workflows, help to transform discovery, enabling potential readers, for example, to receive more effective alerts, and to undertake more effective searches in the aggregations of metadata provided via organisations such as CrossRef. But there is also a need for new metadata schemas that better reflect the increasing amounts of scholarship and research in the arts and humanities that fit at best uneasily into traditional subject and disciplinary frameworks. At present we lack the ontologies and other tools that facilitate discovery and connections between books that span disciplinary divides (Pinter, 2016).

9.6.2 Discovery: user experiences

316. But the metadata also needs to be built into user-friendly discovery systems. Without easy and effective discoverability, individual titles and their contents can remain hidden; but many of the systems and tools currently in place for finding and gaining access to scholarly books do not fit well with the expectations and behaviours of either scholars or other potential readers. The processes currently involved in seeking and retrieving information about books have been described as confusing, frustrating, and challenging to navigate (Schonfeld, 2015a, 2015b, 2015c).

317. Google, Amazon and similar services are core search and discovery services for most academics; but they are often of limited use in alerting potential users to titles of which they are unaware. And the

online recommender systems currently provided by Amazon and others are not well-suited to dealing with the highly-specialist world of academic books. There is work to be done before publishers and online booksellers can fulfil the job that the best bricks-and- mortar academic bookshops—like the best online retailers of consumer goods—can do in shaping readers' choices by making them aware of—and stimulating their interest in—titles that they did not know about. Achieving such an outcome is made the more difficult by the relatively coarse-grained BIC subject classifications used in ONIX metadata, and by the lack, for most books, of chapter or section-level metadata

318. As Anna Faherty notes, a key problem from a publisher perspective is that when potential readers are seeking and making decisions about individual books, there is typically no interaction with the publisher. Hence it is critically important that publishers should co-operate closely not only with libraries and booksellers, but with search engines and others through whom potential users get information about their books. It is also important in this context to distinguish between marketing and publicising titles in order to increase awareness (important though that is), and enhancing discoverability. The channels through which potential readers and purchasers find information about books have expanded and diversified, and online behaviours and experiences are very different from those associated with physical bookshops and libraries. Helping customers to discover both front-list and back-list titles means investing more in learning about how readers and purchasers operate in the online environment (acknowledging that academics in a single discipline operate in a wide variety of ways); and improving search and navigation tools to maximise discoverability both for titles and the content within them in that environment. Publishers therefore need to understand more about academic work processes, and where problems occur—not just about successes—in users'

searching for and using the content they need. The recent work by JSTOR Labs (2016) includes some useful pointers.

319. At the very least, search engine optimisation (SEO) is critically important for publishers, which implies that both book and chapter titles need to be considered carefully, and that a wide range of metadata should be employed, including multiple references to content within the book, but also to reviews, social media and the like (where many publishers are now making use of Facebook and Twitter in particular). Links to facilitate effective citation chaining (a core method through which scholars discover books) would also help to transform discovery. And since research suggests that scholars do use publishers' websites to find out about new and existing titles, it is important also that publishers should include on their sites as much information as possible about individual titles and authors. They must also enhance search and navigation tools, not only to facilitate browsing, but also to guide researchers through their search to relevant titles, including the ability to view snippets of content. As Anna Faherty notes, at present, many publishers' sites contain less information than is available from Google or Amazon, and with less good search and navigation. If publishers are to realise their ambitions to increase sales via their own websites, much more attention will have to be paid to these issues.

320. Researchers much regret the loss of opportunities for browsing and evaluating books that has resulted from the much-reduced range of academic books that feature in the stock of all but the largest academic bookshops. It seems unlikely that there will be a resurgence among bricks-and-mortar academic bookshops, or in the range of monographs they stock. But again there are opportunities to enhance booksellers' online catalogues and finding aids, with more comprehensive and better -structured subject coverage and enhanced search and navigation—more specialised than Amazon can offer—with more user-friendly facilities for digital browsing.

9.6.3 Libraries and discovery

321. As we have noted, sales of books to academic libraries tend to be dominated by the large library suppliers. The GOBI (Global Online Bibliographic Information) system run by YBP and operating mainly in North America, provides an interface for searching, selecting and ordering titles from a range of publishers and suppliers, and seeks to support the complete acquisition and collection development workflow for libraries. Other suppliers operate similar services based on their own databases and ordering systems. But none of the databases is comprehensive, and libraries may have to make special efforts to find books from specialist sources.

322. For both print and e-books, suppliers, aggregators and publishers seek to ensure that once libraries acquire a title, their catalogues and discovery systems include metadata in MARC format, and the fact that the e-book is indeed accessible. The processes involved are complex, with corrections and amendments being made at several stages as the metadata is transmitted between publishers, aggregators, knowledge bases and discovery systems (Sherman, 2015); in the UK, the development of the National Bibliographic Knowledgebase to which we referred in Section 3.4 is intended to help reduce complexity and improve accuracy and comprehensiveness.

323. There is an extensive literature on the development of library discovery systems, how they compare with Google and other similar services, and the frustrations often experienced by academics in using them. As Faherty notes, query-based online catalogues were designed for expert librarians, with a requirement for specificity that makes them seem complicated and inflexible to other users. And as we have noted in Section 3.3, the newer web-based discovery systems, with simple unified search interfaces, tend to be geared more to the needs of undergraduates than to postgraduates and

academic staff. Some US university libraries, and others such as the Wellcome Library, have developed systems with facilities for digital browsing and search more attuned to scholarly needs of researchers. But unless libraries more generally develop discovery services directed to their scholarly expectations and needs, then researchers will become increasingly dependent on Google, Amazon, publishers' and other third party services.

324. The performance of the different web-based discovery services adopted by libraries in recent years depends on a number of factors: the coverage of the titles that are included; the scope and quality of the metadata and how content is displayed; the effectiveness of the relevancy rankings; whether libraries incorporate all kinds of content, including, for example, titles in special collections; the inclusion or not of OA titles; and whether or not libraries include e-book titles to which they do not yet have a subscription. Libraries also need to guard against the risk that high-quality material such as monographs can be submerged in a plethora of other content. The systems work effectively only if only the data in the knowledge bases on which they are founded is accurate, comprehensive and up-to date, with constant updates of both descriptive and administrative metadata from publishers, aggregators, libraries, link resolvers and others throughout the supply chain. Both libraries and the discovery service providers have found it problematic to meet these challenges, as both the volumes of e-content and the complexity of the models for acquiring access to it have increased rapidly (van Ballegooie, 2016; Borg 2016). Under any of the various subscription, DDA , EBA, STL or approval plan models, the discovery system must turn on access to large numbers of e-books for the period of the agreement, modify the access period if the title is actually purchased, and turn off access to those titles that have not been purchased at the end of the agreement period. There is considerable scope for things going wrong at any stage; publishers and libraries both complain that this

happens frequently, and that they have limited ability to put things right. Some libraries have also faced difficulties in integrating their discovery systems with their library management systems and link resolvers, though such difficulties have been eased in some cases by the adoption of new cloud-based—sometimes open source—library service platforms.

325. There are related concerns from publishers' perspectives: about lack of visibility and understanding of how data are used, the risk of dilution of their brands which may be lost or hidden in research results, and lack of transparency as to how relevance ranking systems work. These problems are of particular importance as both libraries and publishers are paying greater attention to data on the usage of e-books. There are also concerns that current processes do not always provide effective triggers to ensure either that the metadata for open access books is fully-enhanced, or that open access itself is invariably recognised (Collins et al, 2016). And some smaller aggregators such as JSTOR claim that usage of their content has fallen when libraries have implemented new discovery systems, rather than making use of the system provided by JSTOR itself.

9.7 Access for e-books

326. Once a purchase decision has been made, either by an individual or a library, access to physical books takes much the same form it has done for decades. But the different supply models for e-books in the library and retail markets have significant implications for modes of access. The retail market is dominated by sales of e-book downloads in various formats appropriate either for e-book readers, such as Amazon's Kindle, or for laptops and tablets. Downloads are sold outright for users to keep, although Digital Rights Management (DRM) systems may restrict usage in various ways.

327. In the library market, by contrast, acquisitions usually take the form of purchasing access to e-books which are hosted on a third-party

website. Both aggregators and the larger publishers have established web-based platforms for this purpose. Libraries must perforce deal with many different platforms, which vary in many different ways. No platform provides all the features that libraries and users would ideally like to have, and features may change at short notice; all this adds to the complexity for both libraries and readers.

328. First, and obviously, the platforms provide access to different titles (which is why libraries have to purchase access to content on different platforms). But there is often considerable overlap between their contents: publishers release overlapping but not congruent sets of titles to different aggregators; and sometimes titles are accessible only on the publisher's platform. Hence a library will have a mix of titles some of which are accessible only on one platform, while others are accessible on several. Even worse, from a library and a user perspective, an aggregator's contract with a publisher may change, or come to an end, which may mean that titles disappear from the platform, or that the functionality associated with a particular publisher's titles is withdrawn.

329. Second, different platforms have different levels of DRMs which may affect, for example, the amount of downloading, or printing, or the number of simultaneous users. Publishers tend to have fewer DRM restrictions than aggregators, or even none at all.

330. Third, the features provided for users—and how they operate—can vary significantly. Some platforms provide full-text searching, and the ability to highlight and save search terms; some allow users to create a bookshelf where they can save the books they are interested in, and bookmarks and notes within books (which may or may not include facilities to download or print the notes); some have a citation facility which provides a one-click citation to a book or chapter (and there may be facilities to export citations and

references). But not all platforms provide all these kinds of features, and even when they do, they operate in different ways.

331. Fourth, libraries must consider the formats in which content is made accessible, from PDF to HTML to EPUB, and how content renders on a range of web browsers and on different mobile devices. There are also differences in the features to provide enhanced accessibility for readers who are partially-sighted, suffer from dyslexia and so on. Such variations have implications for how libraries organise their support for users.

332. Fifth, the administrative interfaces vary hugely along with the facilities that allow libraries to control authentication and authorisation methods; or to set loan periods, or change default landing pages, search settings and the like; or to ensure that the content is discoverable via the library catalogue or otherwise(such as tagging titles within web-based discovery services), and to configure link resolvers; or to get COUNTER-compliant usage data (along with the formats in which reports come).

333. All these variations make for potentially-daunting problems for libraries, and difficulties for users as they get access to content from different platforms. More standardisation of the facilities provided by aggregator and publisher platforms—for whole books and for individual chapters—would be very welcome to most users.

9.8 Conclusions

334. Demand, discovery and access for monographs are entwined in ways that are difficult to disentangle; and the relationship between them has been made more complex by the advent of digital publishing technologies and by the multiplicity of players involved in the supply chain. Achieving efficient workflows and interoperability between the systems of the different players has proved difficult. There is as a result frustration on all sides, and almost certainly some negative

effects in efforts to reach a variety of audiences, and to turn potential into effective demand.

335. The scope of the marketing and promotional activities of the array of wholesalers, distributors, library suppliers and booksellers have changed fundamentally as a result of the rise of Amazon; and the range of titles held by booksellers has considerably diminished. Whether or not this is one of the key factors underlying falling sales, particularly from individual purchasers, is not clear, though it cannot have helped. Nor is it clear that efforts to focus more on emerging markets are likely to bring significant change.

336. Demand from libraries is of course key to the market for academic books, and the widespread availability of large-scale aggregations of e-books, of the platforms to gain access to them, and of web-scale knowledge bases, have together brought great changes to the relationships between publishers, libraries and library suppliers:

- first, there has been a significant shift in library purchasing in favour of e-books;
- second, this brought pressures on revenues for both publishers and suppliers;
- third, new acquisition models, especially for e-books, have brought major changes in patterns of collection development across the library sector;
- fourth, frequent variations in the terms and conditions associated with those models have brought difficulties in judging what works best for the different parties
- fifth, some libraries are seeking to link collection development more closely to institutional strategies for teaching and learning and for research. Achieving this requires new skills from

librarians, not least in data analysis; but it seems unlikely that it will mean acquiring more books, whether print or digital.

337. Discoverability is of increasing importance in a world of information abundance. But the metadata generated under the ONIX standard is very different from MARC records. There is much to be done to increase the quality and range of metadata that accompanies books, and a need for metadata schemas that better reflect research that does not fit into traditional subject frameworks: providing information at more granular levels about the contents of books; about authors and other contributors; and about 'events' such as reviews and social media comments. All these could help to transform discovery, enabling potential readers, for example, to receive more useful alerts, and to undertake more effective searches.

338. But even with better metadata, publishers, booksellers and libraries need to invest more in learning about how different categories of readers and purchasers operate online,in meeting the scholarly needs of postgraduates and academics, and in improving search and navigation tools to maximise discoverability. Finally, variations in the features on publishers' and aggregators' platforms for access to e-books make for potentially-daunting problems for libraries, and difficulties for users too. More standardisation of the facilities provided by those platforms would be very welcome.

339. A key set of challenges, therefore, is to acknowledge that demand, sales, discoverability and access are closely intertwined and shared concerns of all the players from publishers to libraries and booksellers and the intermediaries between them; to clarify the relationships between them; and to identify ways of simplifying them. That will in turn involve dialogue with, and a greater understanding of, the behaviours and needs of, the research community itself. And there is almost certainly scope for working with people and organisations in other sectors who have gained a

deep understanding of user behaviours in the digital environment, and experience in user-centred design.

10. Open Access

10.1 Introduction

340. Open access (OA) and the benefits to be gained from it have become prevalent themes in the development of policies by governments and research funders across Europe (including the UK) and North America over the past decade. For the potential benefits to be gained from worldwide adoption of OA are indeed very attractive. Initial attention focused in the main on OA for articles in scholarly journals, where significant progress has been made; and hence it is not surprising that attention has more recently turned to OA for academic books.

341. It has also been widely recognised, however, that given the differences between books and journals (many of them referred to in earlier sections of this report), OA for books raises some different, arguably more complex, issues than it does for journals. It is thus notable that the Finch Group (Finch, 2012) explicitly excluded monographs from its recommendations; and among major research funders, only a few, including the Wellcome Trust and the NOW in the Netherlands require OA for books *and* provide dedicated funding to support the costs. Other funders which require OA for books include the European Research Council, although funding is available only for the duration of a specific research grant. But funders including the AHRC in the UK, the National Endowment for the Humanities in the USA, and the European Commission's Horizon 2020 programme take the stance of encouraging rather than requiring OA for books; and overall a growing number of funders provide funding support of some kind (see the useful list in Hole, 2016).

342. A key driver for the increasing adoption of OA in the UK has been the requirement announced by the Higher Education Funding Council for England (HEFCE) and the other UK funding bodies that articles and

similar outputs to be submitted to the next REF exercise now expected in 2021 should be made accessible on OA terms (for a full account of the policies on OA and the REF see HEFCE 2015 as updated). This requirement does not apply to monographs, although credit will be given (in a form yet to be determined) to institutions that can demonstrate progress on OA beyond the formal requirement for OA journal articles and conference proceedings, thus covering, for instance, research data and books. The Crossick Report (2015) was commissioned in order to inform the development of the funding bodies' policies. It recommended that funders should encourage moves towards OA for monographs, but also pointed to a number of challenges. Most recently, in December 2017, the Councils announced that they intended to move to an OA requirement for monographs in the exercise that is currently expected to take place in the mid-2020s. A consultation document (HEFCE, 2016) outlines some of the principles that are expected to underlie that requirement.

343. It would be otiose to repeat here the analysis and conclusions of the Crossick report. Rather, we highlight some of the key features of current OA discussions in the light of the evidence we have gathered through this project; and point to some significant recent developments. Among the latter in the UK are the publication in early 2016 of the report of the OAPEN-UK project (OAPEN, 2016); the development by Jisc of proposals (Jacobs, 2016) for future services to support moves towards OA for monographs; the establishment of a National Monographs Strategy Group (NMSG), supported also by Jisc, with a remit to address core challenges relating to the provision and support of scholarly monographs past, present and future (Jisc, 2016); and the decision to establish under the aegis of Universities UK's Open Access Co-ordination Group (Hastings, 2016) a Monographs Working Group, with a remit to

- monitor and evaluate progress towards OA;

- promote cultural change;
- advise on technical, legal and policy barriers; and
- promote innovation.

344. We trust that our findings and recommendations will be of use both to the NMSG and to the UUK Working Group.

10.2 Benefits and opportunities of OA

345. The principles underlying OA were first articulated for a wide range of audiences in the Budapest (2002), Bethesda (2003) and Berlin Declarations (2003); and the potential benefits have been well enunciated and summarised by Suber (2012), Crossick and many others (Eve, 2016). They include

- speedier dissemination and a wider reach for research findings
- enhanced public understanding of and engagement with research
- enhanced transparency, openness, and accountability
- closer linkages between research and innovation, and opportunities for economic growth driven by research
- improved efficiency in the research process itself
- increased returns on the investments made in research, especially when those come from public funds.

346. Such benefits are indeed attractive, and as Finch (2012) notes, the principle that publicly-funded research should be freely accessible in the public domain is compelling, and fundamentally unanswerable. Nevertheless, we endorse Crossick's view that there is a need for a much clearer articulation–and promotion to the research community–of the potential benefits of OA for monographs, including enhanced levels of use in teaching and learning at both

undergraduate and postgraduate levels. For as Suber (2012) points out, most academics have many other preoccupations, and even when they express support for OA in general terms, many of them, in the arts and humanities especially, are unfamiliar with some of the basic concepts and terminology; and that is a bar to adoption, and thus to securing the benefits. Nonetheless, as the number of monographs accessible as e-books has continued to increase even since Crossick reported in 2015, it is difficult to disagree with his conclusion that funders and policy-makers will seek to widen the reach of those benefits by extending OA policies to books; that is indeed evident from the recent HEFCE consultation.

347. As we have noted at several points in this report, however, academics as both authors and readers show a strong preference for physical print as distinct from e-books. And in articulating the potential for OA, it is critically important to distinguish between the benefits (as well as the disadvantages) of e-books on the one hand and OA on the other. One of the potential benefits of e-books is that a transition to OA cannot take place unless the great majority of books are made accessible and usable online. Nonetheless, as should be clear from the experience of recent years, it is perfectly possible to publish and disseminate e-books online without making them accessible on OA terms. Digital online provision carries no *necessary* implication of OA. Moreover, it is important also to acknowledge the challenges to be overcome before OA can make similar headway for books as it has already for articles in scholarly journals; and to recognise that even for journals, OA has a very considerable way to go before it becomes the norm, even for authors in the countries responsible for the greatest share of articles published each year.

10.3 Kinds of OA

348. OA presents real opportunities for the remodelling of scholarly communications, and at present it comes in a number of different

forms. The typology of OA is built around two models that have been applied to journal articles, although the terminology and the ramifications can be complex.

349. First, the Gold OA model applies to articles that are made fully accessible and usable free of charge on a journal's platform immediately on publication. The journals that apply this model themselves fall into three categories:

- those where all the articles are OA in this way, and where the costs are met by charging a fee (an Article Processing or Publishing Charge (APC)) before publication;
- those where all the articles are OA, but which meet their costs in other ways, through grants, subventions and voluntary efforts; and
- those—termed hybrid journals—where some of the articles are made OA because a fee has been paid, but others remain behind a subscription wall because a fee has not been paid.

350. Second, under the Green OA model articles are published in subscription-based or hybrid journals in the normal way, but a version of the article is deposited in an OA repository and made accessible OA after an embargo period which may range typically up to 24 months. The version deposited is usually what is termed (somewhat quaintly) an accepted manuscript: that is, the version which has been accepted by the journal for publication, but may not have been finally copy-edited and formatted for publication, when it becomes what is termed the version of record. Only very rarely to date has this model been used for academic books.

351. A second set of terms, in addition to Gold and Green, is also sometimes used to distinguish different types of OA: libre OA to denote that the article or other output is available for re-use without restriction; and gratis OA to denote that while access is provided free

of charge, restrictions remain on use and re-use. In very broad terms, many but by no means all articles in Gold OA journals come under the libre model; but some publishers allow or require some restrictions on usage. And for articles made OA under the Green model (as well as those published in subscription-based journals) a range of uncertainties and restrictions surround their use.

352. In the UK, and again in very broad terms, the Research Councils, the Wellcome Trust, and most of the major research charities have policies to support Gold OA; and they provide to universities earmarked funds to meet the costs of APCs and other costs relating to OA. In return, where an APC is paid, they require the removal of any restrictions on usage, normally through the use of a Creative Commons CCBY licence (see below). HEFCE and the other university funding councils, on the other hand, do not provide earmarked funds to support APCs and other costs of OA, though individual universities may use for that purpose the block grant that each of them receives, along with other resources at their disposal. But the funding councils now require that any journal article or similar publication submitted for assessment in the next REF exercise should be deposited in an OA repository, and that it should be made freely accessible within an embargo period limited, for the arts and humanities, to 24 months. Individual universities have in many cases adopted their own policies; and the policies of research funders in Europe, North America and other parts of the world vary yet again. These differences in policy, as the OAPEN UK report makes clear, will exacerbate the difficulties for authors, publishers, universities and other research institutions if and when funders seek to extend their OA policies to books.

10.4 Challenges

353. Survey evidence shows that nearly half of academics in the arts, humanities, and social sciences in the UK express positive attitudes

towards the principle of OA, though there is a sharp difference between senior and junior researchers: PhD candidates express enthusiasm at twice the rate of professors. But well over half the respondents think that implementing OA for books is going to be difficult or very difficult (OAPEN UK, 2014). Moreover, academic authors have certainly not yet voted with their feet: OA books represent as yet a tiny proportion of the titles published by UK, other European, and North American academics each year.

354. A first set of issues relates to costs. For OA books under the Gold model, Book Processing Charges (BPCs) are of course significantly higher on average than APCs for journal articles. In an environment where funding is tight, meeting the costs of OA is thus a challenge for universities and for funders. Moreover, as the Finch Report discussed at length (2012) while it might possibly be the case that if OA were fully adopted across the world, publication costs would be no higher—and possibly significantly lower—than the current costs of purchasing books and journals, during any transition to OA, paying APCs and BPCs represents an additional cost on top of purchasing content published under traditional models. Knochelmann (2016) makes a similar point by applying the 'prisoner's dilemma' to OA book publishing. Nevertheless, as with OA for journals, there may be benefits to be gained by exposing authors to the costs of the services that publishers provide; and encouraging them to consider whether those services represent good value, or whether a different package of services might be appropriate.

355. At present, the BPCs charged by established publishers vary significantly: Cambridge University Press, for example, charges £6,500, while Edinburgh University Press and Taylor & Francis both charge £10,000, Palgrave £11,000. These charges are considerably lower than the average costs of publishing per title incurred by American university presses (Maron et al, 2016) we noted in Section.2.3. The work of a task force on scholarly communication set

up by the Association of Research Libraries (ARL), the Association of American Universities (AAU) and the Association of American University Presses (AAUP)—and a series of related Mellon-funded projects (Maxwell, 2016)—have also brought a sharper focus on publishing economics. A common theme has been the possibility of funding university presses via subventions to authors; but an implication of the high costs shown for American university presses is that subventions would have to be at a much higher rate than the BPCs currently being charged in the UK

356. UK publishers themselves acknowledge that there are difficulties in setting BPCs at appropriate levels, especially if they are seeking to recover some of the costs of publication through the sale of print or other versions; hence current levels of BPCs are kept under review (Collins et al, 2016). Newer start-ups charge somewhat lower fees than the established presses: Ubiquity Press, for example, currently has a basic BPC of £3,780 for a book of 100,000 words, rising to £5,920 if copy editing and indexing is included in the service; and it provides detailed information about its costs (Hole, 2016). UCL Press charges authors outside UCL £5,000 for books of up to 100,000 words. Open Book Publishers suggests (Authors' Guide, n.d.) that it costs c£3,500 to publish each title, though it does not charge an APC, relying instead on authors to bring what ever grants they can secure, and on print and other sales to meet the remainder of their costs. Some publishers, however, report that revenues from sales of books that are available OA on the web have been disappointing.

357. Although some funders provide support towards the costs of OA books, for the arts and humanities funding pressures are more acute than in some other subject areas, since only a small proportion of research is funded from project grants. Moreover, where research project funding *is* provided, for long-term book projects it often takes the form of a succession small grants from a variety of sources and over a number of years. In such cases, multiple funders may feel little

sense of ownership and may face practical difficulties in meeting requests for further support for books published many years after their grants came to an end. Meeting the costs of BPCs thus under current regimes in the UK falls largely on individual universities and research institutions, and despite any potential for cost savings sector-wide if OA were to become a bigger part of the books landscape, individual universities could face invidious decisions about which books to fund. In order to make Gold OA funded by BPCs operate effectively over a wide range of publications, and to maximise the potential savings, some changes in funding regimes would be essential.

358. A second set of challenges relates to authors' ability, typically conceived of as their right, to choose where and how to publish their books. Most academics attach great importance to this right, which underlies, but is also in tension with, the concerns expressed by many of them that they find it difficult to get their books published (Collins et al, 2016).While some authors remain with the same publisher for several books, others change publisher for a variety of reasons. But rightly or wrongly, and whatever might be said in the formal rules for the REF (where Panel D stated in 2012, for example, (REF 2014) that in assessing outputs, it would not privilege 'the perceived standing of the publisher or the medium of publication') or indeed in similar exercises, perceptions of brand reputation are of paramount importance, alongside the quality of services provided by different presses. Authors typically want to publish their work with high-status publishers to secure the credit that accrues to them through such publication. This does not of course present a problem for the OA books published so far in small numbers by well-established presses; but for so long as OA is perceived as an option provided in the main by small start-up publishers, it remains (rightly or wrongly) a significant barrier to widespread adoption.

359. A third set of challenges relates to rights regimes. For the OA movement in general, removing so far as possible the restrictions on usage associated with copyright is of fundamental importance. The Research Councils and many other funders in the UK and the rest of the world have adopted the Creative Commons CCBY licence as the most effective way to achieve this. Under that licence, the only restriction on the use of content is that the source must be named and attributed to the author. That restriction is one of the moral rights embedded in conventional copyright regimes, and in line, of course, with the norms of the academy worldwide. But many scholars in the arts and humanities also stress the importance of the precise forms in which they present their work; and are thus concerned about loss of control over the use of their work if a CCBY licence is used, and the risks of users compromising the integrity of their writing, or modifying it in ways that authors would find unacceptable (Wellcome Trust, 2013).

360. Evidence of such malpractice is hard to find, and it may well be limited by the norms and practices of the academy. Nevertheless, the concerns remain, and they are felt particularly strongly in the arts and humanities, and for books, where authors' sense of ownership is particularly strong.

361. There is related—and often particularly strong—unease about commercial exploitation and the creation of unauthorised derivative works. These can be addressed to some extent by the NC ('non-commercial) and ND (no derivatives) clauses that can be added to the CC BY licence. But there is debate around the practicalities and the use of these clauses (see, for example, Crossick pp. 44-45); and they do not meet the requirements of those funders who require no restrictions on use other than attribution.

362. Few of the established publishers, large or small, currently use the CC BY licence for any OA books they publish. Cambridge University

Press, for example, uses the CC BY NC licence, but also allows other licences including CC BY NC ND (the most restrictive of all CC licences); Taylor & Francis uses its own OA licence which is based on CC BY NC ND. However, the CC BY licence is now used by Palgrave as well as Open Book Publishers and Ubiquity Press, and it has become slightly more common since Crossick reported in early 2015. Of the 5658 titles in all subjects currently (as at 23. January 2017) recorded in the Directory of Open Access Books (DOAB), 890 (16%) use that licence, though very few of them are in the arts and humanities. Overall CC BY NC ND remains by far the most popular licence, used by three-quarters of the books listed; and this reflects authors' preferences (Collins et al, 2016).

363. A fourth and related set of issues arises from commercial issues of two kinds. First, established publishers including university presses and learned societies are for the most part cautious at best in their attitudes towards OA. They operate a business model under which books that turn out to be successful in sales terms offset the losses from those that are less successful. Under the OA model, cross-subsidisation of that kind becomes much more difficult, except to the extent that publishers can secure revenues from the sale of print and other non-OA versions of a successful title. The use of the NC clause in CC licences in part reflects a concern to protect the potential for such revenues. Second, while as we have noted at several points the key aim for the great majority of academics is to maximise the reach and the audience for their books, royalties can make a welcome, and sometimes substantial, addition to their income, on top of the salaries they receive as university employees. For most academic books the amounts are relatively trivial, and of *much* less concern to authors than the scholarly credit they can achieve through publication. But those titles—often major works of scholarship—that are written and published as trade books, royalties can, if the book is successful, reach considerable sums. Moreover, on occasion (though

publishers suggest not as often now as in the past), books on academic lists achieve—for a variety of reasons that are not predicted or well understood—unexpected levels of revenues from retail sales. It is important also to note the range of novels, plays, poetry and so on produced by authors who work in the HE sector in the now vibrant areas of creative writing, drama and so on, where the normal expectation is that such publications should attract royalties (Greenberg et al, 2016). In all these cases, the potential benefits of OA sit alongside the threat of income foregone for authors or publishers or both. And while green OA, with the use of an embargo (see below), might reduce the losses, it would far from eliminate them, since backlist sales are such an important source of revenue.

364. A fifth set of issues relates to third party rights. As we have noted in Section 7.3, acquiring rights to include text extracts, illustrations and other material from other published or unpublished sources has become increasingly complex and difficult, and recent changes to copyright law in the UK and elsewhere have brought little effective relief. But there are particular problems relating to OA books. For non-OA books—print and digital—reproduction fees are typically set according to the number of copies produced and sold; and the licences are usually time-limited. But since OA books can be copied freely and without restriction of time, the notion of individual copies and of time limits becomes problematic. Moreover, there are reports that rights-holders are resistant to providing licences for reproduction in OA works, particularly if they make use of a CC BY licence (Wellcome Trust, 2013). These difficulties threaten to reduce, if not eliminate, some of the key benefits of digital books, with their potential for including and/or linking to a wide range of multimedia content that could bring huge advantages in disciplines such as music, dance, drama and other performing arts, as well as history, literature, and so on.

365. A sixth set of issues relates to the workflows and processes of publishers, libraries and other intermediaries. These have changed, and are changing, rapidly as we have set out in Sections 2, 3 and 4. But established publishers have as yet hardly begun to adapt to the challenges presented by OA books, which for most of them are still but a very small part of their business, and handled ad hoc. At current levels of demand from authors for OA, there is no incentive for most publishers to innovate. Those who participated in the OAPEN UK experiment learned a number of useful lessons from the experience, a key one of which is the need for collaborative working with all stakeholders (Jones, 2015). But for most publishers there is no incentive at present for any wholesale change in content management and other publishing systems to handle OA books more efficiently and effectively; and any such change would in any case take considerable time and resources (Knochelmann, 2016).

366. Moreover, while the new start-up publishers have the advantage that they can design their systems and processes from scratch, they are still hampered by a supply chain that is not well-adapted to handle OA books. As we have argued in Section 9, discoverability, demand and access are intimately related to each other. But current metadata, discovery, distribution, sales and access systems tend to conceal rather than promote the existence of OA books. We thus face the paradox that while one of the key motivations for OA is to promote wider dissemination, usage and impact, current systems make it harder to achieve those aims for OA books than for many conventional publications. Figures for views and downloads are often impressive; but there is no doubt that the impact of many OA books is more limited than it otherwise would have been. We thus welcome the moves that Jisc is making in the UK, along with others such as the OAPEN project in the Netherlands, to provide service support and to encourage the publication of OA monographs (Jisc, 2016). But a key conclusion must be that neither publishers nor

funders nor institutions and their libraries can achieve the full benefits of OA on their own; the whole gamut of intermediaries to which we have referred throughout this report have key roles to play.

367. A seventh and final set of challenges arises from the international nature both of research and publication. Even if they were to act collectively, the key sets of stakeholders in the UK cannot achieve the kind of change that many seek through the implementation of OA unless they take full account of that global context. That is especially the case in the UK, where academic authors publish with a range of publishers in Europe and North America, and sometimes in foreign languages; where there are significant levels of movement in the academic community both into and out of the UK (though whether this will survive Brexit is not clear); where overseas authors publish with UK publishers; and where both academics and libraries need access to books published overseas. Particularly since the publication of the Finch Report in 2012, the UK has taken a leading position globally in promoting OA for journal articles; and as we shall see below, a number of important initiatives relating to OA books are based in the UK. The current global picture for OA books, however, is perhaps even more complex than for journals, partly because of the challenges we have outlined above; and there are concerns in the global south about the economic feasibility of OA books and access to funds to meet the costs (Kitchen, 2016). Funders and policy makers will need to consider carefully the implications for UK research and publishing, set in this international context, before determining their stance and their policies in promoting OA for books. As the OAPEN UK final report argues 'it will be important not to get too far ahead—or too far behind—developments in other countries'.

10.5 Current OA book initiatives

368. Publishing OA books in any significant numbers started some 10-12 years ago. The Australian National University (ANU) E Press (now the ANU Press) founded in 2003 was one of the key pioneers. It has now published over 600 OA titles. All books are peer reviewed, and are made available for sale by print on demand. ANU Press's success has spawned the creation of new presses at other Australian universities such as Monash and Adelaide, to sit alongside the more established university presses at Melbourne, Queensland and Western Australia. European university presses with a significant record of OA books include Amsterdam and Göttingen.

369. As we have noted in Section 2., established university presses in the UK have made more tentative steps, but the last two years have seen the creation of a number of new university presses—UCL Press most prominent among them—which are explicitly committed to OA publishing. Even more recent in the UK is the development of the library publishing programmes we noted in Section 3. Like the similar programmes developed in other countries, particularly the USA, they almost invariably have close relationships with individual academics and departments, and a commitment to OA educational and scholarly resources produced within the host university.

370. There are other more long-standing OA book publishers in the UK, however, of which the most prominent is Open Book Publishers, founded in 2008 and now with a list of some 85 titles. It works in partnership with a number of university research institutes and projects, and seeks to recover some of its costs through the sale of print and other copies. It has a library membership scheme under which members get discounts on any print copies they purchase, along with the ability to download MARC records for all OBP titles. The Open Humanities Press, founded in 2006, publishes book series based around its radical OA philosophy. More recent start-ups

include Ubiquity Press, whose transparent business model has been mentioned above, and which provides the platform for other publishers including the newly-established UCL Press; the Open Library of the Humanities, which for the present appears to be focusing on journals rather than books; and the Humanities Digital Library, an initiative of the University of London's School of Advanced Study, which provides a publishing platform for scholarly books (and which will be the platform for the Royal Historical Society's *New Historical Perspectives* book series).

371. In the US, the trend towards closer relationships between university presses and libraries (including the latter's publishing programmes) brings with it inevitable discussions about OA for books. Public statements from the library community and some academics and administrators express what is presented as a widespread belief—stimulated in part by the Mellon Foundation's Monograph Initiative and the projects it has funded, along with the work of the task force on scholarly communications of the AAU, ARL, and AAUP—that a transition to OA is in some senses inevitable and inexorable. The truth of that belief is not yet clear: many university presses have yet to make any steps towards OA, and among those that have, the progress so far in publishing OA monographs is at best mixed.

372. Considerable interest has been generated, however, by the Luminos initiative of the University of California Press, launched in 2015. Authors of books to be published by Luminos provide a fee of $7500, with a similar sum added in the form of subsidy from UC Press, and from library membership fees. Publishing is based on an open source content management system funded by the Mellon Foundation, which is being made available to other presses. A second recent initiative has been the establishment of the Lever Press as a collaborative initiative by the University of Michigan, Amhurst College, and the Oberlin Group of liberal arts colleges (which unlike Michigan, do not have their own presses). Its promise is to 'create a

new, peer-reviewed, OA, digital-first pathway for scholarship in the arts, humanities, and social sciences'. It does not plan to charge BPCs, since it takes the view that to do so would perpetuate current inequities between well-resourced and poorly-resourced institutions. The partner institutions have committed over $1million to the initiative over the next five years, and the hope is that institutions generally, along with their libraries, will increasingly move to support OA rather than existing publishing models. The plan is to publish 60 titles by 2020. And more recently the Mellon Foundation has launched an initiative based at Emory University to support long-form OA publications in the humanities.

373. There are also important developments in the establishment of platforms and services for OA books, in addition to those provided from its UK base by Ubiquity Press mentioned above. Project MUSE, based at Johns Hopkins University, announced in July 2016 that it is developing, with financial support from the Mellon Foundation an OA platform—MUSE Open—for monographs in the humanities and social sciences, which publishers will be able to make use of for a one-time fee; it will also aim to provide new kinds of features for both authors and readers to support digital humanities scholarship (Schonfeld, 2016). And in the meantime, JSTOR has begun making available OA monographs from four university presses in the US and the UK.

374. In Europe, OpenEdition is based at the Centre for Open Electronic Publishing supported by leading French research institutions, and provides a digital publishing infrastructure for research in the humanities and social sciences, with the primary objective of promoting OA publishing. It currently has over three thousand titles, though not all of them are OA. The OAPEN Foundation is based at the Koninklijke Bibliotheek (KB) in the Netherlands, with close involvement from Dutch university libraries, and aims to provide a dedicated infrastructure for those engaged with OA books. Its OAPEN

Library, which makes use of the University of Amsterdam's repository infrastructure, works with publishers to build a quality-controlled collection of OA books, mainly in the humanities and social sciences. It currently includes over 2,500 books from more than 100 publishers, provides metadata feeds in various formats for libraries, and also works with the main library suppliers such as ProQuest and EBSCO. Preservation services are provided by the KB. OAPEN also provides the DOAB service we have referred to, with the aim of improving discoverability for OA books; and it is a key partner—along with OpenEdition, Open Book Publishers, Open Library of the Humanities, Ubiquity Press and similar initiatives from seven countries—in the EU-funded 'Open access Publications in European Research Areas for Social Sciences and Humanities' (Operas) project. OAPEN's goal is to become fully sustainable by 2019 as a service provider for OA books, their publishers, funders, and libraries. The strategy depends on the speed of the transition to OA books, and OAPEN recognizes the need to increase its customer base.

375. Knowledge Unlatched (KU) operates as a global library/publisher partnership under which curated collections of titles selected by a collection committee are created, and libraries across the world are invited to choose packages and titles to which they pledge support. Once enough pledges are received, publishers receive a fee, and the titles are 'unlatched' and made freely accessible to any reader (not just members of the pledging libraries) anywhere in the world, via the OAPEN platform and the HathiTrust Digital Library. KU 'unlatched' 28 new humanities and social science titles from 13 scholarly publishers in 2014, with pledging libraries paying less than $43 for each title. It has grown significantly since then. The latest pledging round covers 343 titles—selected from 681 submissions from 54 commercial, non-commercial and university presses (147 front list titles being published between November 2016 and April

2017 and 196 backlist titles published since 2005).The pledge sought from each library for the full collection is $10,780, an average of $31 per book. The model of pooling global resources to open up access to both new and back-list titles has thus proved attractive to libraries across the world, although KU acknowledges that the process is challenging to co-ordinate and scale.

10.6 Business models

376. It should be clear from the discussion above that the various initiatives to support OA books are resourced and funded in a variety of ways, by a wide range of publishers and other organisations, some of which operate as consortia, while some provide infrastructure and services to other organisations. BPCs are far from the only way to support the publication of OA books; the mixed economy that Crossick forecast and supported continues to develop apace, with diverse experimentation its key feature. Any attempt at a taxonomy is fraught with complexity, and that provided in Annex 4 of the Crossick report is too schematic to point a way forward. It has rapidly been overtaken by events. The OAPEN UK report therefore takes the view that it is more useful to point to key features that should be taken into account in developing a business model for OA books, including such matters as protecting the core elements of publishing that are important to academics, taking proper account of existing systems, platforms and services, regularly reviewing progress and adapting to changed circumstances, and so on. The checklist is a valuable resource, and we particularly support its emphasis on dialogue and collaboration with other stakeholders. Nevertheless, it would be wrong to over-emphasise the importance of any particular feature, and there is no guarantee that use of the checklist will bring success. As Crossick and many others have pointed out, the diversity of funding regimes, of scholarship in the arts and humanities, and of the kinds of books scholars want to produce, means that no one model will address all issues and

problems. It is inevitable that while some initiatives will are likely to succeed—some in specific niches—others will fade away.

10.7 Green OA

377. The possibility of promoting OA for books by making them accessible via repositories (Green OA) has been little discussed: it was not mentioned, for example, in the OAPEN UK final report. Since then, however, a round table convened by Jisc and OAPEN (2016) has examined issues and options, and identified three possibilities (one a straw man, a second a mixed Gold/Green model, and the third a model based on publishing entirely via a repository or similar platform). It is proposed that these models should be considered further by the UUK Monographs Working Group to which we have referred and which started work in February 2017. In the meantime, however, the funding councils' consultation on OA for monographs in the REF exercise in the mid-2020s clearly envisages access via repositories as a key mechanism (HEFCE, 2016).

378. But Green OA for books is not unproblematic, since the great majority of traditional publishers—for fear that their business models would otherwise be put at risk—allow only an accepted manuscript to be posted in a repository; and final published versions are therefore not made accessible. Book manuscripts—much more than journal articles—can change dramatically, however, after they have been submitted to the publisher, during an editing and fact-checking process that can be protracted. Hence the Green OA and the published version may differ very significantly, but without all readers being aware of the differences between them (Reeve, 2016; Eve, 2014) The funding councils recognise this in their consultation, which states as a principle that 'as far as is practicable, the version that is made OA should be 'academically equivalent to the final published version of record'. How this is to be achieved is not clear;

but unless it is, there would be major implications for scholarly practice.

10.8 Speed and scalability

379. A recent report (Simba, 2016) suggests that the next four years might see growth of 30% annually in revenues from OA books, or a near four-fold increase over that period. That looks dramatic, but the increase would come from a very low base. The 5.5k titles currently listed in the DOAB represent 1.5% of the350k backlist academic and scholarly titles reported in a survey of a selection of just 171 publishers worldwide in 2009, a figure that was undoubtedly a significant underestimate, and will have increased in the past seven years (Cox, L, 2010). One estimate from a sympathetic publisher is that perhaps up to 100 OA monographs are published annually by UK authors. That represents but a small fraction of the titles currently published annually by a single medium-sized academic publisher. And moving too fast in seeking to overcome the cultural, behavioural, economic, practical and policy challenges we have outlined would bring risks. The OAPEN UK final report (2016) concludes that moving too fast may risk losing some of the existing strengths of monograph publishing and of asking organisations to perform roles that they have not yet considered, let alone prepared for.

380. The conclusion that therefore ‘change must happen slowly’ may be too cautious for some: there will be differing views about what constitutes change that is ‘too fast’ and about the risks involved. But the report’s emphasis in its ‘guiding principles’ on the need for dialogue, for collaboration across different stakeholder groups, for care in decision-making, and for rigorous evaluation to avoid unintended consequences is surely right.

10.9 Conclusions

381. OA for books has the potential to bring real benefits in widening the reach and the impact of academic books: making scholarly communications work more effectively in the interests of academics both as authors and readers, of funders and of the wider public. Funders are becoming more interested in OA for books—while recognising the differences between them and journals—as more titles are published as e-books; and this trend will continue. There is also a strong momentum behind some of the current initiatives promoting a transition to OA. But most funders in the UK and across the world are proceeding cautiously, aware of the complexities and challenges that have prevented a more pronounced move towards OA for books to date, including costs, authors' behaviours and attitudes, rights regimes for authors and difficulties with third party rights, practical and process problems, and the need to take account of international developments. These and other issues will no doubt be highlighted in responses to the UK funding councils' consultation on OA for books in the next-but-one REF.

382. None of the barriers is insurmountable, and the vibrant and highly varied set of initiatives in the UK and overseas are together exploring the possibilities, and opening up new opportunities for authors. They have lofty ambitions, and although they operate at small scale as yet, some show significant promise. Some such as Knowledge Unlatched (KU) have grown more rapidly than others, and it seems clear that the numbers of OA books will grow over the next few years from the current low base; but scalability will itself present a number of challenges. Active dialogue and engagement across all stakeholder groups, including the projects and start-ups, is essential if we are to move forward effectively. We therefore endorse the OAPEN UK project's recommendations to stimulate some quick wins as well as longer term goals; and the need for dialogue, collaboration, informed decision-making, and rigorous evaluation of change.

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