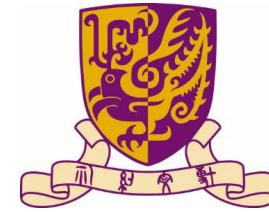


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香港中文大學
The Chinese University of Hong Kong

Moving the Dial on Open Access

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The Chinese University of Hong Kong (CUHK)

Thursday, 09 November 2023



APAC
Library Dialogue

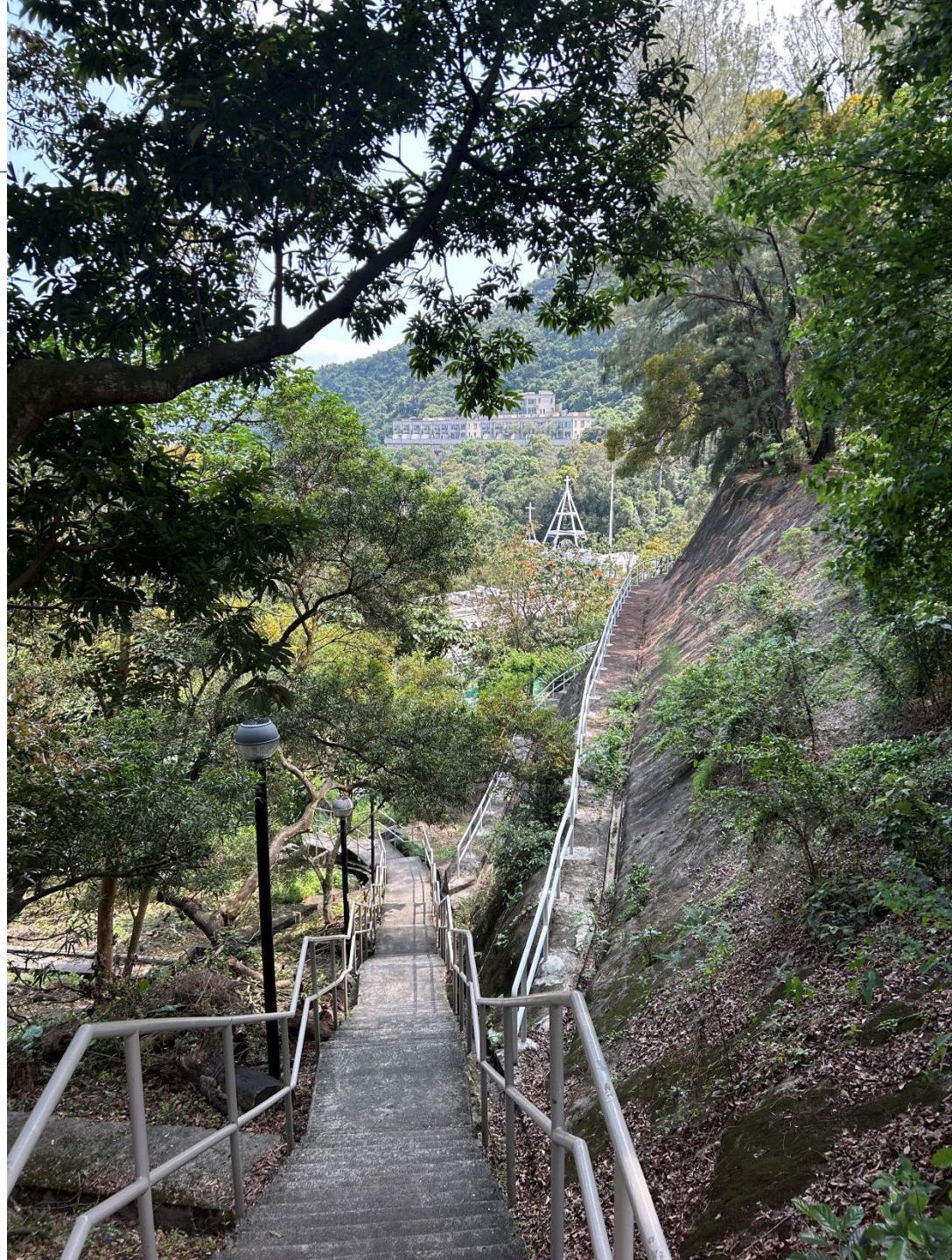
Outline

- 1) Introduction
- 2) The role of the librarian
- 3) Empowering culture change
- 4) Shaping a sustainable future for Open Scholarship
- 5) Conclusion

1) Introduction

On the path towards Open Access...

- Where are we going?
- How far along are we?



2) The role of the librarian

Lead

- Take ownership of the move towards Open Access
- Articulate the case/benefits for OA, including transitional arrangements like TAs
- Convene and coordinate with peers
- Sow the seeds and empower culture change
- Extend the level of ambition and shape a sustainable future for Open Scholarship

Learn and Educate

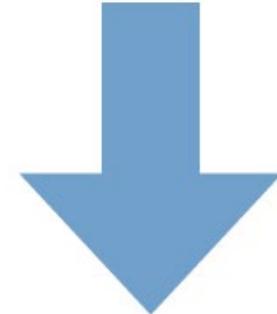
- Seek sources of information on OA developments (publishers, consortia, consultants, etc.)
- Educate and engage with
 - Faculty
 - Early Career Researchers

Advocate

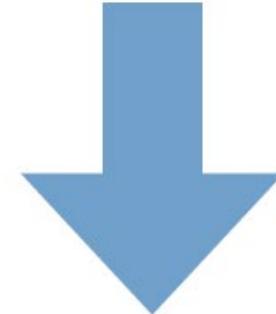
- With University leaders
- With publishers
- With Research funders
- With supporters of universities at large

3) Empowering culture change

Open Science =
(Open Outputs + Open Infrastructure) x Cultural Change



**Access, reuse &
discoverability**



**Evaluation & researcher
behaviour**

Cultural Change Model for Open Science (MacCallum in LERU, 2018)

Empowering culture change

Learning from other regions

- Europe: Plan S
 - Policy vs realities of implementation
- North America: Public Access to Federally Funded Research / Nelson Memo
- South America: SciELO



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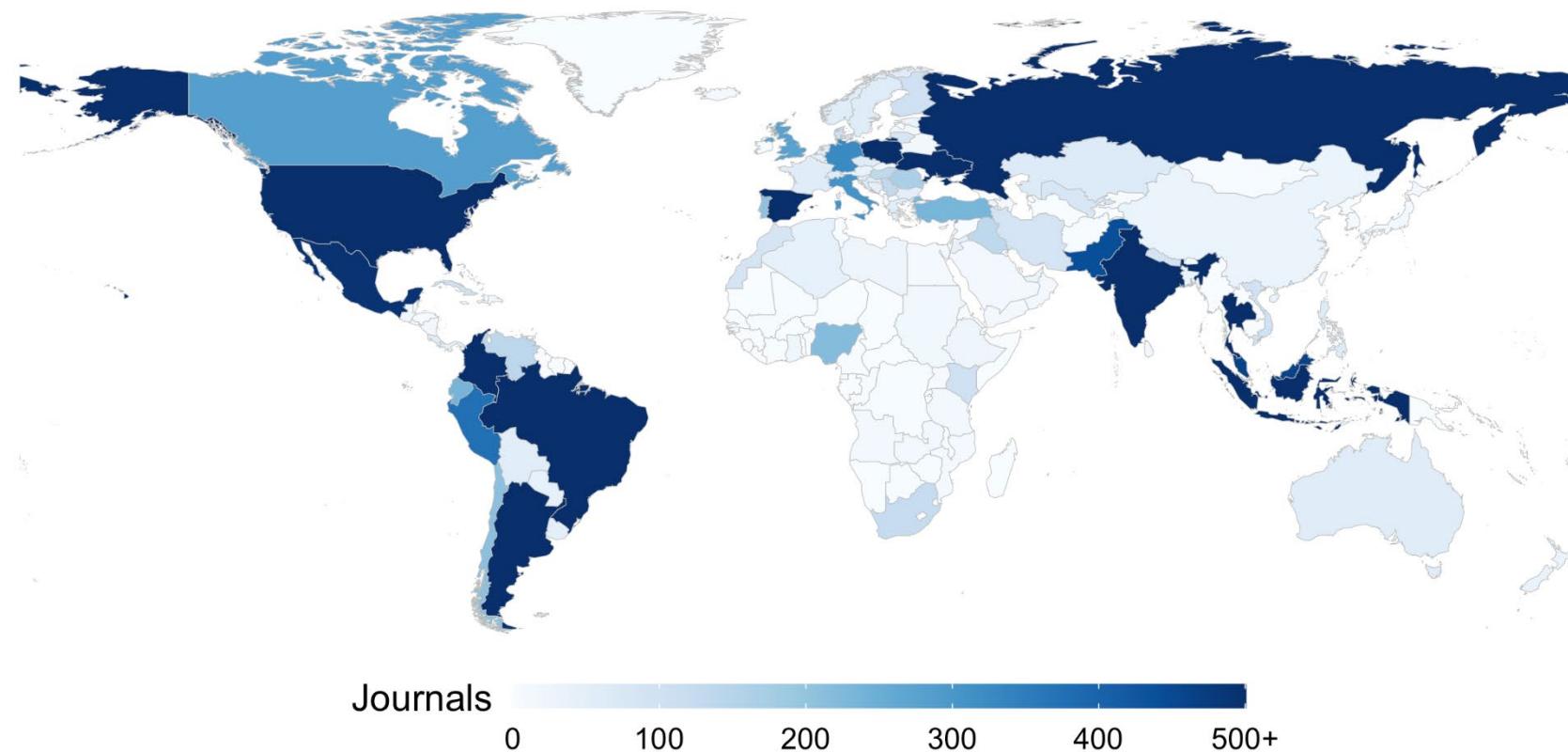
Open Science and
its role in universities:
A roadmap for cultural change

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Empowering culture change

Learning from other regions



Map showing levels of activity in journals using Open Journal Systems (OJS) (source: PKP, 2021)

4) Shaping a sustainable future for Open Scholarship



Shaping a sustainable future for Open Scholarship

In Europe, Plan S may be the shock to the system which provokes a major shift, but this would be the **start of much wider changes**, rather than the answer in the move to Open Scholarship. Inter-dependencies (the “8 pillars”) span vast areas of the research system:

1. Future of Scholarly Communication
2. European Open Science Cloud
3. FAIR Data
4. Skills
5. Research Integrity
6. Rewards
7. Altmetrics
8. Citizen Science



Shaping a sustainable future for Open Scholarship

Making our way along the path to Open Access

- Recognise that we are all collectively learning how to realise OA
- Gather data:
 - in many cases, librarians and universities do not have the data readily available to assess the value of TA offers
 - collect evidence for how OA good practice is making a difference in your institution
- Compare: we are learning from own experiences to achieve the best deals (e.g. through TA negotiations over time) and from other libraries in the global academic community, who have been there before



Shaping a sustainable future for Open Scholarship

What alternative is there?

- Librarians have agency in shaping the future of OA!
- Where TAs do not provide benefit, or increase costs without justification, walking away *is* an option
- Open Access publishing from academic libraries
- Spread the word for good models of OA practice
 - in the academy, between libraries, between different publishers



Shaping a sustainable future for Open Scholarship

Working in partnership

- Librarians can help bring together researchers, editors, publishers, libraries and funders
- Best outcomes are realized when all parties are aligned
- Identify academic champions/voices for OA in institutions, and facilitate sharing with the wider community of faculty and students
- Engage with university leaders and research funders to develop robust OA policies for our universities and systems



5) Conclusion

The development of Open Access reflects the values of our higher education/research systems.

The advent of Transformative Agreements is a means, full Open Access is the end.

Not all TAs are created equal: effective TAs should enable us to realise a transition to make research open and more efficient.

The wider system of scholarly communications and reward and recognition needs to be fully aligned for Open Science to be sustainable.

By working in partnership with stakeholders in the scholarly communications ecosystem, librarians and publishers can help realise the vision for Open Access.



Thank you.

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Q&A

