Jisc’s role in supporting the implementation of the UKRI open access policy

Jisc is committed to helping its members effectively implement the new policy. Building on our existing activities and tools, we will be working with researchers, research offices, libraries and publishers to:

**Rapidly scale-up sustainable, affordable agreements to provide UKRI-funded researchers, at institutions and across multiple disciplines and publishers, with ubiquitous access to compliant routes to publish.**

Currently, Jisc-negotiated OA agreements cover about 60% of UKRI-funded output. Jisc will be increasing its engagement and negotiations to put in place OA arrangements that support a broad and diverse publishing landscape and that are sustainable and deliver cost effective OA. Applying a range of models – transitional agreements, green, subscribe-to-open, memberships – will be critical as we work with members and publishers to identify and implement the routes that will be most effective.

Transitional journals are one of the routes that UKRI will support, subject to the journal meeting the sector’s requirements. Jisc is working with its strategy groups and members to establish requirements and, following sector consultation, aims to release these in December 2021.

It is envisioned that, to promote consistency and simplicity, there will be alignment with the sector’s current requirements for transitional agreements and the Plan S criteria for transformative journals. Publishers naturally have questions about transitional journals, and we are keen to discuss these as we work through the requirements with members.

While the focus will be the 1 April 2022 policy commencement date, Jisc will continue to collaborate with publishers and members to adapt, identify and pilot new sustainable, fair and transparent models that help us transition into a fully OA publishing environment both for journals and monographs.

**Provide tools for authors and research organisations to navigate available OA options, improve workflows and automate reporting.**

Jisc understands that clear, comprehensive and timely policy information is crucial for the research community, as part of OA publication workflows. As a globally recognised resource for journal policy information, Sherpa will undergo significant enhancements in order to enable any UKRI-funded author to identify all available compliant routes for the journal they wish to publish in, with confidence.

As a first step, Jisc is in the process of building new functionality to Sherpa that enables researchers to check which transitional agreements their institution participates in, and which journals are covered by the agreement. The initial version of the tool will be available in late 2021.

We are also working to merge Sherpa services so that they can be accessed via a single platform with a redesigned look and feel. We will be implementing better search technologies, adding new datasets and increasing our data review and curation activities.
This will result in a more interactive and flexible service, enabling users to quickly query journal policies and ascertain immediately the compliance status of any particular journal with UKRI policies. We will then be looking to apply this streamlined approach to support authors in navigating different publishers’ policies for OA monographs.

One of the key aims is to ensure that Sherpa is embedded within the scholarly communications ecosystem, complementing existing infrastructure, including the Journal Checker Tool. We will ensure that the data underpinning Sherpa is widely accessible to Jisc and third party applications, developers and partners through API-led connectivity.

If you are a Sherpa user and would like to contribute to its future development, get involved by joining our Sherpa Users mailing list.

Jisc is dedicated to supporting institutions in updating their processes to transition from supporting subscriptions to OA. Through collaborative and coordinated efforts, we will identify and implement ways in which our relevant services, such as Publications Router (which automates the deposit of articles into institutional repositories), can be better integrated and fully interoperable with other systems in scholarly communication workflows.

Finally, we recognise that members need a scalable, robust solution to report on OA costs and compliance. To meet this need, we plan to develop a solution for managing, monitoring and reporting on open research publications for HEIs (research office staff and authors) and funders. This solution will be integrated with the OA Switchboard.

Gather and analyse data to monitor and evaluate the performance of transitional arrangements and enable members, funders and publishers to understand the progress and impact of these arrangements in the context of the UK’s ambition to achieve 100% OA.

Working with publishers and members, we currently collate, clean, enhance and standardise a broad range of cost, usage and article data. We will continue to expand our data activities, developing business intelligence dashboards and visualisations for the sector to assess the value, progress and impact of transitional arrangements.

We will also work collaboratively with publishers and international consortia to encourage and advocate for the use of standard, international frameworks to enable the transition OA to be monitored at both a UK and global level.

Work with UKRI and the research sector, including a diversity of research organisations, researchers, and representative bodies, to develop an understanding of the challenges around open access, to share and develop best practice, and deliver support.

When it comes to the implementation of a new policy, there are inevitably questions and challenges that arise. Jisc will work to understand those challenges and gather requirements at each stage of the OA publication workflow.

If the relevant infrastructure exists at member institutions and it can be enhanced to resolve and automate knowledge transfer, this will be Jisc’s priority. However, we will also offer practical support where needed and work to provide clarity on key questions around implementation.

Essentially, our role is to make it as simple and cost effective as possible.

Anyone with questions or would like to engage around a particular topic, is welcome to contact us via help@jisc.ac.uk or liz.bal@jisc.ac.uk.

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