## Policy requirements

<table>
<thead>
<tr>
<th>Policy</th>
<th>Journal articles / published conference papers</th>
<th>Monographs</th>
</tr>
</thead>
<tbody>
<tr>
<td>RCUK (£2.3bn p.a.)</td>
<td>Immediate Gold OA, under CC-BY, APC paid, or Embargoed Green OA</td>
<td>No requirement, but encouragement and active consideration</td>
</tr>
<tr>
<td>Wellcome Trust (£700m p.a.)</td>
<td>Immediate Gold OA, under CC-BY, APC paid, or Embargoed Green OA</td>
<td>Immediate Gold OA, under CC-BY-NC/D, BPC paid, or Embargoed Green OA</td>
</tr>
<tr>
<td>REF (1.6bn p.a.)</td>
<td>Deposit at acceptance Discoverable by publication OA within ~RCUK embargo limits</td>
<td>No requirement this time, but active consideration for future</td>
</tr>
<tr>
<td>EC Horizon 2020 (£67bn over six years)</td>
<td>Deposit by publication Immediate Gold OA, APC paid, or Embargoed Green OA</td>
<td>No requirement this time, but encouragement Funding for FP7</td>
</tr>
</tbody>
</table>

**Funding for FP7**
Jisc Monitor: 2 separate but integrated services

• Monitor Local:
  • Institutions can record and report data relating to their OA publications
  • Institutions can record and report on their APCs
  • Hosted in the cloud for security

• Monitor UK:
  • Shared application aggregating and presenting data analytics
  • Institutions and funders can evaluate cost and compliance data
How Jisc’s open access services support the publication lifecycle

Explore the areas to find out more

Research publication lifecycle

Jisc services

Click here for a thematic view of Jisc’s open access services
How Jisc’s open access services support the publication lifecycle

Explore the areas to find out more

- Submission
  - Select Journal
  - Check Compliance
- Acceptance
  - Manage costs
  - Deposit in repository
- Publication
  - Report on compliance
  - Maximise impact
- Use
  - Record impact
  - Report

Jisc services

Research publication lifecycle

Monitor local R&D: Alpha
Will enable institutions to record and report on data relating to the publication of open access outputs by their academics, including both ‘gold’ and ‘green’ publication routes.
Read More >>

The Connection: Collect and manage administrative data about OA.

Guidance, consultancy, technical support, and OA good practice
How Jisc’s open access services support the publication lifecycle
Explore the areas to find out more

Report on Compliance

Reliable and comprehensive management information about OA articles gives librarians and research managers the opportunity to monitor and prove compliance with funders’ OA policies and manage expenditure.

Click here for a thematic view of Jisc’s open access services
How Monitor local connects with OA systems

- Sherpa RoMEO (Jisc) - Policies
- KB+ (Jisc) - Journals
- CORE (Jisc) - Publication metadata/compliance
- Lantern/OA Gauge (3rd party) - Compliance
- CrossRef (3rd party) - Bibliographic metadata

Monitor Local

- Publication metadata, APCs, Compliance
- Publication metadata, APCs,
Monitor Local: the benefits

- UK specific focus
- Automation of data collection and validation wherever possible
  - Publication record enhancement and compliance checking
- Compliant with open standards for data exchange and exploit data from global and UK services such as
  - CORE, CrossRef, “How Open Is It?”, KB+, & SHERPA
Monitor Local: Alpha Release
### Academic Output: People

<table>
<thead>
<tr>
<th>Title</th>
<th>Firstname</th>
<th>Surname</th>
<th>Role</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ms</td>
<td>Kelly</td>
<td>Dickson</td>
<td>Corresponding Author</td>
<td>Del</td>
</tr>
</tbody>
</table>

**Workflow**

Save  Cancel
### Academic Output: Laboratory adverse events and discontinuation of therapy according to CD4 count at the start of antiretroviral therapy

#### £ Committed Costs

<table>
<thead>
<tr>
<th>Category</th>
<th>Curr</th>
<th>Gross</th>
<th>Gross GBP</th>
<th>Tax</th>
<th>Net</th>
<th>Budget</th>
<th>Awards</th>
<th>Pre-pay</th>
<th>Estimated</th>
</tr>
</thead>
<tbody>
<tr>
<td>Basic APC Cost</td>
<td>GBP</td>
<td>100.00</td>
<td>100.00</td>
<td>10.00</td>
<td>90.00</td>
<td>PCD 181016</td>
<td>BB/J009709/1</td>
<td>Fund:14432</td>
<td>Yes</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td></td>
<td>100.00</td>
<td>100.00</td>
<td>10.00</td>
<td>90.00</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

#### £ Actual Costs

<table>
<thead>
<tr>
<th>Category</th>
<th>Curr</th>
<th>Gross</th>
<th>Gross GBP</th>
<th>Tax</th>
<th>Net</th>
<th>Budget</th>
</tr>
</thead>
<tbody>
<tr>
<td>GBP</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td></td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td></td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td></td>
</tr>
</tbody>
</table>
Local will check compliance with RCUK and COAF funder policies. The Compliance tab will show what the requirements are, and (if the relevant information has been captured or recorded for the publication) whether the publication meets those requirements or not. This will include:

* Correct licence applied
* Correct embargo applied
* Deposited in a repository (where this is required)
* Acknowledgement of funder included in publication
* Statement about research materials included in publication
How Jisc’s open access services support the publication lifecycle

Explore the areas to find out more

- **Submission**
  - Select Journal
  - Check Compliance

- **Acceptance**
  - Manage costs
  - Deposit in repository

- **Publication**
  - Report on compliance
  - Maximise impact

- **Use**
  - Record impact
  - Report

Research publication lifecycle

Jisc services

**MONITOR UK** R&D:Alpha
Enables institutions and funders to evaluate UK cost and compliance data relating to ‘gold’ OA articles.

**Read More >>**

The Connection: OA charges paid to journals

- Guidance, consultancy, technical support, and OA good practice
How Jisc’s open access services support the publication lifecycle
Explore the areas to find out more

Manage Costs
Monitoring OA charges (APCs) paid to publishers to make articles OA via the ‘gold’ route is vital to institutional efficiency; whilst taking advantage of centralised negotiations with publishers helps institutions to save money and improve compliance.

Click here for a thematic view of Jisc’s open access services
Monitor UK is an APC aggregator, which will show how much publishers are charging for APCs and how much institutions are paying. This can directly inform future negotiations.
Monitor UK: the benefits

The benefits will be of interest in a number of contexts:

- Institutions
- Jisc Collections
- Funders