OSI Scholarly Communication Publishing Experts Stakeholders Report

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I. Perspectives on Open Access

This stakeholder group reflects a diverse constituency including: university presses; repository managers; scholarly communication librarians; researchers; copyright attorneys; funders; and more. Indeed, we believe we embody a microcosm of stakeholders across the scholarly publishing terrain.

As professionals with shared interests in supporting a sustainable scholarly publishing lifecycle we share a perspective of OA that reflects both the need for clarity in communication about what open scholarship means and a richer underlying landscape enabling a spectrum of openness for different scholarly objects. For instance, open data may demand both a different meaning and a different timeline for achieving "openness" than open articles would. Yet, the way the scholarly community interprets "open" is currently muddled by disparate understandings of the term and stymied by the existing binary publishing framework—that is, open vs. closed.

Further, we understand that achieving a clearer and more diverse landscape for OA likely necessitates identifying proper incentives to effectuate change. Why should funders invest in creating platforms to facilitate open scholarship dissemination? Why should scholars dedicate time to deposit their work in institutional repositories if making open copies available does not bear upon promotion and tenure? Why should researchers who wish to publish articles in the future publish their data sets open now and allow others to start using their data? The value and incentives of OA can become easily obscured by long-standing concerns within academia.

Therefore, this stakeholder group shares an interest in clearly fostering and articulating the incentives for OA publishing in the hope of effectuating behavioral changes.

This necessitates:
- Establishing external prizes to reward OA outcomes (not only for researchers, but potentially also funders, publishers, and societies, etc.)
- Demonstrating and publicizing the benefits of OA for public good, social justice, and democratization

- Documenting ways in which OA has advanced knowledge and innovation
- Encouraging and locating OA collaborators (e.g. funders, publishers, and research offices)
- Appealing to researchers' and institutions' self-interests by highlighting ways that OA promotes impact

II. Areas of Agreement & Disagreement

Given the diverse nature of this group, our discussion focused on areas of shared interest and concern and how we can bring our differing perspectives to bear in a productive fashion.

The group's perspectives on author rights ran the spectrum from those concerned with encouraging authors to exercise their available rights as fully as possible to those concerned with developing tools and resources to help authors (and others) operate well within the margins of existing copyright and licensing schemes. These approaches can sometimes manifest themselves in opposition or in conflict.

We recognize the need to engage all perspectives in establishing a more balanced landscape tailored to all digital learning objects and that creates a more level playing field in negotiating power among the different parties who have an interest in maintaining and making use of certain intellectual property rights. Engaged discussion in these areas can help increase trust and understanding of what each group can contribute.

In addition, we recognize a common requirement to simplify the messaging around sharing of intellectual property, noting that data and articles, for example, may have different needs and require the establishment of different norms.

Across the various organizations we represent, OA advocates are often challenged in the degree to which they are empowered to change the culture around OA. For example, can scholarly communication officers in academia speak legitimately about where to publish? To what degree can individuals in a corporate environment encourage shifts in official company policy? In large organizations, it can be challenging to finds ways to be involved in decision making or the implementation of systems that relate to OA. In the academic setting, the adoption of Research Information Systems can be one such example. The people charged with selecting such a system may often have priorities in mind that don't take OA issues into account.

We also acknowledged the challenge resulting from stakeholders' vested interests in aspects of scholarly publishing. These interests often shape actions (and counteractions) in the discourse and actualization of open scholarship. Our best intentions may be limited by organizational and professional constraints.

We believe it would be productive to find methods to share perspectives and experiences across these and similar issues and we tried to suggest ways in which we could approach that going forward.

III. Specific actions or outcomes to balance the needs and interests of all group members

OSI2017 is an attempt to stride forward, stepping off the "starting block" of unique cross-stakeholder discussions during OSI2016 and onto a path toward a proliferation and acceptance of openness in scholarly communication. Like any path toward attitude and behavioral change, it is fraught with barriers. Our diverse stakeholder group proposes the following actions to avoid, hurdle, or eliminate these barriers.

Establish Synergies

Agents can encourage behavior change through different appeals. The rhetoric around open access remains inconsistent and even contested, so direct appeals to participation can be challenging. We can work toward changes by manipulating the "path," the processes of scholarly communication, to make it easier for stakeholders to take part in an open ecosystem.

For example, publishers and institutional repositories could partner to build a method of synchronization that would allow the publisher to automatically share the manuscript and attached metadata with the IR upon acceptance. The growth of ORCID requirements among publishers and encouragement among research institutions facilitates this suggestion. Authors could keep an updated record of contributions, the institutions could get better data about their researchers, and the scholarly communication community would have a consistent, transparent framework instead of many systems with limited interoperability.

Representation at OSI Events

One of the primary challenges of OSI2016 remains relevant this year; author and researcher representation. They are a stakeholder group that is obviously affected by whatever levers of action we may be able to pull but it has been difficult to involve a multitude of voices that span disciplines. University research offices and upper administration can drastically impact any attempts to put proposals into action and both will need a platform going forward.

We discussed ways to change the OSI communication plan to hear more from these stakeholder groups. It is important that they have opportunities to be a part of the in-person events that are so important for building familiarity and collaboration among this diverse community. One way we propose to do this is by having OSI become a "Fulcrum Event".1 Some cross-discipline academic conferences now partner with smaller, discipline-specific meetings to help to bring attention and attendance to both that they may not be able to obtain separately. OSI could reach out to research communities to propose synchronous meetings and provide increased researcher participation in the meeting.

Explore a Fellows Program

OSI's interstitial position can make it an ideal partnership catalyst for scholarly communication. As identified by several workgroups in OSI2016 and OSI2017, one of the challenges of communicating between the "silos" of scholarly communication is that the "producers," like researchers, are unfamiliar with the culture of "providers" or publishers and vice versa. A fellowship program that facilitates an exchange of individuals between these silos could provide valuable insight and experience to begin bridging these cultural gaps.

Given that some university presses now exist as administrative units of their institutions' libraries, there could be natural opportunities to facilitate this type of communication flow.

Establish a more balanced author rights ecosystem and options for author choice

As experts from our group effectively reflect all stakeholders within scholarly publishing, we were keenly aware of an imbalance of influence regarding how the final product—the scholarly publication itself—can be shared. There are potentially competing interests, such as those between authors, publishers, and readers, about managing copyright and licensing works for reuse in an open framework. Authors may wish for a more robust set of choices within the general framework of "open" to license their data or publications for reuse—yet typically are given little if any opportunity to select from licensing options when signing a publication agreement. Moreover, some publications are "open" in the sense that they are readable without access but are not "open" for re-use and remain protected by copyright held by the publisher. This often results in a binary approach to rights management—either the work is licensed, say, with a CC-BY license, or copyright is reserved entirely by the publisher. Diversification of rights management options would foster greater balance within scholarly publishing.

Be Ambassadors to Our Own Groups and Facilitate Stakeholder Engagement

The unique makeup of this stakeholder group may be an opportunity to address one of the communication barriers that OSI faces. It is difficult to monitor the conversation of such a diverse collection of stakeholders, to say nothing of curating, organizing, or participating in it. We could each serve as community ambassadors for our respective silos, offer our perspective to the OSI exchange of ideas, and bring ideas found there back to our communities. In addition, these ambassadors can seek efforts and ideas that overlap with other stakeholders, which are prime opportunities for collaboration and engagement.

References

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