

Moving towards an open access future: the role of academic libraries

Siân Harris

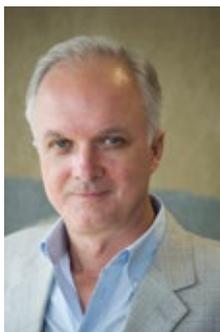
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Foreword



Stephen Barr, President, SAGE International

SAGE as a publisher is committed to supporting the sustainable dissemination of scholarly and educational material, whatever the medium or the business model involved. We are therefore actively involved in moving forward with development of open access initiatives as part of SAGE's mission, ranging from the SOAP (study on open access publishing) project undertaken collaboratively with partners including CERN and the Max Planck Digital Library, to SAGE Open, launched as a broad-ranging interdisciplinary open access journal for the humanities and social sciences. We see the shift to open access as raising issues for the whole of the scholarly communication process, and seek to work with other stakeholders in that process to understand how the whole system can adjust to the major changes which will result from open access to scholarly content. In that context, we were delighted to work with the British Library in hosting an international workshop to review the potential challenges for academic libraries in adapting to a world in which content is available on an open access basis. We are very grateful to the participants in the workshop for their individual contributions to a stimulating and insightful discussion. Events since the workshop, including the publication of the report of the Finch committee and associated statements from the UK government and research councils, and restatement of the position of the EU on access to and preservation of scientific information, have only increased the importance for the many stakeholders in the scholarly communication system of engaging with this profoundly important change agenda.



Caroline Brazier, Director of Scholarship and Collections, The British Library

The research library community has been awaiting a 'sea-change' in the world of scholarly communications for over a decade and it may finally be arriving at our shores. Increasing numbers of academic researchers and policy makers in several countries are embracing the idea that the results of publicly funded research should be as widely available as possible. The benefits of this are well rehearsed. Open Access is expected to speed up research progress, productivity, and knowledge transfer as well as promoting the democratisation of knowledge. While research librarians have been amongst the strongest advocates of open access models, the implications of these models for research libraries and their future role in supporting the research process are less well understood. We must look beyond discussions on the pros and cons of 'Gold' versus 'Green' models to fundamental issues such as the future of research collections, changing skillsets and services required to support researchers of the future, at institutional and national levels. With this in mind, we very much welcomed the opportunity to work with SAGE to host the roundtable at the British Library and to participate in intense and stimulating discussions. We hope this report conveys the urgency and significance of these issues to the wider research community.

Executive summary

On 26 April 2012, a group of 14 librarians and other industry experts met together at the British Library to discuss the role of the academic library in an open access (OA) future. The aims of the roundtable were to provide an international perspective on the likely impact of an open access future on librarians, to identify support and skills required for librarians in such a future, and to further current discussion on support for the library community from their institutions, publishers, funders and other parties.

The group discussed a number of key questions, beginning with setting parameters for what the likely shift towards OA might be in different disciplines and different geographic regions, then considering what the impact of such a shift would mean for the academic library community. This report is a summary of that discussion and the opinions of all participants.

Key discussion points

Defining the open access landscape over the next decade

- Over the next 10 years the proportion of articles published as open access will rise, although estimates of the proportion of open access in that time range from around 15% to 50%
- The scale of the shift towards open access will depend strongly on national and international policy decisions, with policy currently favouring gold open access over green
- There are likely to be variations between subjects, with obvious policy drivers for making STM content, particularly medical articles, open access
- Open access monographs could play a growing role in humanities and social sciences

Changes in research patterns

- Discoverability of open access content will be key to its usefulness; free recommender services are likely to favour links to freely-available content
- Researchers may be reluctant to comply with open access, unless it is a funder requirement
- Text mining will be a key benefit of open access for researchers
- Open access will simplify the information-access picture for institutions with branches overseas
- There is still a strong culture of mistrust and misunderstanding about open access amongst researchers; communicating with researchers and institutions about open access will be an important function for libraries

Changes in student requirements

- Students will increasingly want insight into what resources other students are using, especially those students who are getting good grades; such systems could be provided across all the students studying a particular topic in a region, rather than doing this separately for each institution

Effects on budgets

- A shift towards open access will impact the balance of costs, with nations and institutions that produce significant amounts of research information paying a bigger proportion of the costs
- Moves towards open access are likely to reduce library budgets, although the extent of this will vary between countries and types of institution
- Academic libraries are well-placed to manage gold open access budgets, although some support researchers in doing this directly
- Open access funding will be harder to budget for than subscriptions because of uncertainties over researchers' publishing plans

The role of libraries

- Open access will reduce the importance of libraries developing institutional collections but key librarian skills will still be required
- External discovery systems may be favoured over the library catalogue
- Libraries are well placed to – and in many cases already do – manage institutional repositories
- Managing metadata will be very important for good discoverability of open access resources
- Functions such as metadata management and preservation are likely to be done on a web scale rather than on an institutional level
- Individual library value will be judged on quality of provision rather than on breadth of collection; value will also be added by digitizing and making available unique collections
- Libraries will increasingly need to work together and share functions and services
- Attention will shift from the library to the librarian: 'the information professional is the library of the future.'

Suggested actions

- Academic libraries need to evolve to continue to meet the changing needs of their users
- Libraries will need to look for ways to work together; greater dialogue is needed between libraries about strategies for dealing with open access and best practices
- Clear communication of open access, its benefits, processes and implications is needed for researchers
- A review should be taken exploring attitudes towards the role of institutional collections as more content is available as OA
- As with all publishing models, open access carries both benefits and costs. The group believes that good policy outcomes will only result if those involved in the marketplace are willing to acknowledge and evaluate both and calls upon those involved to maintain open dialogue on open access.

Introduction

On 26 April 2012 a group of 14 librarians and other industry experts met together at the British Library to discuss what the role of the academic library would be in an open access future. The roundtable meeting included librarians from Europe, North America, and the Middle East, representing a range of academic institutions of varying ages, levels of research focus, and style of courses available to students. Many of the participants also have key roles in industry groups and organisations, including IFLA, UKSG, SLA, and JISC.

The aims of the roundtable were to provide an international perspective on the likely impact of an open access future on librarians, to identify the support and skills required for librarians in such a future, from their institutions, publishers, funders and other parties.

The meeting, which was organised by SAGE in association with the British Library and chaired by consultant Simon Inger, considered a range of questions about what role open access will play in the future, and what impact a shift to more open access scholarly content might have on libraries. The participants considered budgets, roles and relationships within institutions, and the impact on traditional library services. This report is a summary of the discussion and the opinions of all participants.

List of questions discussed

1. To what extent do we expect to see journals switch over to an open access model, in other words, what proportion of journal content will be open access in ten years?
 - a. Via institutional or funding-agency repositories?
 - i. And will such access to repository information be organised and content discoverable?
 - ii. If access to “green” OA content becomes organised, will it precipitate an implosion of formal publishing?
 - b. Via author-pays “gold” OA?
 - c. How does this picture vary by broad subject area?
 - i. Life Sciences and Medicine
 - ii. Physical Sciences
 - iii. Social Sciences and Humanities
 - d. Does it have a variable impact internationally?
2. How will a world in which scholarly information is available on an OA basis (in variable proportions) impact future research, teaching, and learning in universities?
3. How will these changes impact academic and research library services, e.g., the role and remit of libraries within the university and the wider research community?
4. How will changes in availability of research information affect the distribution and management of budgets within universities and libraries?
5. What role should libraries play in managing spending by universities on supporting OA (repositories, funds for paying Gold OA fees, etc)?
6. Should libraries take on a publishing function themselves?
7. What skills and capabilities do libraries need to build to address that future?
8. What resources are available to help libraries define their strategies?
9. How will the relationship between university communities, academic libraries, and scholarly publishers change as publishers adapt to new business models?

1. The open access situation over the next decade

1.1 Defining open access

Defining OA is part of the challenge in predicting the future proportion of OA titles. The OA picture is divided into two broad areas.

One of these is gold OA, where payment for publication is made by the author, the author's institution, research funder or another source of author-side funding so that the resulting paper can be read by anyone, anywhere, without the requirement to pay for access or wait for an embargo period.

Papers can be published under a gold OA model in gold OA journals, where every paper is made freely available under the same model. They can also be published in a hybrid journal, where some authors have paid to make their papers OA but other papers are published under a traditional subscription model (where payment takes place on the reader side). Publishers of hybrid journals tend to commit to some reduction in subscription fees as the proportion of OA papers increases.

Published gold OA papers can generally be deposited in institutional and/or subject repositories.

The other approach to OA is green OA, where accepted authors' manuscripts or other pre-publication versions are deposited in institutional and/or subject repositories. This approach works with traditional subscription publishing but many publishers impose embargo periods and particular conditions on publication in such a way.

1.2 Proportion of journal content that will be open access

In order to predict the future impact of OA on libraries, it is necessary to consider the situation today and what it might be in 10 years' time.

Today, around 10-15% of articles are published via a gold OA model, although this figure depends on how it is defined, noted participants.

In addition, while the number of OA papers is growing, so is the total number of papers. This means that anticipating the proportion of articles that will be OA depends on predicting the growth of OA relative to the total growth. Predictions are further complicated by new entrants joining the journal-publishing market, in addition to established journals switching to hybrid or fully OA titles, or established publishers launching OA titles.

Nonetheless, roundtable delegates endeavoured to put a figure to the proportion. One participant noted the response to similar questions at the recent ICOLC (International Coalition of Library Consortia) meeting in Denver, USA. In a vote at that meeting, none of the 100 members of library consortia indicated that OA would be a major factor in their licensing activities over the next five years.

'Someone's got to pay for this material, so I guess that was one thing in people's heads. It was a room full of pragmatists and this is what the pragmatists voted,' reported the participant.

At the other end of the spectrum, some of the roundtable participants put the figure of gold OA journal articles in 10 years' time at 50% of the total, funded through a combination of article-processing charges and/or subsidized in other ways. 'The majority of OA journals are actually not charging article-publication charges to authors. They are subsidized by governments and in other ways,' noted the speaker.

Some felt that the proportions would be less, perhaps 20-30%, due to the complexity of the environment and conflicts with institutional affiliation.

1.3 Impact of policy moves

Policy moves from national and international governmental bodies will play a major role in influencing the scale of the transition to OA. The European Union is recommending that the OA pilot within Framework Programme 7 should be extended to all the research funded by the programme¹. This programme represents around 7% of all research funding in Europe and should have a strong multiplier effect. Some policy shifts are also going on in North America.

One of the motives for such policy shifts is economics. A recent study in Denmark estimated that the cost to businesses of not having access is £1billion². Denmark is a small country, so the effects should be bigger still for larger countries. In the current economic climate, stimulating growth is particularly important. As one participant noted: 'Some of the studies on economic multipliers with OA are somewhat dubious, but money is rather sticky in flowing out to people to use in innovation. Anything you can do to get information flowing – decreasing viscosity - is seen as good thing by governments.'

1.4 Subject variation

Whether the proportion remains the same, increases modestly, or rises dramatically over the next 10 years, there is expected to be great variation by type of publisher and subject area. Concern was expressed about small professional societies, particularly in social sciences and humanities but also some in sciences, who have to find another source of consistent revenue if they do not have subscription fees. Such societies also face the challenge of charging their authors, a large percentage of whom are also their members.

When it came to subject area, some felt that the majority of OA papers would be in science, technology, and medicine (STM). In the USA, for example, the discussion around public access to publically-funded research often focuses on medicine and is fuelled by anecdotes of situations where the public has desired access to information about their own medical conditions. However, others thought that OA proportions would be more equally balanced across disciplines.

1.5 Monographs and the humanities

The roundtable also noted the potential role of an OA model for research monographs as well as for journal articles. This is an area where there is already some activity in the humanities and social sciences, as well as in other areas.

'Humanities are in crisis. If humanities scholars could publish quicker and in more flexible, cheaper formats, this might help the discipline through the crisis. Monograph publishing is unsustainable in its current form. Instead, chapters could be published as chunks under an OA model,' was one comment.

This would help, believed participants, because many humanities researchers prefer long-form narratives, despite shifts towards journal articles caused by research assessment exercises.

¹ European Commission (2012): **Towards better access to scientific information: Boosting the benefits of public investments in research**, July 2012. http://ec.europa.eu/research/science-society/document_library/pdf_06/era-communication-towards-better-access-to-scientific-information_en.pdf, accessed 27-7-12

² Houghton, J., Swan, A., and Brown, S. (2011): **Access to research and technical information in Denmark**. <http://eprints.ecs.soton.ac.uk/22603/>, accessed 26-7-12

1.6 The green and gold routes

In considering OA articles as a proportion of the total, the discussion focussed on gold OA; the group acknowledged that policies now seem to favour gold more than green. 'Green OA on its own doesn't represent access to quality-assured publications,' noted one participant, an observation backed up by figures from University College London (UCL)'s repository where, although journal articles constitute more than 70% of the content, the vast majority – 98% – consist of metadata records only. In addition, of the 2,890 full-text articles in the UCL repository as of 6 March 2012, only 46 of them were published in 2011 and only nine of the top 50 items downloaded in 2011 were published journal articles, with the top two articles published in 2001 and 2002 respectively³.

With such experiences, coupled with inadequate discoverability, OA repositories were branded by one participant as 'harmless, ineffective and expensive'. Nonetheless, it was agreed that green OA can have a complementary role and is not necessarily in competition with gold. For example gold OA articles can be deposited in UK PubMed Central.

What's more, some repositories have been very successful. Research by Alma Swan inferred that Southampton University research has a higher profile as a result of the university's deposit mandate⁴.

In addition, institutional repositories serve purposes beyond making research available. As part of the UK's research excellent framework (REF)⁵, which is the national exercise to assess the research output of UK universities, libraries are using institutional repositories to collect their institution's publications. It will be interesting to see whether, once the exercise is over, this practice continues, once academics have seen the large number of hits that their papers get by placement in their institutional repositories.

1.7 International variations

There are international issues to consider in defining the OA landscape, especially as publishers often have global coverage. For example, the UK conducts around 4% of the world's research but publishes around 6% of research papers⁶. Moving from a consumer-pays model to a producer-pays model would mean that the proportion of the total publishing costs met by the UK will increase by 50%, although this will not necessarily mean an increase of 50% in cash terms. This was noted as a big issue for major producer nations such as the UK, USA and Germany.

However, there will still continue to be a push from governments towards more openness and transparency, as OA is perceived as being more transparent than subscriptions, noted the participants.

³ Finch, J (2012) *Accessibility, sustainability, excellence: how to expand access to research publications (the Finch Report)*: paragraphs 4. 17 and 4.1 9 <http://www.researchinfonet.org/wp-content/uploads/2012/06/Finch-Group-report-FINAL-VERSION.pdf>, accessed 27-7-12

⁴ Swan, Alma (2011) *Institutional repositories - now and next*. University Libraries and Digital Learning Environments (eds Penny Dale, Jill Beard and Matt Holland). In press, Ashgate Publishing <http://eprints.soton.ac.uk/271471/>, accessed 26-7-12

⁵ For further information about the REF see <http://www.ref.ac.uk/>

⁶ Elsevier (2011) *International Comparative Performance of the UK Research Base: report for the Department of Business, Innovation and Skills*, 2011. <http://www.bis.gov.uk/assets/biscore/science/docs/i/11-p123-international-comparative-performance-uk-research-base-2011>, accessed 27-7-12

2. The impact of open access on future research, teaching and learning

2.1 Research

OA will have an impact on researchers both as authors and consumers of research information. When it comes to publishing papers, the roundtable participants observed that researchers will do what their funders require them to do, an observation that echoes the predictions about policy shifts impacting OA take-up. However, it was felt that researchers will only comply with OA demands from funders if there are consequences of not complying. Even then, compliance with the National Institutes of Health (NIH) mandate in the USA is less than 100%, despite researchers theoretically getting no further funding if they don't comply. This may result from a lack of awareness of OA in institutions. UK universities don't always know the extent of their research outputs, let alone how much of this is OA.

The group was divided over whether OA favours junior researchers. Some felt that young researchers will try to publish in any way possible, while others thought that younger researchers are at a disadvantage because they have fewer sources of funding. However, another participant noted that most researchers do not have to make that choice because they can comply with mandates through green OA.

One of the ways that OA will affect researchers as consumers of information is in the area of text mining, although some noted that text mining is more likely to push copyright reform than OA.

In terms of accessing papers to read, there was not felt to be a significant lack of access currently for researchers or students in many of the institutions represented. As one participant put it: 'In the worlds we inhabit there will be changes, but much fewer than for countries in transition. If you want something you'll get it, but the rest of the world is not like that.' She added that OA presents an opportunity for emerging-nations' researchers.

2.2 Teaching

A trend that the panel noted is the increase in institutions setting up offshoot campuses in different countries and the challenge that students in those countries currently have, experiencing different access conditions from those of students in their parent institution. This is an issue that some universities with close links to further education colleges find as well. Current subscription models don't really support these situations, but moves towards OA will help students across affiliated institutions secure access to the same materials.

2.3 Learning

For students, OA fits with the culture of openness that young people already experience through platforms such as Facebook, said the panel; although this phenomenon, as one participant noted, is most prevalent amongst people who are not earning yet.

OA will enable students to get information very quickly, sometimes enabling them to find information before their tutors. Social networking will play a significant role in interacting with OA content for students, predicted the group.

2.4 Discoverability

For both research and learning, it is not just access to content but access to discovery tools that is important. One participant noted that students already use Wikipedia as a jumping-off point. Although they know it is not always accurate, they know that there may be links to peer-reviewed articles at the end.

OA discussions play a role here because, believe the participants, recommender systems are more likely to lean towards freely available information, because there are no barriers.

3. Impact of OA on academic and research library services

The roundtable recognised that libraries play key information access roles in their institutions. These roles include collection development, managing subscriptions budgets, providing advice on information access, managing institutional collections, and reporting on usage of resources and services. As OA grows, these roles will remain important but will shift in emphasis and the ways that they are carried out.

3.1 Institutional collections and discovery

The more content that is available as OA, the less importance is seen for having institutional collections. A comment was raised that there should be an exploration of attitudes relating to this in more detail. However, as the quantity of information that can be accessed grows, discovery systems become more important.

As one person commented: 'We still want to provide quality-controlled, relevant information for our community.' However, there was discussion about whether or not users want librarians telling them which are 'good' OA resources and which are 'bad'.

Participants agreed that a large part of the librarian's role is about information literacy and mediation of information. The core will remain the same whatever model is involved.

As one participant observed, information access has always been limited and selective. 'We've always had filters – they are called budgets,' she remarked.

However, there were words of caution for librarians in assuming that users will use the library to help filter OA content: 'We have to avoid being taken in by our own rhetoric. Lots of people go to Google and look at the first half dozen entries,' was one comment, with another speaker noting that Google has become very good at that role.

'We have to admit that the best discovery systems aren't library ones,' noted one participant. 'Working towards OA puts us out of one of our main jobs but the purpose of the library isn't to secure the job of the librarians,' he continued.

Nonetheless, librarian participants felt that they have a key role to play in OA and recognised the need to adapt to continue to be genuinely useful to users.

One way that this happens is that in many institutions libraries are in charge of institutional repositories. The library role is evolving to providing licensing and related advice to support OA. Some libraries have also begun to provide overlay services.

3.2 Providing advice

A key library function is providing advice to researchers and students. 'It's very important in talking about information literacy to know who you are talking to,' observed one speaker.

The advice required differs depending on the type of research being carried out. 'A research library is more like a research assistant,' observed one participant.

However, scale is a huge problem for libraries that want to provide expert advice on a one-to-one basis when there are a small number of librarians and a large body of students. One participant noted that meeting this need requires thinking differently about the process of providing advice.

When it comes to teaching and learning, students may be interested in what other students are reading, especially those who are doing well. A recent JISC project revealed a correlation between use of resources and degree class⁷. However, the project only recorded who has downloaded or borrowed materials, not whether they had actually read them.

Recommender systems will play a key role in library engagement. However, it was noted that they do not necessarily need to be institution-specific but could be done on web scale.

⁷ <http://library.hud.ac.uk/blogs/projects/lidp/>, accessed 13-8 -12

4. Effects of open access on budgets

4.1 Library budgets and OA

There was a feeling that library budgets will be reduced as a result of OA, although this depends on what happens higher up the chain in funding reviews.

It was acknowledged that, in the UK for example, there are two streams of funding for research institutions: general institutional funding; and funding for specific projects. In general, libraries are supported by the former. A shift from consumer-pays (from a library budget) to author-pays (potentially from a research budget) has implications for the balance of funding in the institution.

How library funding will work out is hard to generalise, however, as there are variations between countries and even plenty of variation between different types of institutions within the same country. In the roundtable discussion, there were clear differences between old UK universities and those formed post-1992 in terms of funding distribution; in the older universities different academic departments tend to determine funding for services such as their libraries, while in the newer universities all funding is top-sliced to support central services such as libraries.

Policy decisions will have an impact on funding as well. As one UK-based librarian observed, 'Government policy in the UK seems to support OA but we've not seen any more money. They have said "We're happy to work with institutions to set up funds", which effectively says that universities need to pay.'

4.2 Managing OA budgets

To what extent the library will be involved in managing OA spending for article-processing charges and repositories was also discussed. 'I suspect there is still a lot of discussion to be had about whose job that is within universities and it might well be part of the library's job or it might turn out not to be,' noted one participant.

One of the concerns was the unpredictability of funding gold OA charges. With subscriptions, libraries can plan purchases at the start of the year, but it is very difficult to determine how many articles authors will want to publish as OA and how much they will be charged for them.

In addition, the distribution of costs differs in an OA model. As one participant noted: 'With gold OA only the people whose papers are accepted pay so the most successful authors have to pay more.'

One option offered by some OA publishers is for institutions to pay a membership fee to cover all article-processing charges for a year. As one participant noted, this becomes similar to managing subscriptions, a task that librarians are already accustomed to doing.

Nonetheless, in a transition period between models and where budgets are tight, librarians felt that asking their institutions for large additional budgets for memberships to, for example, BioMed Central, can be a challenge.

'We do pay BioMed Central (BMC) fees and quite a high proportion of the papers have no visible source of funding. If we look at the cost per download of BMC journals, it would be very high,' was another observation.

A concern was also raised about article-processing charges sometimes coming from researchers' own pockets. However, another participant pointed to a funding sources survey that their institution had done with CERN and BioMed Central. This survey found that some researchers pay out of their own pockets but most do not⁸.

Some libraries have created funds for gold OA, although these often exclude funding for hybrid journals. 'It's a natural thing for libraries to manage OA payments,' was one comment.

However, not all institutions see OA funding as the library's role. 'We took a conscious decision with PLoS to let faculty arrange payments directly. If research funders are paying researchers, then it makes sense for researchers to foot the bill directly. Why add a convoluted extra layer?' explained one participant.

⁸ Figures on these issues are available from the SOAP project website <http://project-soap.eu/report-from-the-soap-symposium/>, accessed 27-7-12

5. Managing the OA process

Linked with the idea of managing budgets is that of advising and educating researchers about OA. 'If they don't perceive how many subscribers a journal has, then authors will go for high-esteem, low-subscriber-number titles every time,' observed one participant.

This can be a challenge for researchers who do not see access as a problem and do not want to be told where to publish. In institutions with a more centralised structure, it is easier to mandate and manage OA where there are centralized policies and mandates, it was felt.

Libraries often favour OA as a reaction to high journal subscription prices. When libraries drive OA, they also need to provide solutions, said participants. Many libraries have already been hosting and promoting institutional repositories for a long time. One enabler for this that has been that the institutional repository movement started around the same time as demand for traditional document delivery services dropped (due to factors such as the "big deal"). This meant that libraries could use existing staff and resources to try out repositories.

6. Skills and capabilities that librarians require for OA

6.1 Communication

Communication skills are very important for librarians in an OA environment. Challenges arise from many researchers still having negative perceptions of the concept of paying to publish equating to vanity publishing and therefore the results being of dubious quality.

'To explain the difference between vanity publishing and gold OA to someone who isn't steeped in this stuff and talking about it all the time can be an uphill battle,' remarked one participant. 'Part of the obstacle is communicating what OA means. If the people who are engaged with OA all the time can't agree on what it means, then how are we going to communicate it to researchers?'

'We have to plant seeds. If they don't know about it they aren't going to do it,' added another participant.

Another challenge with providing advice on OA is that researchers do not want to be told – or even think they are being told – where to publish. This requires careful communication. As one speaker put it: 'It's about learning to speak the language of users.'

6.2 Relationships

In communicating about OA, relationships with all departments is a key strength of libraries that other academic functions do not have. Research offices, for example, are typically much smaller and more narrowly focused.

One participant commented that there was a disparity between who IT staff and who management staff think can best manage repositories. IT staff thought it should be themselves, but university management felt that libraries are best placed for the task because of their relationships within the institution. Librarians also understand the need to think about user behaviour.

Another trend will be the emergence and requirement to manage new types of resources. Skills in management, information literacy, and understanding how OA links with the broader information chain will be very important.

6.3 Tools

Tools to manage the OA process will also be important. One example raised was Open Access Key. This would be like a subscription agent for OA funding and could be done on a country-wide basis, noted one speaker.

6.4 Metadata and the web-scale

Skills that librarians already have should also help in an OA environment. In particular, skills in preservation and linked data will be needed. Managing metadata will also be very important in an OA landscape.

Such tools should be able to help people find information. ‘Nothing’s worse than Amazon or Google metadata,’ commented one participant, noting that the requirement of metadata is to be able to distinguish between versions.

However, OA will change the way that this is done: ‘We will have to forget about traditional cataloguing and create web-scale metadata,’ was one comment.

Preservation is also going to have to be done at scale, noted another speaker. But it’s not just services and tools; with the rise of OA collections of commodity journals and books are going to be available on a web scale too.

Scaled up OA also challenges the traditional role of collection development for librarians, and it raises the question of how universities can compete with each other on the basis of their libraries if the resources and tools are almost the same. One participant noted that the quality of library provision will be one of the benchmarking issues in the future, rather than the number of books or journals that a library holds.

6.5 Working together and sharing

As more content becomes available without barriers across the web and services become web scale, the next question is how individual libraries fit into this picture. Some librarians at the roundtable are already speaking with others in neighbouring institutions about how to, for example, share subject librarians or share repositories. Licensing content across consortia is another long-standing example of working at scale. Such moves can reduce overhead costs and help librarians focus their energies on providing advice to users.

‘The concept of the individual library is going to go away. We are going to have to work together,’ suggested one speaker.

This collaboration can go beyond the library sector too. As one participant put it: ‘We collaborate and do strategic partnerships where it makes economic sense.’

6.6 Other challenges

The roundtable recognised some other library challenges that will accompany changes caused by OA. One big issue involves changes in the academic sector in which both private entities and other educational institutions offer degrees, often at lower costs. OA, combined with the availability of existing library services at established universities, helps entry to the market for these new low-cost institutions.

Nonetheless, there could be some benefits to be recognised in pared-down models of delivering courses. ‘We always argue that libraries add value, but maybe we are not creating the value that users actually want. We don’t like recognising that what we do may add unnecessary value,’ was one observation.

Another challenge in a changing education and information environment is the ability to be creative and even radical. ‘I don’t see libraries as very radical,’ admitted one speaker. Others agreed, noting that traditionally librarians chose their profession because they wanted a quiet life and because they liked being with books rather than people.

7. Defining library strategies

A way to deal with information changes and - perhaps outdated - perceptions of libraries is to develop strategies to remain relevant as the nature of information and information access changes.

This, in itself, can cause conflict, with some speakers noting that libraries are expected to be part of their institution's strategies rather than to develop their own. Participants agreed that there are some specific information issues that need to be addressed, whether as part of library or institutional strategies.

In defining information strategy, participants agreed that there are plenty of national and institutional bodies doing work in this area. One example is LIBER, which working across Europe⁹. In addition, bodies like UKSG and CILIP bring publishers and libraries together.

The view on availability of resources to help with strategies is summed up by the quote: 'There is little shortage of guidance from bodies. Lacking are mechanisms to help libraries come together and with other information intermediaries.'

8. Publisher relationships

The panel observed that libraries probably underestimate the costs that go into the publishing side. What's more, commercial publishers need to give their shareholders a return on investment, which 'muddies the waters' when it comes to considering OA.

There was a prediction that if the whole system changed to OA, the system in total would be cheaper but costs would vary considerably by institution.

There are also differences between countries. This was illustrated by the comment from a librarian in the Middle East, who explained that in his region people want to stick with the paid subscription model. The reason is that the amount of institutional research going on is still small, and so information polices at national and regional levels are still not strong. He favoured maintaining the traditional model for R&D before adapting to a new model.

9. Plans in an ideal world

With so many questions about what will happen with budgets, the roundtable considered what might happen should libraries suddenly have more money in their budgets thanks to reductions in subscription prices.

Although many had commented earlier in the discussion on the need to reduce book-buying due to budget constraints, there was no particular enthusiasm about spending extra money on buying many more books.

Instead, participants favoured spending such a hypothetical windfall on digitizing and analyzing metadata for the unique special collections that many libraries hold. As more widespread resources become a commodity with OA, unique collections of, for example, letters from a particular historical period or written by an eminent author or scientist, are seen as important strengths of libraries. Making available and discoverable such singular collections will be valuable for scholars. Librarians at the roundtable were willing to consider working with publishers on such projects.

'We've collected materials so people can read them. The challenge is to make unique materials widely available in the digital world,' was one comment.

⁹ For further information about LIBER see <http://www.libereurope.eu/>

10. The library's future role

OA will certainly change the situation for libraries and their users. Whether it makes them more or less valuable to their institutions and users depends on whether libraries take action to make themselves more useful.

There was a general feeling that borders are blurring between teaching and learning, and the traditional role of the library as an institution is also blurring. The focus will instead shift to the information professional. As one participant put it: 'the information professional is the library of the future.'

Conclusions

Open access is becoming more important as a way of communicating research findings, particularly driven by strong policy moves in Europe and to some extent in North America.

Academic libraries and research communication will change as open access grows in importance. Some of libraries' traditional roles will be reduced and others will need to change, but libraries still have an important role to play in managing and advising on information and information-related budgets.

The roundtable discussion identified a number of key aspects of the role of academic libraries in an open access future. Libraries need to evolve and be prepared to be creative, as the ways that researchers and students access and use information are changing and will continue to change. Libraries will also play an essential role in explaining open access to researchers.

As resources become open access and therefore not tied to a particular institutional subscription, there will be an increasing trend to sharing discovery and support services among libraries and institutions. This will require greater dialogue between libraries about strategies for dealing with open access and best practices.

With a willingness to be creative and to support users in new ways through communication, collaboration and tools, academic libraries should remain an important component of the research process in their institutions and beyond.

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About the author

Siân Harris is editor of Research Information, the global publication for research librarians, information professionals and scholarly publishers www.researchinformation.info

About the chair

Simon Inger has been working in the journals industry for over 25 years, working primarily in library technology, e-journal delivery and product development. For the last 10 years he has worked as a publishing consultant working on strategic and analytical matters for types of publishers and intermediaries. In addition he runs training courses for librarians in the UK and Ireland on e-journal technology and management under the banner of UKSG, as well as courses for publishers focussed on content delivery through gateways, search engines and library portals.

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