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
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
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
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

- 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
Porter’s Five Pillars of Open Access

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

- Subscriptions
- Open ecosystem
OA Transformation Strategies

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

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

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

- Sustainability strategy
- Actions
  - Offsetting agreements
  - OA publishing
- Further work
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
- Connect to OA2020 community
  - community@oa2020
Resources

- OA2020 executive summary
- OA2020 expression of interest
- 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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