Should we invest in OA?

Monica Hammes
University of Pretoria : Academic Information Service
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Should we invest in OA?

Yes, of course, but **Invest**, not just hope for the best
Why, oh why is the spontaneous crowd so slow and in such disarray?
OA in South Africa - 2007

4 OA journals ([www.doaj.org](http://www.doaj.org)), 2 SAPSE accredited

9 OA repositories, 7816* items
  6 etds only
  3 combination of types (university wide)
  2 combination of types (dept/faculty)

1 OA mandate
Reasons for slow uptake

• Getting all our ducks in a row
• We do not really understand the outcomes and what it will take to realise them
• We advocate and lobby ineffectively in an uncoordinated fashion
• We are not in touch with the world of research and scholarship: dissemination (and copyright) is not on the agenda
Benefits of OA (1)

AUTHORS OF RESEARCH ARTICLES AND THESES

° Visibility → usage (+25-300%), citation, impact → research progress

° Reliable preservation (better than own web sites)

° Funding opportunities

° Complete view of individual research output: Showcasing achievements and useful for reporting: university, NRF, DoE…
Benefits of OA (2)

RESEARCHERS AS READERS

° Access to all articles = selectivity advantage → able to use and cite the best and most relevant work

° Easier access for collaborators

° Fast tracking new research cycles
Benefits of OA (3)

RESEARCH INSTITUTIONS

° Dynamic means to manage information assets: consistent and controlled exposure and preservation

° Leading to visibility, partnership with national and global initiatives, funding opportunities, reputation, copyright savings

° Complete view of institutional research output, inter-connection of different objects, better monitoring, assessment and management of research
Benefits of OA (4)

COUNTRIES:

° Better return on investment (Houghton 2006)

° Substantial increase in impact factors, particularly for developing country journals

° Openness decreases the risk of duplication, removal of competition makes science less wasteful
What it takes

**Benefit:** Controlled dissemination

**Important for:** Institution, research managers, researchers

**Types:** Journal articles, etds, conference papers, unique digitized material, OA journals

**Desired outcome:** Increased impact

**CSFs:** extensive coverage, researcher participation, better copyright practice, linked to research report (and RIMS), institutional mandate (with adequate resources)
Effective advocacy

Advocacy has a lot in common with marketing:

• Segment your target groups
• Tailor your message to suit their needs and concerns
• Deal only with those aspects that are important to them
• Provide convincing evidence in their language through the most appropriate means of communication
What it means to invest in OA

Investment implies a long term view and expectation of value that will be created when good ideas are combined with appropriate resources.
What do good investors do? (1)

Use the best investment instruments

• We have a unique window of opportunity to forge a new relationship with research community: collaborate to change scholarship and copyright restrictions
• Help them understand their role and responsibility
• Convince them to contribute personally – lifelong habit
• Create a supportive environment
What do good investors do? (2)

They keep track of a variety of indicators

• This is not (just) a library thing: it is about research, publishing and copyright

• The job of research is only half-done if the results of that research cannot reach the widest audience (Wellcome Trust)

• Tony Hey’s visit in 2006

• SARUA (November) to our advantage

• The ASSAf Report
The ASSAf Report: Goals

• Creation of a strategic framework to
  - promote/enhance the standing and effectiveness of South Africa’s research journals, nationally and internationally
  - improve the productivity/efficacy of publication through different modalities (e.g. electronic publication)
  - establish the South African Journal of Science (SAJS) as a “national asset” of high quality, and
  - ensure that discoveries and insights gained through research published in South African journals were made known to a wider public than the research community itself.
The ASSAf Report: Recommendations

5: Open Access initiatives be promoted to enhance the visibility of all South African research articles and make them accessible to the entire international research community. Specifically:

• the online, open access version of South African research journals should be funded in major part by author page charges (“Gold route”) ….

• a federation of institutional Open Access repositories, adhering to common standards, be established (“Green route”), …

• national harvesting of South African Open Access
The ASSAf Report: Recommendations

8: that the South African science/innovation community, including government agencies, should do all it can through international action to promote the development of a non-commercial, expanded, diversified and more inclusive international listing and indexing system for research journals, including those published in developing countries, within the evolving electronic knowledge-disseminating and archiving system.

9: to be evaluated in three years time
The ASSAf Report continued

• ASSAf Committee on Scholarly Publishing to implement the recommendations
• DST support and funding pledged
• Investigating a more equitable system of research accreditation
• Investigating publishing options for SA journals
What do good investors do? (3)

Commit resources

• MIT DSpace: $71 per item per year
• In Australia the cost of getting an article published (authoring, peer reviewing, editorial activities) is AUD19,000.00

What do good investors do? (4)

Learn from others, especially the experts

• Budapest Open Access Initiative
• SPARC, SHERPA, JISC, DARE, OAI
• Second generation insights: Rochester, Cornell, Alma Swan
• An active international community, regular conferences: CERN, Lund, Glasgow ...
• South African experts, workshops etc
What do good investors do? (5)

They network extensively

• Community of practice: Sivulile “revived”
• List open and advertised SA experts list
• RoMEO SA (eIFL)
• Beyond the library

• Focused workshops/roundtables needed
What do good investors do? (6)

They take the plunge (or the bull by the horns)

• JUST DO IT!
Sources

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He who hesitates is lunch

monica.hammes@up.ac.za

Graphics: