Opening up the Library: Transforming our Policies, Practices and Structures

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Abstract

Momentum is building in the transition to open access for monographs, with a number of funders developing policies and mandates in recent years. The article argues that while libraries play an instrumental role in driving a transition to open science within their institutions this is not reflected in libraries' approaches to collection development, which are still predicated on purchased content. Libraries are keen to demonstrate that their purchased content is relevant to users, often promoting 'expensive' purchased collections over open content. Rather than relegating open to a less-visible second place, the article calls for libraries to acquire and promote open content alongside, and where appropriate with higher priority, than paid-for content. In order to facilitate a transition to open access for monographs, cultural change and leadership is required within libraries to reimagine

themselves around open content as the norm, with policies, practices and structures that communicate, enable and promote this shift. The article calls for a collaborative international approach.

Keywords: Open access; ebooks; monographs; libraries; cultural change

1. Introduction

Libraries have played an important role in facilitating the transition to open scholarship within their institutions: providing advocacy, advice and support for funder open access policies, and developing research data management and open scholarship services.

However, much of this support for, and attention on, open access has been focused on journals. Unlike journals, monographs are still predicated on print having not yet passed the tipping point in a transition to digital (Johnson & Luther, 2007). It is therefore unsurprising "that there is still much to do on open access books" (Holzer et al., 2020). This is never truer than in the library supply chain. Open is not embedded into the culture, workflows and practices that form the book acquisition process.

The transition to open access for monographs in Europe has moved forward slowly but steadily, with just a handful of early adopters in Austria, the Netherlands, Switzerland and the Wellcome Trust in the UK. The Swedish Research Council has also signalled the intent to extend its policy to monographs and book chapters at a future date. In 2019, an unprecedented number of reports and briefing papers were published on open access monographs and books (Adema, 2019; Fund et al., 2019; Grimme et al., 2019; Kember, 2019; Pyne et al., 2019; Science Europe, 2019; UUK, 2019a,b; Wennström et al., 2019). In addition, Knowledge Exchange's work on open access monographs culminated at the 2019 LIBER conference with a call to action for libraries, publishers and funders (Adema et al., 2019), which was more clearly defined in a 2020 blog post (Holzer et al., 2020).

Momentum is now gathering. In June 2020, the Dutch Research Council (NWO) announced its renewed policy for open access monographs together with a funding scheme (NWO, 2020). This will be followed in 2021 by a new

monographs-inclusive policy from UK Research and Innovation (UKRI, 2020) and cOAlition S guidelines on their policy regarding open access monographs (cOAlition S, 2019).

In this paper, we ask whether library acquisitions units are ready for this increase in open access content, and address the cultural changes that may be required. The paper is based on a series of workshops leading up to the 2019 LIBER conference. Since then, the COVID-19 pandemic has had a significant impact on libraries and access to collections. Many were forced to close for an extended period, with print collections shut off from researchers and students. Many print monographs were simply not available as ebooks and could not be digitised by libraries. Although some publishers provided temporary access to their collections, including monograph publishers (e.g. Brill, 2020), this free access has largely been curtailed. We are now entering a period of unparalleled uncertainty, with many libraries modelling drastic budget cuts, at the same time as having to provide support for a mixed model of teaching and research, where online access will dominate as a necessity. The authors of this paper argue that a move to open access (for books) is more urgent than ever.

While libraries have absorbed open scholarship activities into their remit, the teams that support this area are often specialist and may not be integrated with longer-established collections management and acquisitions teams. As open content becomes an increasingly significant proportion of scholarly outputs, the authors argue that libraries should be rethinking their organisational structures and collection management and development policies, at both institutional and national level, to redress the balance between acquired and open access content. Furthermore, this paper recommends how these issues should be explored and addressed in academic libraries, at both a strategic and practical level.

Comments from practitioners were gathered at a workshop held at the 2019 National Acquisitions Group (NAG) collection development meeting (Thompson & Stone, 2019a,b). Input has also been collected at the strategic level, via the 2019 Research Libraries UK (RLUK) conference (Ball & Stone, 2019) and 2019 LIBER conference (Ball et al., 2019). Comments from all three sessions have been combined and expanded to identify the strategic approach required as a sector. The paper concludes by considering this at a European

level and the potential role for sector organisations such as LIBER to support cultural change.

In this paper the terms open access books and open access monographs are used to mean long form scholarly works (usually around 70,000 words). These works may be written by a single author, joint authors or could be an edited collection.

2. Background

Key studies on open access monographs have shown that open access has a positive impact on usage, discovery and dissemination (Ferwerda et al., 2013; Montgomery et al., 2017). However, a recurring problem for the growing number of New University Presses (NUPs) and library- and academic-led open access monograph publishers is that of library discovery, particularly in the traditional library supply chain – the channels that library acquisition departments use to buy print and ebook content.

Some of these issues centre around metadata quality (Adema & Stone, 2017; Neylon et al., 2018). However, the obstacles that open access publishers face in accessing the library supply chain are much wider. For example, Rupert Gatti of Open Book Publishers commented that it would be helpful to have a service that "looks at how to bring academic content into the catalogues and the digital learning environments of the universities and to allow universities to also relate back to the publisher, so that there is a flow of information going back both ways" (Adema & Stone, 2017). In the United States, the Mellon-funded *mapping the free ebook supply chain* report found that workflows were designed to lock down, not open up books, that the amount of open access content was still small and that there were unresolved questions about sustainability and lack of awareness (Watkinson et al., 2017). Furthermore, Grimme et al. (2019, p. 11) observed that there is little incentive for commercial intermediaries at the centre of the supply chain to make a free or open access version of a book available to libraries who may buy the print copy.

Jisc's 2018 community workshop (Stone, 2018) surfaced some of these issues with key stakeholders from NUPs, academic-led presses, book suppliers and distributors, metadata suppliers, libraries and other experts in open access

publishing. Delegates discussed the problem statement that *OA publishers have difficulty accessing the channels that library acquisition departments use to buy print and ebook content*. The workshop identified a number of themes (metadata; the library supply chain; and non-traditional monograph output), which projects, such as the Research England and Arcadia Trust funded Community-led Open Publication Infrastructures for Monographs (COPIM) project (COPIM, 2020) and Jisc's Plan M project (Grindley, 2019) have begun to address.

Cultural change in the acquisitions process was the fourth theme identified in the Jisc workshop. This theme was also explored in discussions on how best to integrate open access books into the collections of academic libraries by LIBER's Open Access Working Group, which held a workshop in June 2019 to address the support required by libraries to make open access books more visible and to raise their profile (LIBER, 2019a,b). A survey of European libraries carried out by the working group showed that while many libraries are now including open access books within their discovery systems (80%), fewer are proactively requiring providers to include open access content in their services or products (42%). This demonstrates that although there is an acknowledgement of the importance of including the discovery of open access content within libraries, this still exists at only a passive level.

There is not yet a coordinated proactive approach to engage with suppliers in order to reposition this content as an essential part of the scholarly communications ecosystem. The LIBER survey also showed that while libraries are actively supporting researchers with publishing their own monographs via open access, they are not systematically considering open access options when acquiring content. The survey identified a number of proposed activities, which libraries indicated they would like to learn more about, including a need for a user experience (UX) approach to better understand how users find open access content.

At the NAG practitioner event facilitated by the authors (Thompson & Stone, 2019b), delegates were invited to respond to the following questions about cultural change:

1. If we were to redesign our libraries around the premise of open rather than closed content, how would the library supply chain support open content?

2. How do we drive our own 'transition' of culture, processes and services so that they're built around open?
3. How do we rethink how we demonstrate value for money for resources invested in open?

This stimulated discussion about how open access is yet to become a mainstream activity in libraries. It is still usually, organisationally as well as perceptually, considered to be 'specialist'. In the journals space, this has presented challenges for teams who are now dealing with transformative agreements that combine the work associated with both subscriptions and open access payments. However, as noted above, this issue is exacerbated in the ebooks space where there is, as yet, no transition to open. In addition, individual monograph purchases do not come under the same scrutiny as new journal subscriptions, which often have to be signed off by a collection development committee. A further complication is time; libraries at the workshop reported that if an open access copy was not found in their supplier database of choice, they lacked the time and staff resource to check additional sources for open access monographs as part of the ordering or pre-ordering process. The coverage and quality of information about open content in knowledge bases was also a concern.

The collaborative responses of delegates at the NAG event can be distilled into two core themes: cultivating a culture of openness, and demonstrating the value of open content. Both are explored further in the discussion below regarding leadership and strategy, policies and practices.

3. Discussion

The COVID-19 crisis, and the ensuing imperative to make as many resources as possible available online has moved libraries closer to the tipping point from print to digital books. Within the UK, the split in library book budgets between print and digital is now 50/50 (NAG, 2020). Although some way from a full transition to open access, emerging funder policy in this area requires libraries to be prepared for the digital shift, while maintaining a 'hybrid' collection to meet the demand for print monographs from many scholars, especially those in arts and humanities disciplines.

3.1. *Leadership and Strategy*

The challenges identified by acquisitions practitioners and library directors in the workshops and presentations described above reflect a need for clear strategic direction at sector, institution and library level, in order to articulate what the role of the library will be when open access books are the norm, not the exception. This is supported by a COPIM community-workshop (Barnes et al., 2020) held in 2020, which looked at what libraries wanted to achieve by supporting open access books and infrastructures. One observation of that workshop was that libraries were essentially running on autopilot regarding collection development. For example, many purchasing decisions do not align with espoused values, such as supporting the transition to open access and open science.

Clear and effective library leadership is needed to align internal practices and embed open access in strategy, to avoid a risk of open access being overshadowed by the immediate and pressing concerns of individual academic institutions. Despite pressures on budgets, it is not the time for conservatism and maintaining the status quo. There is an opportunity to re-purpose the academic library budget to be used strategically to influence the future direction of the scholarly communications market and support a wider move to open science, as Sweden did with the re-purposing of the Elsevier budget (Söderbergh Widding, 2019).

Open access can polarise opinion, with attention often focused on evangelical enthusiasm or drivers such as policy compliance. The importance of open access to the democratisation of knowledge can sometimes be overlooked when it is presented as being just another publishing model. There is a need to more clearly articulate and translate open access values into business-like narratives highlighting the benefits with respect to KPIs and longer-term return on investment as well as wider societal benefits. In turn, this allows senior decision makers to improve their understanding of the change that is taking place in scholarly communications and publishing, and of the roles, responsibilities and influence of the academic institutions themselves.

A conceptual re-positioning of how the library thinks about, describes and promotes its collections to its user communities is also required. As Lorcan Dempsey has observed, "The print collection has been central to the identity,

value and organisation of the library", but while it remains important "the forced migration online may mark a final transition into a more full digital identity for the library" (Dempsey, 2020). This full digital identity includes shifts towards the "facilitated" and "inside out" collections, with open content playing a significant role in each (Dempsey, 2020). Furthermore, libraries need to re-evaluate their success criteria and move from assessing the size of a collection or size of budget to assessing the impact that connecting users with content, or facilitating creation of content, can have.

It is beyond the scope of this paper to debate the value of open content and open science in general. However, it is an important strategic question when put into the context of the challenging financial situation that many libraries are finding themselves in due to the economic and societal fallout of COVID-19.

3.2. *Policies*

There is also a need to translate values into library policies. In order to develop a more strategic approach to the transition to open access books, libraries must be clear about the kinds of open content, initiatives, and infrastructure in which they are prepared to invest. There are now a variety of different business and revenue models that enable libraries to support the transition. For example, freemium (OECD, OpenEdition), institutional subsidy (Lever Press, White Rose Press), library membership (Open Book Publishers, Punctum Books), library consortium (Knowledge Unlatched) (Collins et al., 2015; Mosterd, 2020; Penier et al., 2020; Speicher et al., 2018). A policy or framework is required that enables staff to make and justify decisions. For example, in choosing between open access initiatives and memberships, in the same way that libraries have developed criteria to consider new subscriptions.

A suggestion from practitioners at the NAG workshop was that open access should be included in collection management development policies. This would enable a holistic view of collections, which incorporates, and even prioritises principles around the value of open content, based on content expertise as well as other criteria. Incorporation into the collection management development policy would also help to mitigate the risk that the principle of open access stops being supported in the event of financial cuts.

To date, surprisingly few libraries appear to have developed collections policies which incorporate open access or articulate a values-led approach, a topic which was explored several years ago by Dyas-Correia and Devakos (2014). However, there are some examples in the UK including Imperial College (2020) and the University of Roehampton (2018).

However, in order to truly support open access, a sector approach to open access and collection management is required. This reciprocates the same scaling small approach being used by the ScholarLed open access presses (Adema, 2018; Deville et al., 2019).

3.3. *Practices*

Libraries need to embed new practices in order to transition to open access for books, and to develop a clear understanding of the costs and benefits of acquiring, curating and advocating for open content, just as they have for purchased content. Open access is not 'free'. Curation and management of such content requires resource, planning and organisation and will not happen consistently without policies in place to embed and prioritise these practices.

Hinchliffe (2018) has argued that libraries (supported by publishers) encourage the "over-utilisation" of subscribed content to demonstrate that they are providing value for money for their institution. This is also the case for monographs: libraries, keen to demonstrate that their purchased content is relevant to users, promote their 'expensive' purchased ebook collections, relegating open content to a less-visible second place. Rather than promoting open content as a separate category (in its own resource guide), libraries should promote it alongside, and where appropriate with higher priority, than paid-for content. Library staff already work closely with the academic community to assist in making their research open. However, they can also demonstrate the benefits for academic staff in using open resources, such as open educational resources, rather than paywall content in their teaching. Support should be given to help with the location and use of open content, and ensuring their inclusion in reading lists. Changes in practice will help the transition to open and move away from any perception that purchased material is somehow of higher intrinsic value, or that it should be promoted over open content.

Other measures, such as changing the type of statistics collected, can also have an impact. Libraries are expert in measuring the value of their content, based on a range of sector-standard metrics, and using those measures as management information to demonstrate return-on-investment and support decision making. Existing measures, such as cost-per-use or cost-per-download are not fit for purpose when evaluating open access resources. However, resources that are not measured are at risk of becoming invisible, both in terms of the amount of effort the library invests in managing them, but also in the value they provide. Libraries and open access publishers struggle with finding measures that are meaningful (Eve et al., 2020). Alternative measures are required to demonstrate the impact to both teaching and research of the open content that the library provides access to. These could include measurements such as click-throughs on reading lists and engagement with open access content authored by a researcher from that institution together with geographic usage patterns as opposed to institutional usage (Springer Nature et al., 2020).

3.4. *Structures*

Open access (as a library activity) is still relatively siloed and the work of the open access team is often regarded as a specialism, "everyone offloads everything OA to them" (Thompson & Stone, 2019b). In a library where much of the content provided and delivered is now open, these traditional structures are no longer fit for purpose. Indeed, for open access to library resources to become mainstream, there is a requirement to upskill library staff across different areas, and to ensure that expertise is not limited to teams working with institutional repositories or article processing charges. This encourages open access to be seen as business as usual within library teams, rather than a separate entity that can only be dealt with by specialists. There is a useful analogy here with the print-digital shift; in the early days of electronic resource management in libraries this was a specialist area undertaken by a different individual or team from those managing print resources, but over time the two areas of work were combined so that the same staff now deal with both formats (and, increasingly, more time is spent managing the digital). The same fundamental shift needs to happen in order to embed open into digital, requiring a focus on staff development, training in open access and workforce planning in order to enable staff to better understand and adapt to the

changing scholarly information environment that is having such a profound impact on libraries, publishing and academia.

In addition to staff development, integrating open into the wider library involves recasting job descriptions, prioritising the acquisition, discovery and ongoing management of open content and intentionally disrupting the affinity that many library staff feel towards the library's own purchased/subscribed content.

4. Conclusion

To effect change throughout the academic library, and embed and incorporate open access books within library collections, the strategic importance of open content needs to be understood, valued and clearly communicated internally across the library. Furthermore, the ensuing policies, practices and structures must accurately reflect this new strategy. This requires leadership at the individual library level, to effect and cascade the necessary changes within the library.

Leadership is also required to effect change within the wider institution, reimagining and re-presenting the library to our academic communities from being primarily identified as the providers of access to information as an end product, and position ourselves further upstream to engage with the scholarship process.

Libraries must capitalise on their power to drive change within the sector through purchasing power and consortial influence. The scale of libraries' purchasing power on books should not be underestimated; a study from 2017 estimated that UK academic libraries alone spent £12.4m on research monographs each year (Eve et al., 2017).

The Covid-19 pandemic has highlighted the extent to which the library community is connected. By coordinating the realignment of their policies and practices around open access, libraries have potential to change the current system. For example, Science Europe (2019) recommends a number of activities that libraries should undertake to support the transition to open access books, including repurposing part of their acquisitions budget towards open

access of both journals and books, encouraging the conversion of ebook packages to open access (such as via library consortia), and participation in cooperative funding models for open access books.

Science Europe's recommendations also call for institutional and sector-wide buy in to support open access for books. Otherwise, it warns, open access for books will remain aspirational, a 'nice to have' (Science Europe, 2019). In the UK, RLUK's 2018–2021 strategy (RLUK, 2017) identifies that while models for open access articles are well established, there are fewer options for books. Their response to this states, amongst other things, that they will support members to develop their own presses and seek collective solutions in order to drive down costs and create an open environment for monographs. Furthermore, in 2021, UKRI is expected to announce its policy for open access monographs, edited collections and book chapters and begin consultations on the Research Excellence Framework (REF) exercise after REF 2021 (UKRI, 2020). This will be followed at the international level by a cOAlition S "statement on Plan S principles as they apply to monographs and book chapters, together with related implementation guidance" (cOAlition S, 2020).

LIBER's *Vision for the research landscape in 2022* sees a world in which open access is the predominant form of publishing (LIBER, n.d.). Although this statement refers to journal publishing, funder intervention will see the volume of open access monographs increase rapidly over the next few years. However, without the corresponding adaptations to library policies, practices and structures, or leadership and advocacy from the library sector, a transition to open access books is in jeopardy. This article has set out a manifesto for cultural change: it is up to both national organisations and those at a European level, such as LIBER to support and enable libraries to implement this change at a sector level and make open access for books a reality.

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