



# Report from the OA2020 Transformation Workshop

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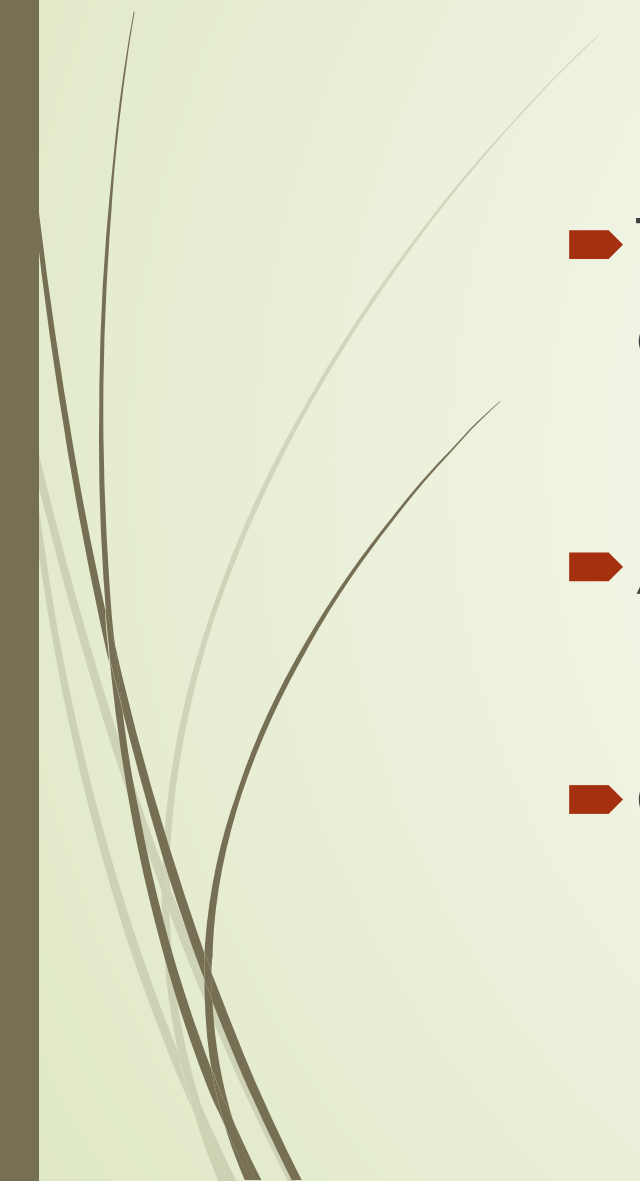


# What is OA2020?

- Global scholar-led initiative to accelerate transition to universal open access
    - <https://oa2020.org>
    - <https://oa2020.us>
  - Educational Opportunities
  - Actions
  - Strategies
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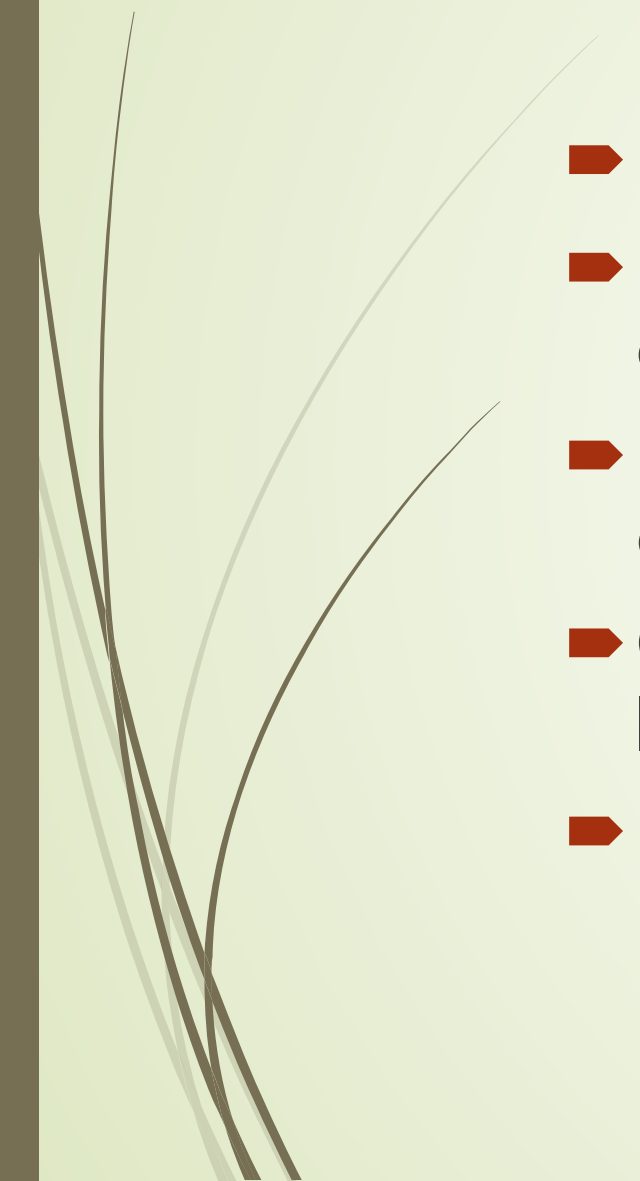


# Goals of OA2020

- Transform today's scholarly journals to open access (OA)
  - Address subscription system head-on
  - Convert resources to support OA publishing models and initiatives
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# OA 2020 Transformation Workshop

- Focus: Unique role of library consortia
  - Learn proactive steps to accelerate transition to open access
  - Develop strategic and practical approaches and workflows
  - Create an OA2020 roadmap to implement locally
  - Have impact on global scale
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# Choosing Consortial Pathways to OA

- UC Campus' example
- Academic-owned infrastructure
- Strategic investments
- Consortial strategizing – working group
- Pathways to OA:
  - <https://libraries.universityofcalifornia.edu/about/initiatives/scholarly-communication>

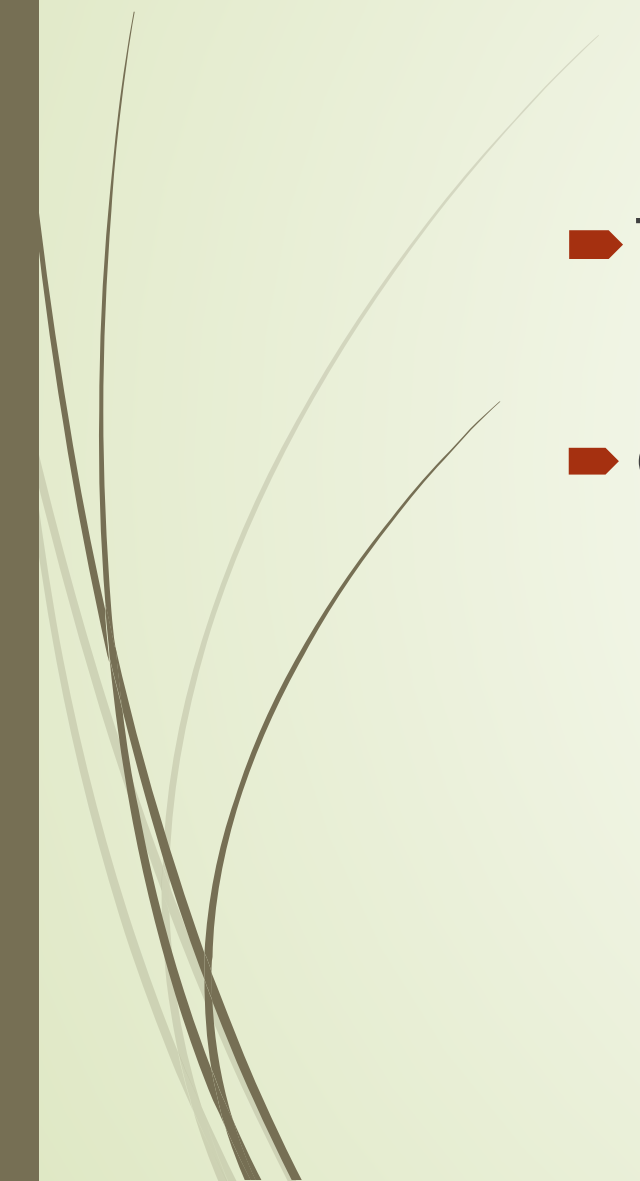


# Challenges & Opportunities

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- Infrastructure
  - Insufficient funds
  
  - Experiment with new approaches, offsetting agreements
  - Engage with disciplines to flip journals
  - Expand funding & memberships
  - Explore research strategies in Global South
  - Move from Pathways to Pilots

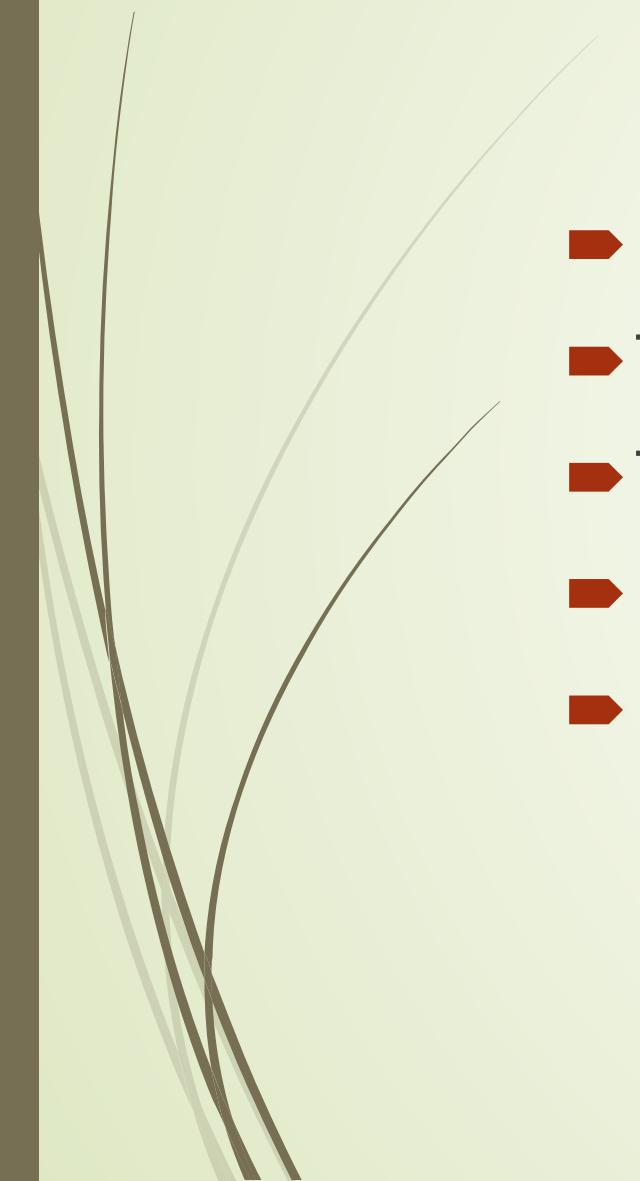


# Libraries Leading Transformation

- Traditional approach
    - Scholarly Communications Librarians
  - Opportunities for libraries and consortia
    - Today's subscription system
    - Expanded scope
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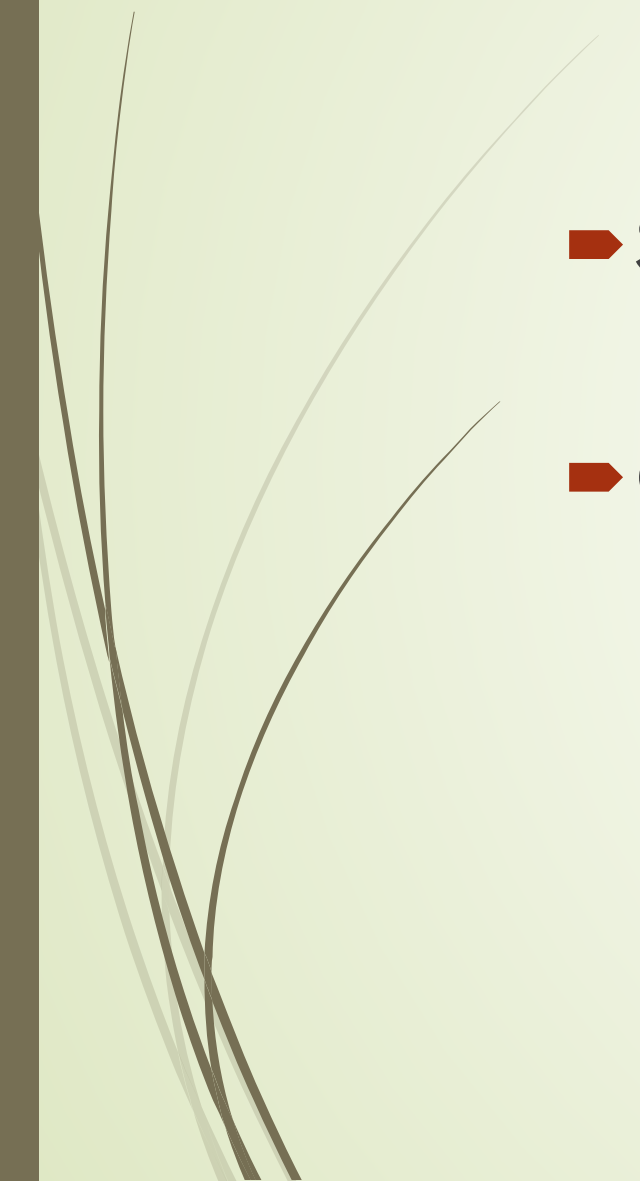
# Porter's Five Pillars of Open Access

- Bargaining power of suppliers
  - Threat of new entries
  - Threat of substitutes
  - Industry rivals
  - Bargaining power of buyers
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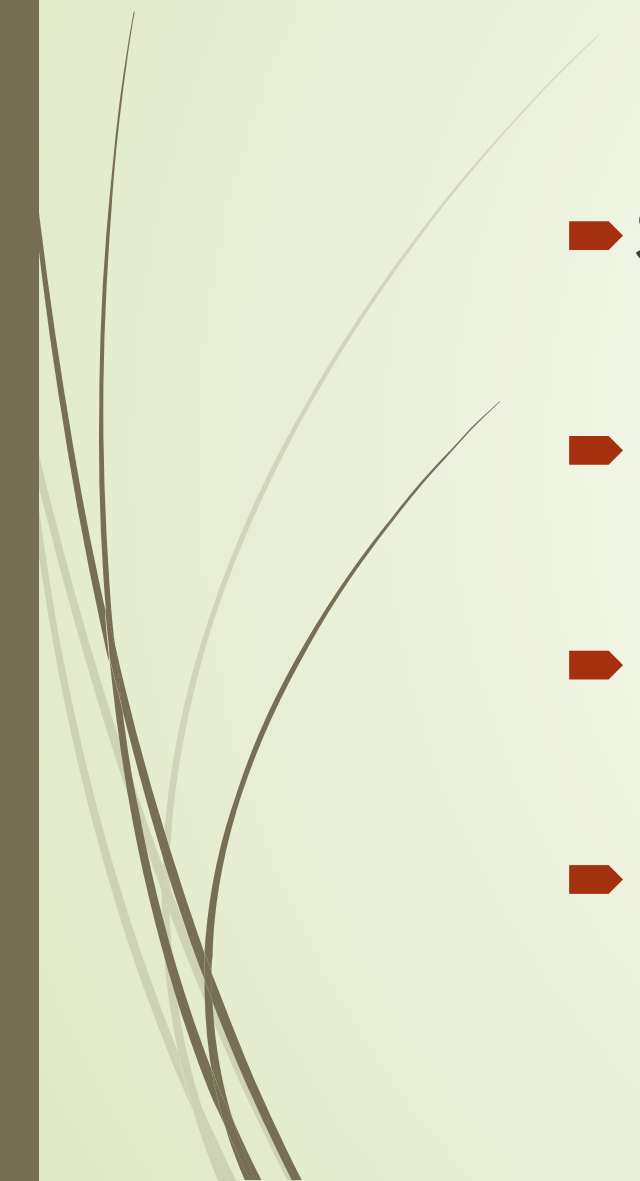


# Key Drivers

- Subscriptions
  - Open ecosystem
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# OA Transformation Strategies

- Sign Expression of Interest with OA2020
  - Divest of Subscriptions
  - Invest in OA
  - Lessons Learned
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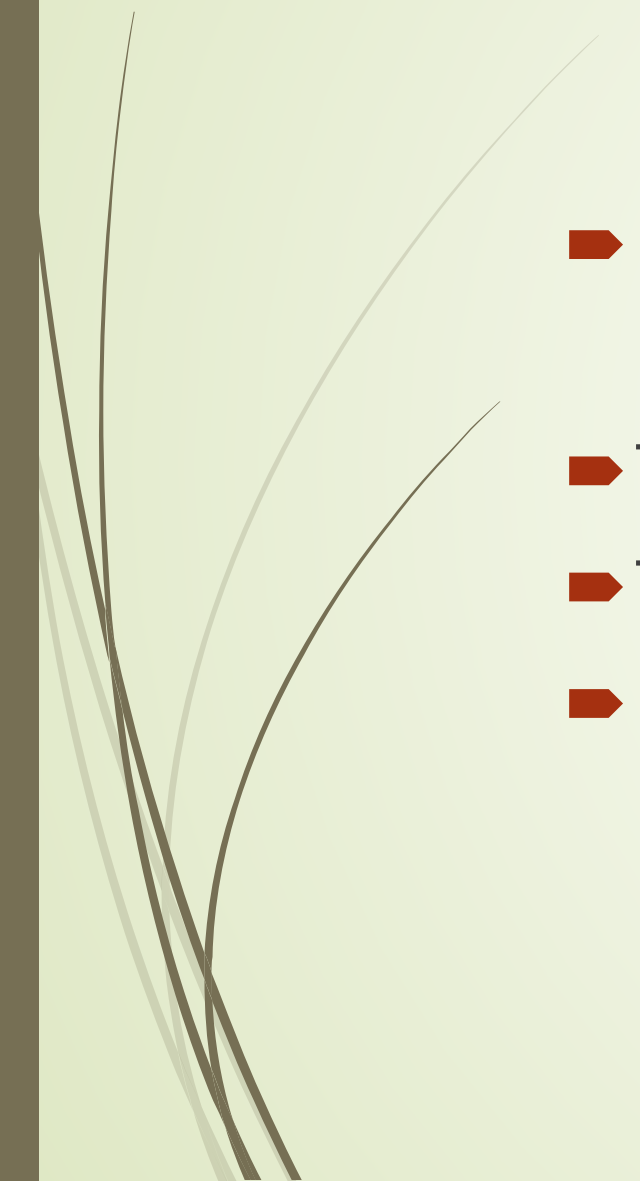


# Transitional Agreements

- Offsetting agreements – more later
  - Read and Publish
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# Getting in Front of OA Publishing Trend

- Data on global publishing trends
    - Traditional and OA
  - Top publishers
  - Top journals
  - Develop publishing chart
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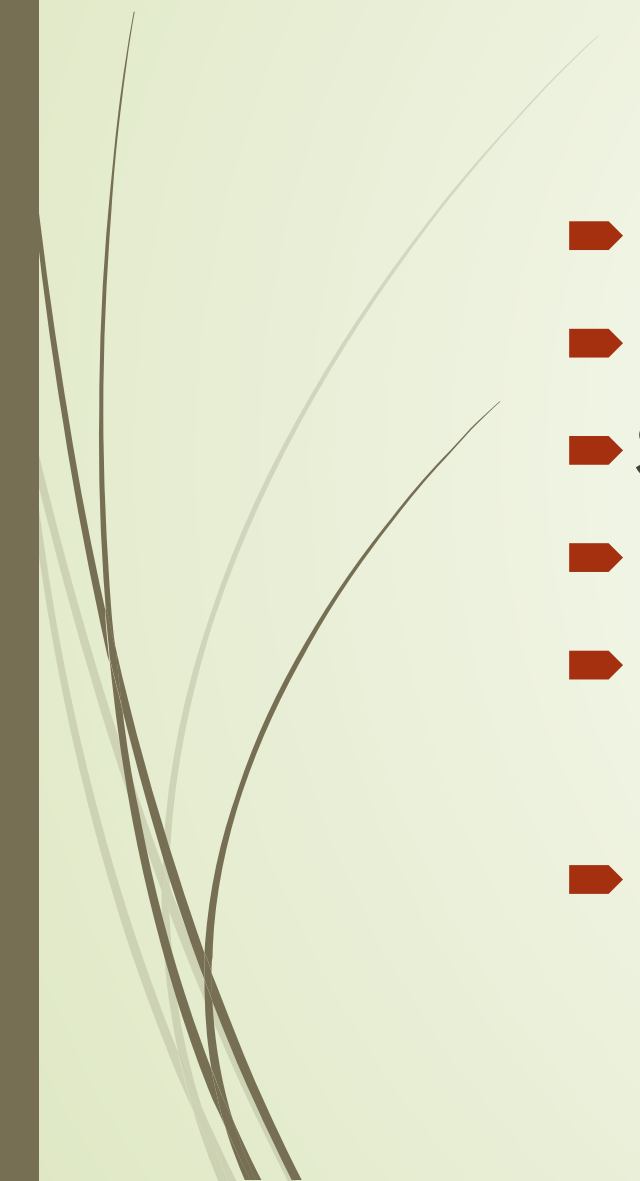


# Pay-It-Forward Model

- Goal: Evaluate viability and sustainability of APC funded model
- Qualitative & Quantitative data
- Collaboration is key
- Create multi-payer strategy
- Key issue: faculty paying APCs directly
- Key takeaway: Know local costs
- Report: [http://icis.ucdavis.edu/?page\\_id=713](http://icis.ucdavis.edu/?page_id=713)



# OA Transformation & Negotiation Strategies

- Data-driven assessment and value
  - Reallocation of finances
  - Support of institutions
  - Focus on new data points
  - Be clear about goals
  
  - Key take-aways
- 



# Key take-aways

- Assess value that we get from publishers
- Shift to value based analyses of publishers
- How do we tackle this
- How much work needs to go into this.
- How to build up the expertise to be able to do this.



# Transitional Agreements

- ▶ Attend to OA best practices
  - ▶ Offsetting agreements
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# Looking Forward

- Sustainability strategy
  - Actions
    - Offsetting agreements
    - OA publishing
  - Further work
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# OA Transformation: Opportunities for Libraries & Consortia

- Review toolkit created by University of California system
  - To reflect upon and repurpose institutional or consortial funds
- Library leadership
  - to leverage relationships with publishers



# Actions

- OA2020 information
  - <https://oa2020.org> or <https://oa2020.us>
- Connect to OA2020 community
  - [community@oa2020](mailto:community@oa2020)
  - <http://lyrasis.org/mailman/listinfo/icolc-oa2020>



# Resources

- OA2020 executive summary
  - <https://oa2020.org/wp-content/uploads/pdfs/Open-Access-2020-Executive-Summary.pdf>
- OA2020 expression of interest
  - <https://oa2020.org/mission/>
- Max Planck Digital Library White Paper
  - <http://dx.doi.org/10.17617/1.3>
- Gold OA Service Level Agreement Template



Thanks and Let's Discuss

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