

Berlin16 Open Access Conference - Session 3 Panel Discussion

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Relevance and impact of the progress made with TAs, globally, in own regional contexts

In the past three years, the national SA consortium has signed agreements with 14 publishers that offer discounts on article processing charges (APCs) or, in some cases, allow authors to publish OA without paying APCs.

In 2023, over 4 400 hybrid journals and 550 fully OA journals have been added to the list of journals where South African authors can publish fully OA without APCs, bringing the total to more than 7 835 hybrid journals opened up as a result of transformational agreements.

What this means is that in 2023, South African authors can now publish fully OA without paying APCs in more than half of all subscription journals that member institutions subscribe to.

It sound like a good news story – but how good is it really?

The South African National Open Science Policy aims

- To ensure an Open Access model that makes publicly funded scientific research publications open to all researchers, institutions, and companies for consultation, online, free of cost or other access barriers
- The desired outcome is a change in scientific culture and practice to increase the reach of those who benefit from science.
- “As Open as Possible, as Closed as Necessary”

Principles developed by SANLiC address three critical objectives:

1. Inclusivity and social justice – a long way still to go – costs of APCs, etc.
2. Enabling of our authors to publish full and immediate open access in their journal venue of choice without author-facing charges – a long way still to go (gold open access journals with the exception of two/three publishers) not included in agreements ...)
3. Containment or reduction in reading and publishing costs among participating consortium members (able to contain costs in reading cases – still increases – considering our buying power, exchange rates – have not seen a reduction in costs)

Progress or lack thereof, of publishers in meeting their community’s open access objectives

Most of our research was published in the subscription model, behind the paywall and without author rights retention.

Early evidence indicates that TAs have been successful in terms of accelerating the growth of South African open scholarship through Transformational Agreements

However, here are the most significant high-level observations about South Africa's research output trend which shows one foot behind the subscription paywall and one foot in open access:

1. Publishing in Gold OA journals has been growing significantly year after year
2. Publishing OA in Hybrid journals is struggling to take off– probably because of obstacles such as researcher's inability pay author facing charges
3. The combined OA publishing indicates a trend where the total cost of publishing OA is doubling every three to five years, even if APC pricing remains constant. If we cannot afford to pay to read, how can we ever afford to pay to publish on top of that?
4. Despite the doubling in the growth of OA publishing, publishing closed behind the paywall continues to grow annually, albeit at a slower rate than the growth in OA publishing.
5. It very quickly becomes evident that this trend is financially unsustainable.
6. Convincing publishers that a one-size fits all offer is not acceptable
7. Their approach should take local conditions into consideration
8. Gaining access to and interpreting the data we need from each publisher to plan the negotiations
9. The tendency for publishers to increase their article processing charges every year – this is a worrying trend. We could end up paying far more to publish than we previously paid just to read.

Expectations for further advancement toward a scholarly publishing paradigm that is open, sustainable, inclusive and globally equitable

- Open should mean open
- The goal of open access must be to ensure genuinely open access to the research publishing system for authors and readers alike.
- The need is growing to accelerate the spread of OA so that no research is needlessly held behind paywalls
- There is also a growing awareness of how vital it is to focus on inclusion
- We are seeing more and more that some models risk replicating division in the world, replacing barriers to access with barriers to publishing
- OA placed at the heart of efforts to drive sustainable development, both reflecting the explicit reference to access to information in SDG 16.10 and the broader role of science and research in the UN agenda.

Integration of principles of social justice and fee structures that are financially equitable on a global scale

Inclusivity and social justice must be core.

Publishers must have an equity and inclusion plan that addresses the challenges of researchers in the global south

Social justice and equity is the act of being fair and equitable in breaking down barriers to unfair practices and inequalities

We are not asking for hand-outs or favours – we are asking for fairness.

It advances the protection of equal access to liberties, rights, and opportunities, as well as taking care of the least disadvantaged members of society

It is viewed as a two-way process: The first step is the deconstruction of structures that perpetuate inequality, exclusion, and marginalization and the second step is the reconstruction of the structures that advances equity.

In the scholarly communication environment, it addresses the different biases such as geography, language and peer review

Inclusion is the process of improving the conditions of participation.

It requires challenging exclusion by removing barriers to participation

It demands deliberate steps to facilitate participation

Inclusion processes require both addressing the drivers of exclusion, such as discriminatory attitudes and behaviours

Equity is the provision of various levels of support and assistance depending on specific needs.

Equity has two parts to it:

- 1) Financial and economic – need more equity in this
- 2) Engagement (stakeholders) – how are we making sure that all stakeholders have influence/who makes the decisions/who decides what is quality
- 3) If we have equity then diversity will follow

Equality is the provision of the same level of opportunity and assistance to all.

Equality in an inequality scholarly landscape consolidates marginalization and exclusion.

Wrap up with a round of key messages for the publishers

- OA like what we currently experience leaves out the largest number of scholars in the world
- Remove the stigma with OA
- Must go further than transformative agreements
- Do more about transparency
- Should operate on a level-playing field
- Public good – absolutely critical – need to re-establish science and the distribution thereof as a public good – we can do it together or we should return scholarly communication to the researchers