Open Access update

Issue 3: October 2016 “Open Access Week”

Key developments
Since the last digest in July, we have been focused on moving three projects into live service: publications router, Monitor Local and Monitor UK. Among them, they will reduce much of the administrative burden of OA for universities, though there is much work still to be done. With some of the core infrastructure services getting into shape, we are now looking at value-added services, such as OA dashboards and the potential of text-mining services over the CORE collection of OA material. It is early days, and we will let you know progress via our blog and this digest.

More widely, the Universities UK and RCUK groups we mentioned in the last digest are still getting established. The Jisc negotiations with Elsevier have OA as one key element, though the outcome remains uncertain at the time of writing. With our Danish, Dutch, Finnish and German partners in Knowledge Exchange, we have just commissioned a study of how exactly APCs get paid, including the large numbers that go nowhere near a central university fund. Regardless of how they get paid, there is an emerging consensus that we need some agreement on what they pay for. Not only is that the topic of one of the new UUK groups, but the Wellcome Trust and the large number of articles published in 2016, with 67% of institutions have already released a report on services and support for monograph publishing – see our blog for more details.

Policy compliance
Helping you to meet and demonstrate compliance with the range of different funders’ and publishers’ requirements

» SHERPA REF (a decision support tool to indicate eligibility under the REF OA policy) is now live in beta. Work is continuing on a major programme to rebuild the SHERPA services’ technical infrastructure for public release in 2017.

» Publications router is serving a growing list of institutions since going live as an official Jisc service in early August. Approximately 15 institutions are involved – either receiving feeds into their live repositories or into a test environment. Those using it in earnest are listed publicly on the publications router website. The same is true of the publishers and other content providers who are supplying input. These have now been joined by Springer Nature, whose feeds are fully active. These consist of papers across their portfolio that have been ‘flipped’ to OA under the Springer Compact agreement, together with papers from BioMed Central and SpringerOpen journals. Two other publishers are also close. Publications router currently supplies feeds to the Eprints platform without a plug-in. We’ve identified ways in which they can be improved further and will be working on those over coming weeks. Work continues on extending the service to additional platforms.

Cost management
Support with improving your processes and systems; and providing shared services, in order to save costs

» Monitor Local and Monitor UK: Details over the release of both services will be issued during OA week. Local is an on-site hosted software application which will enable institutions to record and report on funder and HEFCE compliance and cost data relating to the publication of open access outputs by their academics. UK will offer an off-site aggregator for APC expenditures across the UK’s higher education institutions. This service will also aid Jisc Collections in its on-going negotiations with publishers to get the best deals for institutions. We are currently working with early adopters of the services, but we would welcome any additional institutions who are interested in one or both Monitor entities: oamonitor@jisc.ac.uk

» Springer Compact: Nine months have passed since the start of the offsetting agreement, and we have seen a 128% increase in the number of articles being made OA compared to the total number of OA articles in 2015. 96% of institutions have already published OA articles equivalent to their total 2014 APC spend. When looking at the countries that are part of the Springer Compact agreement and that make their data openly available through the OpenAPC initiative, the UK has the highest number of articles published in 2016, with 67%. We have released a new blog with the results, and the 91

To find out more about our OA services email oasupport@jisc.ac.uk or visit our website jisc.ac.uk/content/open-access
participating institutions will receive a report evaluating the first agreement in January 2017.

Discovery, usage and impact
Supporting you to improve the visibility of your repository and demonstrate the reach and impact of your research

- **IRUS-UK**: The number of institutional repositories (IRs) participating in IRUS-UK continues to rise. Comparable usage data representing 115 or >78% of eligible IRs (by October 2016) presents valuable opportunities for benchmarking usage at a national level.

- A number of case studies outline how several universities are using data from IRUS to support advocacy and for reporting and benchmarking. Our recent blog post summarises each of these.

- Pure portal users requiring access to COUNTER compliant usage statistics will shortly have them available via IRUS-UK with work to support this integration currently underway.

- Hannah DeGroff, Jisc’s OA support coordinator, will be speaking at the UKSG Forum in London, on 16 November on the topic of ‘Exposing ORCIDs through IRUS-UK’: IRUS-UK has been successfully exploring the possibility of exposing ORCIDs - when implemented in institutional repositories via RIOXX - as a way to enhance HEI reporting on the usage of research outputs from individual academics.

- **The ORCID national consortium** continues to grow, with 76 organisations involved, including the Research Councils. Jisc is offering full UK support to consortium members.

- **OA dashboard**: This new project will start later in 2016, and will explore how all the data from the various Jisc, local and third party services can be brought together to give a full picture of OA at the HEI level, and perhaps nationally.

- **OA Button project**: Jisc continues to support this project, but there is to be a slight change of direction for the OA Button project to work with ILL information; consultations around this will start in 2017. The original OA Button remains but may not be developed as originally planned.

**Metadata and interoperability**
Helping you to overcome interoperability issues between funder, publisher and institutional systems

- RIOXX metadata fields support RCUK compliance and some of the REF metadata requirements, with around 55 HEIs having now installed RIOXX. Plugins for both RIOXX EPrints and DSpace are ready to use.

- An EPrints REF compliance checker and supporting webinar are now available. This enables instances of EPrints to check REF compliance in the repository. A DSpace REF compliance checker is being developed and will be released in November 2016.

- **A CASRAI UK chapter** has been set up. This will be an opportunity for institutions to discuss their needs, taking into account existing metadata and vocabulary initiatives. A call for various areas of OA interoperability has been released.

**Maintaining OA good practice**

- Following the end of the OA good practice initiative in July, we have been synthesising the project outputs. We are creating a handbook, which summarises and links to the projects’ efforts under the themes: cost management, workflows and structures, metadata and interoperability, policy and baselining, and advocacy. A planned animation will also summarise the initiative. For more, visit our OA good practice blog, follow @OA_GoodPractice on Twitter, or email OAGoodpractice@jisc.ac.uk.

**Key dates:**

**October**
- 24-28: Announcement about Jisc Monitor services

**November**
- 1: OpenAIRE workshop for UK HEI
- 2: Research Data Alliance workshop
- 16: UKSG Forum in London