Welcome to the December issue
The recent development from cOAlition S, giving information on issues of implementation, shows that the release of the Plan S principles really was just the first stage in its longer term development. It has become clear that these principles are now seen by many as being both timely and necessary to change the pace of open access reform. Although some scholars have expressed concerns, it is significant that the number of signatories has continued to grow, with, to date, an additional seven bodies. Interest and support is worldwide. Although started in Europe, it is gaining global traction. The recent Berlin Conference has issued a communiqué, underlining support for the drivers of Plan S, shows that the giving phenomenon are now having to think again. We are pleased that OpenDOAR is being seen by cOAlition S in a central role in identifying compliant repository venues: our development plans accommodate this.

May I wish you all, on behalf of the OA team, a very happy Christmas and New Year!

Bill Hubbard, Head of scholarly communications support

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

» Publications Router: Frontiers has become the latest publisher to supply content for onward dissemination to repositories, providing full text in the version of record. A further six publishers seem very close to starting, subject to further testing and discussion. We are working hard to tie up the remaining technical and legal issues – keep an eye out for announcements. Discussions have also moved forward positively with several CRIS vendors: two of them say they have started work on processes to enable their systems to capture content from Router, and a third has indicated they hope to start on this next year. If you use a CRIS, do ask your vendor about their plans and make sure they are aware of your priorities.

» Sherpa services: Work continued on our service improvement programme and this period saw an internal beta launch of Sherpa RoMEO v2. We have been reviewing and updating the existing Sherpa RoMEO data for accuracy and a public beta of Sherpa RoMEO v2 (with a limited data-set) will be released in January for community consultation and feedback. Sherpa REF and Sherpa FACT are also being re-developed as part of this programme and will be available as beta services in March.

Cost management
Support with improving your processes and systems, providing shared services and negotiations agreements, in order to manage the costs of OA and subscriptions

» Monitor services: We are continuing to develop and release updates to both Monitor Services. Monitor Local has recently had a new release which included an improved facility to record payment date information, without requiring invoice details (particularly useful for our users who wish to record credit card payments), as well as improvements to the Jisc TCO report. Lots of work has been taking place on Monitor UK, and we are now almost ready to release Monitor UK v2.0. This will incorporate a refreshed user interface, and updated, clearer, more accurate charts and graphs. We are currently looking for institutions to test this new update to Monitor UK, so please do get in touch if you would be interested, or indeed if you would like a demo or trial of either/both Monitor Services: contact us at help@jisc.ac.uk.

» Jisc Collections: Our 2019 requirements for transformative OA agreements are referenced in the new Wellcome Trust OA 2020 policy. If an agreement meets these requirements, then it will be compliant with their new policy which comes into effect in 2020. Our requirements also align with the Plan S guidance on implementation. Negotiations for the major journal agreements that renew in 2019 are progressing – institutions have been consulted on the 6th proposal from Wiley, the 5th proposal for SpringerCompact has been rejected and negotiation continue, the Nature Research Journals agreement is complete and CUP is being finalised. ACS and T&F proposals are under review but the existing T&F offset agreement will continue for a further year in 2019.

To find out more about our open access services email help@jisc.ac.uk or visit our website https://ji.sc/open-accesss
Discovery, usage, and impact

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

» **IRUS-UK**: A recent enhancement to IRUS involves an initial series of data visualisations created using Tableau software. Visualisations indicating download trends over time, downloads by item type and downloads by country offer alternative views of data held within the portal and flexibility to present IRUS usage data in an engaging format. Further visualisations to supplement the initial set will be released in 2019 Q3. Three new case studies published on the website in October outline how IRUS-UK has collaborated with international initiatives (CORE, OAPEN and OpenAIRE) to enhance the provision of COUNTER conformant usage statistics globally. A webinar aimed at repository managers new to IRUS-UK was recorded recently and is now available.

» **The Jisc ORCID national consortium**: Most institutions have now successfully renewed their membership for the next three year licence period and we have also gained four new members. The importance of ORCID in the development of research reporting, tracking and OA provision has clearly been recognised and our renewals - and the value of the Jisc-led consortium - reflect that. ORCID has also received a boost from an open letter from funders in support of implementing best practice ORCID workflows. If your institution has not renewed yet do contact us.

Planning is also ongoing for an ORCID hack day in spring 2019 with invitations and further information available in Q1 2019. The annual consortium members’ day is scheduled for 15 May 2019 in Birmingham so please save the date!

» **CORE**: CORE continues to go from strength to strength as the world’s largest aggregator of OA content and more specifically, over the last 3 months CORE had more than 25 million users, tripling usage compared to 2017. Read more 2018 statistics about CORE in an end of year blog post from the team at the OU.

» **OA discovery**: We will be releasing a report in the New Year on the open access discovery landscape, the platforms and tools that support it, and what the future may look like in this space. The aim for this work is to inform how Jisc, working with others, can address common challenges faced in this area and ultimately better support researchers and libraries in discovering and accessing OA material. The OA discovery landscape has a number of integral actors, from innovative OA discovery products to more established public infrastructure, well-established library discovery services and long-standing commercial services. Given the potential range of OA discovery tools ‘on the market’ and the fact that libraries and researchers themselves are making important decisions as to how to engage and use such products, we wanted to better understand the landscape and accuracy/completeness of the search function of some of these products at scale.

Text and data mining- CORE/ Journal Archives: The Jisc Gateway to Text and Data Mining project is exploring opportunities for a potential text and data mining service across CORE and Journals Archive. The goal of this investigation is to provide a solution which supports both experienced and beginners in TDM – a service that is intuitive and easy to understand, yet with capabilities sufficient to be of real value to a range of researchers from across disciplines. Given the range of potential users, making sure we place user requirements, assumptions and expectations at the centre of the development of a potential service, is an essential facet of the project. We are therefore currently testing ideas and lightweight prototypes with potential end-users and those who may be supporting their research activities, to ensure, from the start, that the service addresses their requirements. The current phase of user-testing is set to conclude in February, when a decision will be made on the next phase of development activity. Any new plans will be communicated once we know more.

» **OpenAIRE**: The OpenAIRE Legal Entity came into official existence on the 19th of September 2018, with four initial signatories. A community-driven organisation at heart, OpenAIRE accomplishes a participatory infrastructure via its established network of 34 National Open Access Desks (NOADs) in EU member states and associated countries, accompanied by a service-driven approach which aims to support, accelerate and monitor open science. OpenAIRE is an integral part and a leading force behind the developments of the European Open Science Cloud (EOSC).
Maintaining OA good practice

» **Community events:** We ran an OA community event in Belfast in November and are currently planning our 2019 schedule of events. We have an event on "Developing a skilled workforce for scholarly communication and open access" in York on February 7th - this is now open for booking.

We are working with representatives of the repository community and the Practice Research Advisory Group (PRAG) to run a joint event on "Documenting practice-based research: technicalities, practicalities and principles". Save the date for 15th March in London - booking details will be available in early new year.

» **Open access briefing papers:** As part of Open Access Week in October, we released a series of briefing papers providing a background to many of the complex areas of open access:
  - Considering the implications of the Finch Report
  - Alternatives to green and gold for journal articles and conference papers
  - Fixing the repository landscape
  - The potential of global identifiers
  - OA monographs in the UK

» **Keeping up to date:** In between our quarterly digest you can keep up to date with our activities on our scholarly communications blog or follow us at @JiscOpenAccess on Twitter.

Key Dates
Events we’re running or where you’ll catch Jisc staff speaking

**February 7:**
OA community event: Developing a skilled workforce - the skills needed to support scholarly communication and open access. **Further details and booking**

**March 15:**
OA community event: Documenting practice-based research: technicalities, practicalities and principles, London **Save the date**

**May 15:**
Jisc ORCID consortium members’ day, Birmingham **Save the date**