IFLA satellite pre-conference: open access to science information: trends, models and strategies for libraries

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Article begins on next page
Conference Report

IFLA Satellite Pre-Conference

Open Access to Science Information: Trends, Models and Strategies for Libraries

IFLA Sections: Science and Technology Libraries, Health and Biosciences Libraries

August 6-8, 2010

Chania, Crete, Greece

Conference held at the Mediterranean Agronomic Institute of Chania (MAICCh)

Open access has been discussed throughout the library world for a period of years. Those librarians vitally interested in analysis of this topic, and fortunate enough to attend the excellent IFLA pre-conference held in Crete, surely came away with food for thought. Where can one find a discussion of open access held in smaller setting, but with colleagues from sixteen countries, and most importantly, a real variety of stakeholder perspectives and viewpoints? In my years of seeking to understand the implications of open access for libraries I have sought out, but have never quite found the variety of perspectives offered at this IFLA pre-conference. A roomful of participants including practicing librarians, LIS faculty, doctoral students, library administrators, a commercial publisher, a gold open access publisher, a repository manager, a representative from Wikipedia, authors, a researcher reflecting on a lengthy career, a computer engineer and many others. Besides listening to various viewpoints, the ability to hold a discussion that takes into account a global perspective around the various issues that comprise “open access” made the conference especially informative. With a smaller group focused on a single topic, even coffee breaks proved a time for exchanging ideas and library strategies. The participants all seemed to have sufficient background knowledge about various open access topics and that allowed discussion to flow easily throughout the conference.

The conference was held in an irresistible location, the city of Chania in Crete, Greece. The venue, the MAICCh (Mediterranean Agronomic Institute of Chania), provided a conference setting that was welcoming and facilitated discussion. The Conference Chair, Anthi Katsirikou of the University of Piraeus Library had developed a program that covered all of the various aspects of open access while allowing time for participants to learn from each other. Dialogue was facilitated because all of the the participants attended each talk together. The conference included some interesting side trips, such as to a Minoan ship museum, an archaeological museum and the palace at Knossos.

After the opening remarks, the program began with Anthi Katsirikou discussing “copyright and creativity.” One of the takeaways from the conference was the need for librarians to understand
copyright as it exists across the globe, and to suggest that IFLA make available information on its website about copyright from a variety of countries. It is imperative to understand the restrictions and value that copyright confers, and how that differs by country and region. The following report details some selected conference presentations.

There can be no discussion of open access without discussion of the institutional repository. There were many informative presentations of unique repository implementations. Katalin Miszori, computer librarian from Szent Istvan University, Budapest, Hungary described the building of a repository in a special library using the “ePrints” system. This presentation was followed by presentation of case studies of the repositories of Transilvania University of Brasov, Romania and the University of Crete. At the University of Crete, there has been a focus on the university’s output of grey literature. Institutional output of this type of literature is a prime example of unique material that can be captured in a repository, and shared widely through open access. The presenters, Manolis Koukourakis and Angela Repanovici focused on integrating the repository with relevant services, and forging a connection with faculty and departments in a comprehensive approach to promotion and acceptance. Marketing and integration with the OPAC and metasearch portal was also mentioned. The University of Crete Digital Library can be viewed at http://elocus.lib.uoc.gr. The first open access repository in Romania, a DSpace implementation, hosts already published material and has brought scientists together. These presentations also discussed how to choose a repository product, and how to effectively market the service.

Other presenters focused on implications of open access on public services and library users. My presentation explored the implications of the integration of open access resources and principles on “front line” reference and instruction work in the library. Often, reference and instruction are not a prominent part of the discussion of libraries and open access. The real success of open access in the broadest sense may only happen if public services librarians integrate materials that are “free to readers” into all reference and information literacy initiatives. Library schools may also be focused on traditional collections, without including knowledge of open access materials, in the teaching of library public services topics and the training of new librarians. Many libraries have worked in both large and small ways with Second Life. Natassa Tsoubrakakou and Panorea Gaitanou’s paper discussed the use of Second Life in information literacy work. It was pointed out that libraries have always been social spaces, and that now worldwide collaboration is possible. Second Life can be a way to showcase open access. The Bavarian State Library tour on Second Life was presented.

Following a delicious lunch of fresh Cretan delicacies, an introduction to the afternoon was presented by Gordana Stokic Simoncic of Belgrade University and entitled “Open Your Mind, Open Your Line=Open Your Society. The importance of libraries and open access principles to the continuing development of a knowledge society in the Republic of Serbia through repository development, open access publishing, and other open initiatives is of utmost importance to a knowledge society. Mirjana Brkovic’s presentation on academic authors’ scientific publishing
using open access strategies detailed pros and cons of open access for authors in terms of factors such as copyright, preservation, and survivability of repositories. Brkovic compared and contrasted the variety of open access choices, and discussed research findings from a survey of professors in Serbia. Potential obstacles to self-archiving and open access publishing were detailed. Ana Ivkovic discussed new online technologies employed by scientists -such as blogs and portals, and especially use of various social networking tools such as Twitter and Facebook. Ivkovic’s talk, from a medical library perspective, served as a reminder that different communities have very different needs when it comes to the research literature. A reminder was also issued that “free” software, while defined as “freedom to distribute, study and modify copies,” is not necessarily free in terms of cost. In the medical arena, audio lectures and podcasts prove particularly useful. There are lots of free tools that librarians can utilize with their user communities, and promotion of “open social networks” is important. Zoran Zdravkovic contributed a paper on “Open Access and Web 2.0 Convergences.” Many presenters discussed social networking tools and the importance of global collaboration in scholarly communication.

Quite a few presentations focused on other global issues surrounding repository development and maximizing use of these important institutional resources. Xantal Romaguera and Carmen Reverte presented “An institutional repository project as an organizational change vision in IRTA (Institute for Food and Agricultural Research and Technology, Catalonia).” A repository for IRTA is being developed, citation information is being analyzed with Google Scholar, Scopus and Web of Science, and implementation is slated for 2010. The presenters stated a desire to participate in exchanging information and collaborating with other agriculture and food technology repositories.

An important use of repositories is for preservation and gathering together of materials related to local and unique heritage resources. To showcase digital documentation and preservation of a particular heritage resource in Indonesia, Liauw Toong Tijek (Aditya Nugraha) of Petra Christian University discussed the “Surabaya Memory.” Courses are using these materials as teaching and learning resources. A digital and physical collection can be built at the same time, and wide public participation in collection development and associated activities can be a feature. Preserving and organizing such an important unique local collection is a primary use for an institutional repository (http://surabaya-memory.petra.ac.id).

Following the university implementations discussions, Claire Bundy of BioMedCentral discussed the option available to develop a repository using the “Open Repository” system which uses the DSpace platform. This is just another example of an alternative solution for any library that might prefer that another entity develop, market and support its institutional repository. Developing a repository in-house may require hiring developers and managers and maintaining a server, all of which requires time and resources. A hosted solution like Open Repository may make sense for some institutions. Bundy described many uses for a repository besides green open access involving articles. All scholarly works are an issue for repository developers, including grey literature, working papers, preprints, audio, video, web-based materials and data.
Also discussed was the facilitation of collaboration through the repository as well as issues surrounding the UK RAE (Research Assessment Exercise). Increased visibility of scholars’ work through repository deposit is seen through large increases in citation counts and downloads.

The conference continued into its second day with a presentation of research findings conducted by Abdelmajid Bouazza and Ahmed bin Hamed AL-Sinani of Sultan Qaboos University on the use of open access journals and open archives by engineering faculty. Bouazza’s talk focused on the availability and use of these resources in the Sultanate of Oman, and the importance of continuing research on open access in developing countries. Ageliki Oikonomou of the University of Piraeus Library, Greece, discussed the high cost of academic journals, ethical and moral arguments for open access, and the importance of open access to many areas of scholarly communication. A comparison of scholarly communication patterns and institutional repository implementation in developed versus developing countries including issues of author reluctance and disciplinary difference was presented. Copyright restrictions in developing countries may prove an impediment, and lack of knowledge and different interpretations of copyright may occur. In Greece, 20 of 33 institutions have institutional repositories at present. Open access options still cannot replace subscriptions, but self-archiving can complement traditional systems.

Natalia Timiraos of BioMedCentral continued the discussion of self-archiving with a discussion of funder mandates currently in place in the USA, UK and Canada which require open access to research emanating from taxpayer funding. This is accomplished by deposit of allowable versions of articles in repositories. Institutional response to mandates is an important topic for discussion and was analyzed by Timiraos. Automatic article deposits from SWORD feeds allow easy deposit of BMC articles into institutional repositories. The various membership categories for BioMedCentral were reiterated. Grant money is funding much open access publishing in the UK.

Returning to a discussion of copyright and open access journals in Greece, Assimina Vlachaki and Christine Urquhart presented doctoral survey research on Greek biomedical publishers’ behavior related to copyright and open access. The findings indicate that nine of ten publishers allow deposit of the postprint version, but only after authors ask for permission. As an aside, some at the conference discussed the need for publishers to be more proactive in letting authors know their rights in terms of self-archiving, and that more details about Creative Commons needs to be pushed to authors. Further findings indicate that there is some ignorance on the part of researchers about both copyright and the availability of open access journals. It was concluded that academic librarians need to work with both researchers and the public about issues of open access and copyright.

The conference continued with presentations focused on publishing. Roxana Theodorou (with Ourania Konsta) of Ionian University, Corfu presented an alternative plan for institutional access to scientific information; that of libraries functioning as “coalitions of publishers through the cooperation of similar libraries forming open access disciplinary repositories.” Peer review
would be necessary, and it is felt that it would be more economical to publish refereed scientific literature out of open access repositories. Theodorou discussed many aspects of the proposed model including potential costs, other businesses using this type of approach, and the many challenges inherent in setting up the system.

A very useful segue followed with a discussion by Christos Skiadas about the importance and implications of personal choice of scholarly publication outlets over a 30 year career. Dr. Skiadas articulated the rare (for a LIS conference) viewpoint of open access publishing from the perspective of an author. The apt title of the presentation was “A researcher’s perspective; lessons learned from the last decades.” Librarians and others studying open access must remember that every decision about an outlet for individual scholarship has an effect on a researcher’s career and livelihood. Librarians may need more dialogue with faculty and other scholars and researchers to understand scholarly communication conventions and traditions that are well established in every discipline and subfield. Disconnect may result if librarians do not take into account what really matters to individuals and groups of scholars in the disciplines in terms of their publications. This was an important, thought-provoking presentation, and a good addition to any discussion of open access. Skiadas also presented a historical view of scholarly publishing across five centuries, as well as a reminder that many small countries are not represented in the global scientific system.

Following Skiadas, Michiel Kolman presented “Open Access and STM Publishing, a publisher’s perspective. Kolman, Vice President of Global Academic Relations at Elsevier Amsterdam provided a view of the contributions of a commercial publisher in terms of a variety of universal access initiatives. Discussions between commercial publishers and librarians working on open access are somewhat rare and may at times be contentious, but dialogue leads to greater understanding of the work of both publishers and librarians. Kolman discussed implications of the coming group of young graduate students making up “Generation Y,” and the findings of the JISC/British Library study entitled “Researchers of Tomorrow.” The various investments in the system of scholarly publishing, peer review, and the dissemination of scientific information on a global scale and sustainability issues were discussed. After this presentation of issues from the perspective of a large STM commercial publisher, the audience switched gears to hear about “Open access electronic publishing services in academic libraries: the case study of University of Patras” presented by Despoina Gkgkou (with Panos Georgiou and Tsakonas Giannis). The library as publisher is of great interest to the open access conversation, and audiences are eager to hear about investment, potential for success, and sustainability of these new library initiatives. Since 2007, the University of Patras’s Library & Information Center (Greece) has been experimenting with publishing via “Pasithee,” an e-publishing platform of scientific journals (xantho.lis.upatras.gr/pasithee/) and “Dexameni,” a scholarly archive of backfiles of Greek scholarly journals (xantho.lis.upatras.gr/dexameni/). Pasithee hosts three journals currently. Both platforms are using the OJS (Open Journal Systems) e-publishing system. Future business plans point to the continuing interest in use of these platforms in Greece, and the commitment to
continue to support institutional scholars at University of Patras (a Berlin Declaration signatory, SCOAP3 supporter, and BioMedCentral supporter).

Another section of the conference focused on “services and technology” in terms of open access. Dominic Tate discussed the importance of the repository manager to the evolution of open access, and efforts of repository managers to develop best practices and to focus on collaboration. This presentation, “Sharing Best Practice-Support Networks in the United Kingdom,” focused on issues inherent in Tate’s role of “SHERPA Repository Development Officer” at the University of Nottingham. The role of UKCoRR (The United Kingdom Council of Research Repositories) as the “professional organization for UK open access repository administrators and managers” was detailed. This organization goes the extra step by supporting the repository manager as a vital professional in the institutional open access effort. Repository managers, through collaboration and leadership opportunities, are developing best practices in the UK and beyond. Tate also discussed the importance of other interrelated repository initiatives across the UK such the “Repositories Support Project (RSP),” the “Welsh Repository Network (WRN),” and the “ERIS (Enhancing Repository Infrastructure in Scotland).” Sho Sato, of University of Tsukuba, Japan reported on “ZS Project: Zoological Science Meets Institutional Repositories,” an important study of a disciplinary approach to the study of the affect on citations and e-journal usage that results from article deposition in institutional repositories. This study focused on articles published in the journal “Zoological Science (Zoological Society of Japan)” and the results in terms of e-journal use and citation impact once those articles were deposited in the institutional repository. Researchers are continuing to study citation impact as well the effect of self-archiving on the use of e-journals.

Turning to issues of health information dissemination in Africa, Maria G.N. Musoke and Sara Mbaga of Makerere University, Uganda (the oldest university in East Africa) discussed how a focus on open access can assist with access to healthcare information by workers in remote areas. Librarians are involved with outreach and conduct workshops for all categories of health workers. Librarians are ensuring that available medical information resources are reaching into the healthcare system of Uganda. Musoke also answered questions about African Index Medicus, available as an open access resource from the World Health Organization (http://indexmedicus.afro.who.int/).

Not to be forgotten in the discussion about information access, the conference also included a presentation and discussion of “Technology trends, requirements and models for providing sustainable technological support for libraries in an evolving environment.” Authors of this paper were Panagiotis Stathopoulos, Nikos Houssos and George Stavrou. Not often discussed, the information technology (IT) issues facing the open access movement are of utmost importance and often involve those in non-librarian roles. This important presentation covered issues such as virtualization, sustainability, open source solutions, and a move toward use of cloud computing, especially the “software as a service” options for libraries (exemplified by Koha and Evergreen). A further point was that libraries should not be restricted or confined due to a lack of IT.
solutions. Privacy issues must also be examined. Open access development does require sufficient technological support systems and the feasibility, availability of expertise, and economics inherent in any library’s expansion of services may provide challenges.

“Mapping the Intellectual Structure of (the) Open Access Field Through Co-citation Analysis,” a paper by Guleda Duzyol, Zehra Taskin and Yasar Tonta of Hacettepe University, Ankara, Turkey followed. Taskin presented research on the evolution of the whole topic of open access as a research field. A study of bibliometrics, scientific visualization techniques, co-citation analysis (using CiteSpace) and a mapping of the intellectual structure of open access as a field involved research on 281 articles about open access that appeared in the professional literature from 2000-2010. The most highly cited articles and individual authors were detailed, along with a listing of the journal “Learned Publishing” as the most cited publication by authors writing on open access. The authors’ study points to the fact that open access is an emerging research field of its own.

The presentation entitled “Managing Content Quality in an Open Collaborative Environment: Health Science Articles on Wikipedia as a Case Study” was an excellent addition to the program. Unfortunately, time ran short for the question and answer period for Ariel Glenn’s discussion of a favorite topic of librarians, Wikipedia. Ariel Glenn, a software developer for the Wikimedia Foundation in San Francisco, California, USA, discussed the workings of the Wikipedia editing community and the issues involved in quality management- particularly in terms of health-related articles. Use of Wikipedia, its effects on the encyclopedia market, its credibility issues, use of the resource by doctors, its collaboration with NIH on writing articles, and especially the “banning” of use of the resource from some schools were many of the topics that librarians could’ve discussed long into the afternoon. Wikipedia’s 250 language editions and many open access links (to scholarly sources) make it an important global resource for citizens seeking content. Hopefully, more conferences that focus on open content and the evolution of certain publishing markets and traditional sectors will include discussions of popular web resources that have seemingly transformed the public’s information seeking behavior. With discussions of open peer review starting to crop up in the literature, the success of the collaborative editing feature of Wikipedia will surely be of great interest.

The final talk in this conference, focusing on books, another important category of open access materials, was entitled “Book collection’s improvement according to cost, users’ satisfaction and users’ demands” was presented by Aristeidis Meletiou of the Technical University of Crete. Meletiou presented a framework for evaluating and improving library book collections. Collection of data focusing on cost, user satisfaction, loan needs and demands for new materials allows librarians to match user needs with available budgets. Discussions of books needed by users can continue to include open access solutions as more public domain book materials move to the open web.
This IFLA Satellite conference held during a summer week in Crete was a great success. The focus on the single (although complex) topic of open access allowed for an unusual focus which was enjoyed by participants. The conference truly had a global focus, and served as a wonderful learning opportunity for attendees. Chatting over Greek pastries and Cretan Tea at the Mediterranean Agronomic Center, or during the excellent post conference dinner on a small side street in Chania, the talk turned to open access and its effects on the libraries and citizens of all of our countries. The conversation will surely continue.