Open access update

Issue 14: September 2019

Welcome to the September issue
In this release of the update we have information on a significant publisher addition to Router, new facilities in CORE, updates to RoMEO and OpenDOAR, more work from the ORCID consortium on persistent identifiers, developments to IRUS and more. Jisc is working hard to put in place the support that our members will need for a Plan S world. We are looking to a future with open monographs, collecting inputs from across our community to guide developments and future work and to feed back to policy makers. Jisc Collections continues its negotiations with publishers on behalf of the sector, including transformative agreements as a core component.

The next 12 months promises to be a critical time in the development of scholarly communications. I look forward to working with our members and stakeholders to make sure that Jisc supports them through the changes and challenges we all face.

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: IOP Publishing is the latest publisher to provide a live full-text feed, starting with its gold OA content. They will add accepted manuscripts of subscription content later, once they have developed their workflows to accommodate this. We continue our discussions with a wide range of additional publishers. Our work with Crossref to set out how publishers could better populate their licensing metadata resulted in new guidelines from Crossref. These are aimed especially at helping with the green OA use case that Router serves. If publishers follow them, it will make it easier for institutions to identify which version of a given article they may expose, when and under what terms, at the article level. Router interprets and transforms this metadata into a form that repositories can ingest – but it should also be helpful to institutions around the world. Progress towards interoperability with key CRISs continues.

» Sherpa services: With both RoMEO and OpenDOAR identified by cOAlitionS as essential support services, much of our efforts over the past few months have focused on preparing our services to support the implementation of Plan S principles. Our recent work on service improvements saw the delivery of new versions for RoMEO and OpenDOAR. Both services now have updated data models and have undergone a complete review of existing data sets, which has resulted in improvements in both the accuracy and currency of the information we hold. Sherpa REF and Sherpa FACT are also being re-developed and will be available as beta services over the coming months. Going forward we aim to focus our efforts on increased community engagement with a view to gather emerging requirements for our policy service. We aim to refine the existing use-cases that our services respond to and to develop and identify new use-cases that our services need to support. An output of this work will be a two-year service development plan for our policy services.

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 and a new release of Monitor Local was made available in August. A key highlight of this update was the availability of a new ‘People Import’ tool, which enables institutional Administrators to upload a CSV file of person information to generate people records for their institution. The next Monitor User Group meeting will be held on 14th January 2020 and we look forward to discussions around the development of Monitor and how we can continue to improve the service to meet members’ needs.

» Jisc Collections: Jisc Collections continues to negotiate journals agreements which are affordable, rapidly increase OA output and offer compliant OA publishing routes well in advance of the Welcome OA policy taking effect on January 2021. Having spoken with many institutions in the last few months we know that reducing costs is paramount. We have rejected a number of publisher proposals and continue to secure improvements.

To find out more about our open access services email help@jisc.ac.uk or visit our website https://ji.sc/open-accesss
In parallel with the SPA-OPS project, Jisc Collections is working to develop and offer transitional OA agreements specifically for learned society and smaller publishers. We have contacted over 30 society publishers where we provided support documentation and guidance to improve understanding of and assist in the development of transitional proposals. Consultation feedback from both societies and institutions has been used to further refine the potential models presented in the documentation – recognising the diverse nature of small and society publishers’ missions.

Transformative agreements pilots for 2020 are being taken forward with 6 society publishers who are keen to offer these agreements to UK institutions in a streamlined and efficient manner. We hope to release the first pilot agreement in early October.

**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 total number of active Institutional Repositories represented in IRUS-UK by September 2019 is 139 (a further 23 are retired). Two enhancements to be delivered in 2020 Q1 include: 1) support for COUNTER Release 5 which enables recording of information about metadata views in addition to downloads of full text items (Investigations and Requests), and 2) a service for research data. IRUSdata-UK, a pilot project to explore the research data landscape and feed into the development of standards-based usage statistics for research data held in repositories is to be moved into service so that it is fully supported as part of IRUS-UK. IRUS will produce COUNTER R5-conformant statistics and, in the case of data repositories, provide statistics conforming to both the COUNTER R5 Code of Practice (CoP) and the COUNTER CoP for Research Data. Additionally, a consultation concerning removal of the current Shibboleth authorisation mechanism to support access to open data is underway in September.

» **CORE aggregation:** CORE is the world’s largest aggregation of OA content: 135 million metadata items, 13 million full text. CORE has a strategy to integrate its data with, library discovery services, archives, and other academic services. Most recently has integrated its data in ExLibris, enabling them to use CORE data in their Public Available Content (PAC) product. A PubMed Central linkout service is being planned and Microsoft Academic now links to full texts available from CORE. This is for about 9 million pages (and growing). CORE now have a collaboration with the Turnitin service, supplying full text for plagiarism detection. The benefit to repositories with this integration strategy means is that repository content is more discoverable through these services. No other global OA aggregation does this.

» **The Jisc ORCID national consortium:** Currently we have 96 members in the UK consortium. Through our hackdays and events, we have been exploring a solution to discovering ORCID IDs across different systems and pulling them into a dashboard. We are also engaging in a number of PID initiatives including, the **Research Activity ID (RAiD). RAiD is an identifier for research projects and activities. It is persistent and connects researchers, institutions, outputs, and tools together to give oversight across the whole research activity. RAiD infrastructure will push open metadata to ORCID records. We also continue to work with vendors so that the systems used by our members provide more features to take advantage of the ORCID API.**

» **OpenAIRE:** The general assembly for the OpenAIRE Legal Entity took place during the Open Science FAIR in Porto, Portugal in September, where additional institutions and organisations will sign up to participate in the LE. In addition, various OpenAIRE dashboards are now available for content providers, funders, and for the open access/open science communities. All Horizon 2020 projects should have received an email reminding them of their open access mandate and in some instances the research data pilot. This time around, the message included a request from UK Research and Innovation for including the research outputs into their portal.

**Open research hub:** The Jisc open research hub is a modular service providing repository, preservation and reporting functionality for HEIs to manage, share, store and preserve their digital research outputs. In the last quarter, we have completed the work to integrate the Jisc repository and our preservation systems. As a result, the ‘end to end’ workflow (submission of digital objects into repository, leading to automatic ingest into preservation system) is now fully functioning. In addition, HEIs with Pure as their CRIS can now submit digital objects to both the Jisc repository and the preservation systems using Pure as the front end. Please do contact us if you would like to find out more about our open access services email help@jisc.ac.uk or visit our website https://ji.sc/open-access
like to trial any aspect of the service. Work on developing the OA functionality which is compliant with Plan S and Next Generation Repositories guidelines is ongoing.

Maintaining good practice

» OA monographs: 2019 has been the year of the OA monographs report. The Universities UK working group released a synthesis report about workshops held for learned societies and publishers in 2018. A report on the Critical Issues in Open Access and Scholarly Communications event for academics at Goldsmiths College, London is due shortly (a draft report is available). Science Europe have also just published a briefing paper on Open Access to Academic Books.

In July, we convened an event for research and academic liaison librarians, repository managers, press managers and other interested parties. The event gave the opportunity for attendees to address issues, share experiences and expertise, and to shape future work for both Jisc and the sector. The programme consisted of an introductory presentation from Jisc and Research England, followed by lightning talks giving perspectives on researchers concerns and workshop sessions.

We have prepared a blog about the outcomes of the workshop, which will be released in October to coincide with the publication of final two reports from the UIUK working group. The first is a data analysis of Open Access Monographs in the UK carried out by Fullstopp Gmbh and funded by Research England, Jisc, the British Academy and the Arts and Humanities Research Council. The second is the evidence review from the Universities UK Open Access Monographs Group, which details a number of key recommendations.

» Community events: Save the date – 27 November - for an event in London focussing on Plan S. How are institutions preparing for Plan S and how is Jisc supporting its members? We are also planning an event in Spring 2020 around repositories and practice research, a follow-up to last year’s popular event.

Blog post round up

Posts from the last 3 months you may have missed:

» Transitioning textbooks to open, lessons and insights
» IOP Publishing supplies full-text content to Publications Router
» Share and share alike – survey finds barriers to pooling research equipment
» Horizon 2020 and UK Research and Innovation Requirements for H2020 Projects
» Embedding IRUS-UK statistics into IR web pages – the IRUS-UK widget
» Critical issues in open access and scholarly communications – draft report
» Open Repositories 2019 in Hamburg – themes and perspectives

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.

You can now sign up for email alerts for the scholarly communications blog.

Key dates

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

September
30: UKCoRR members’ day, London

October
15-17: FORCE19 conference, Edinburgh
21-27: International open access week

November
20: Challenges in the scholarly publishing cycle, London.
27: Jisc OA community event on Plan S, London *save the date – booking open soon*

December
OpenAIRE General Assembly and Annual Meeting

To find out more about our open access services email help@jisc.ac.uk or visit our website https://jisc.gov.uk/open-access