

oaswitchboard

6 April 2022

Yvonne Campfens
Executive Director



Topics for today

- How it started and what it is about
- OA Switchboard – central information exchange hub
- Lessons learned from the first year of our launch phase
- What do others say?
- What's next?
- Q&A

How it started (2018!) and what it is about



Open Access Scholarly
Publishing Association

✉ OASPA NEWS

in

🐦

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Developments:

- Funders and institutions are paying for OA centrally
- OA business models are becoming more and more diverse
- Funders and institutions are expanding requirements
- 'Multi-lateral publication level arrangements'
- ...

The OA Switchboard

February 12, 2019 by [Claire Redhead](#)



On December 6th 2018, a group of stakeholders representing research funding organizations, academic libraries, scholarly publishers, and open infrastructure providers met in London to discuss a proposal for addressing the growing set of challenges in the implementation of institutional and funder policies supporting open access publication. The

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Serious implementation challenges:

- A myriad of systems and process
- Many-to-many relationships to be maintained between the multitude of stakeholder groups (and their members)
- Manual and human interaction
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Serious implementation challenges:

- A myriad of systems and process
- Many-to-many relationships to be maintained between the multitude of stakeholder groups (and their members)
- Manual and human interaction
- ...

As consequence:

- Policies are not always effectively implemented and agreements not realised to the full
- Slow progress in developing new business models
- From a researchers perspective, this landscape is at best confusing, and at worst impenetrable
- ...

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Open Access is opening research up to the world



Academics, institutions, funders, and publishers are committed to ensuring that research is accessible to all



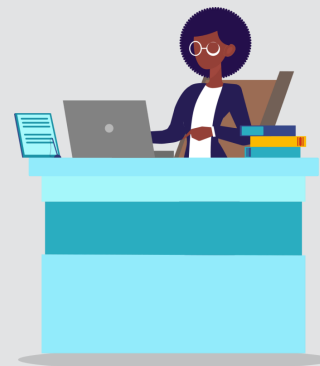
Research funders and institutions are expanding requirements.
OA business models become increasingly complex and diverse.



Publishers

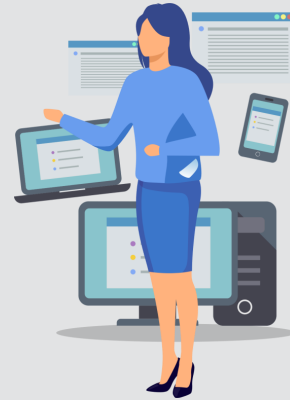


Research funders



Institutions / libraries

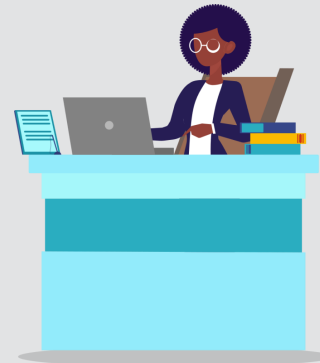
How do stakeholders navigate the OA research and publishing cycle?



Publishers



Research funders



Institutions / libraries

How do publishers support a smooth and compliant author journey and report on OA publication output?



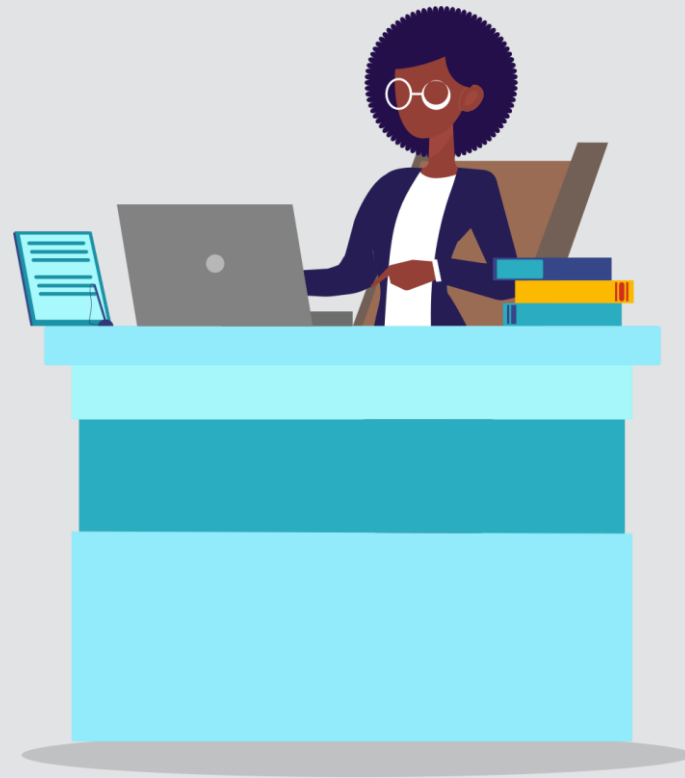
Publishers

How do funders demonstrate the extent and impact of their research funding and deliver on their commitment to OA?

Research
funders

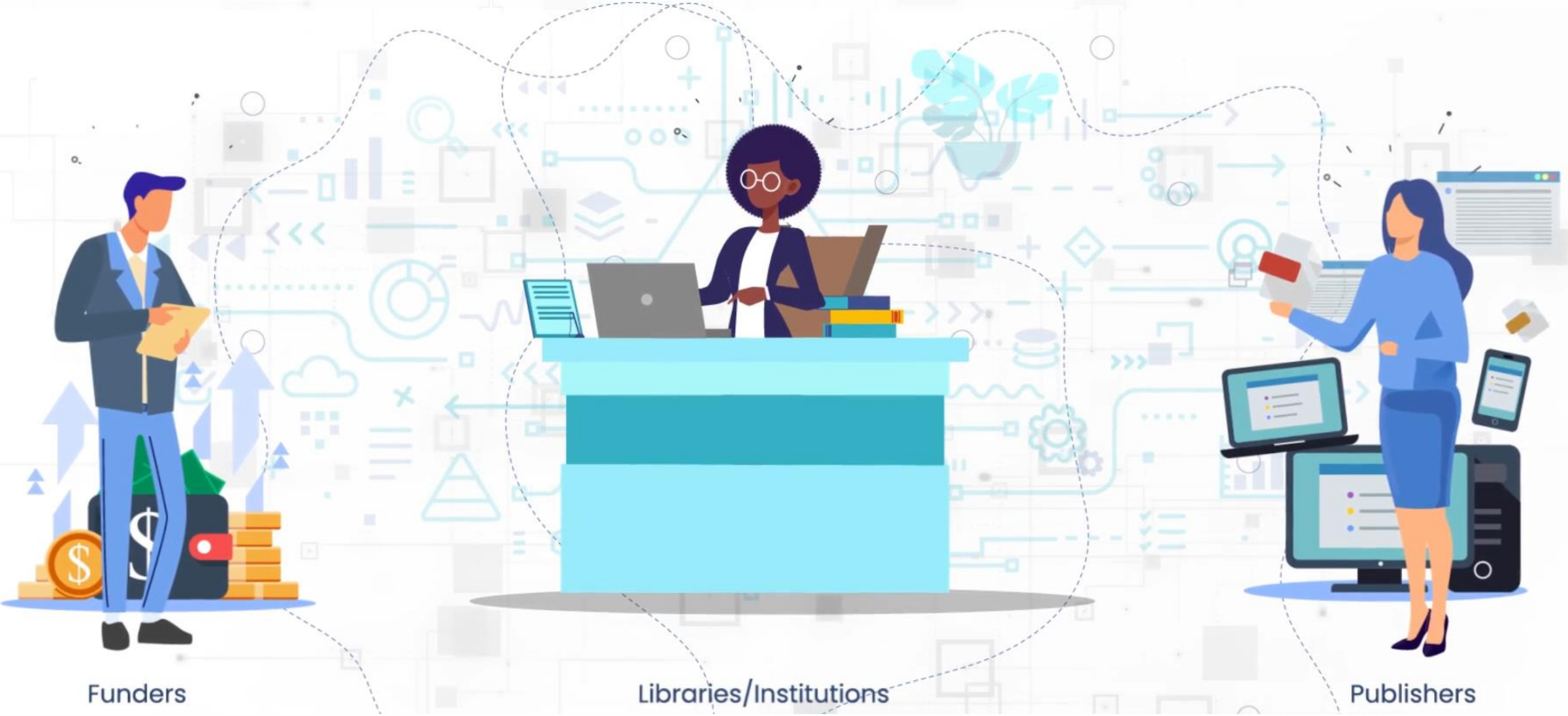


How do research institutions, and their libraries, connect with their research and simplify their workflows?

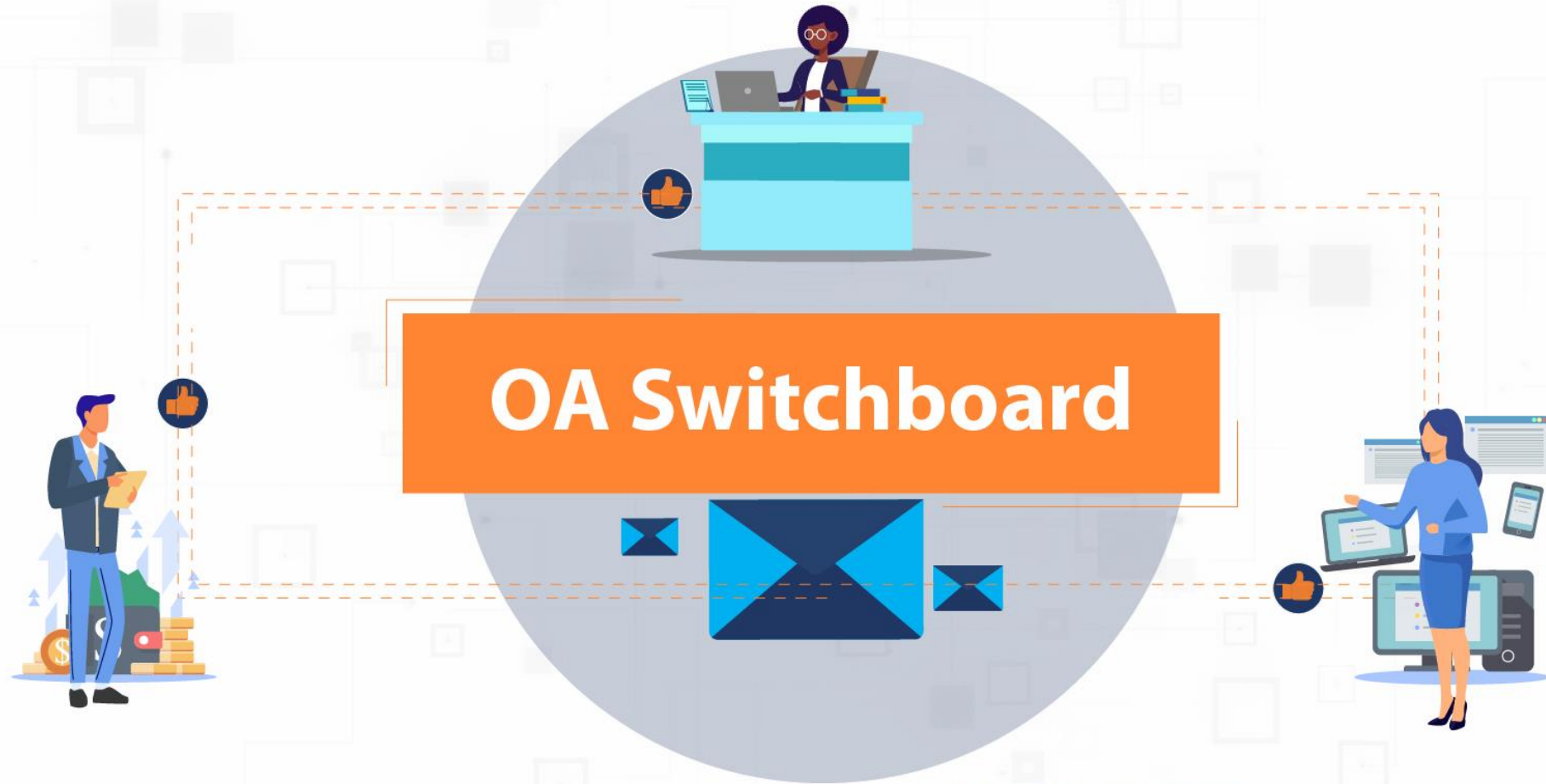


Institutions /
libraries

Funders, institutions and publishers are faced with a myriad of systems and processes

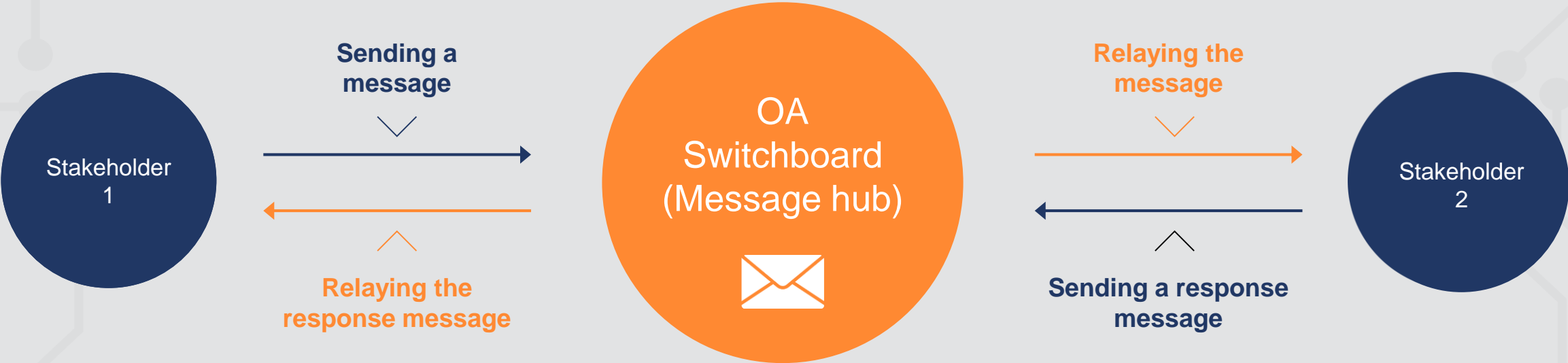


The OA Switchboard is a mission-driven, community led initiative designed to simplify the sharing of information between stakeholders about OA publications



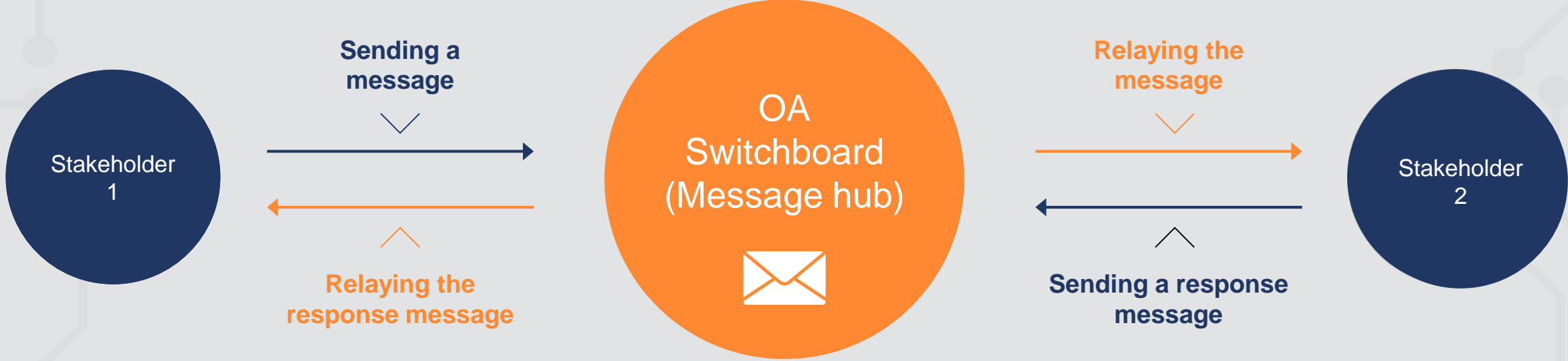
OA Switchboard - central information exchange hub

research funders – libraries/institutions/consortia - publishers



OA Switchboard - central information exchange hub

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✓ Standard messaging protocol, automated validation and routing - *authoritative data from source*

✓ Shared infrastructure, connecting and complementing existing systems and solutions - *leveraged with PIDs*

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Blog post – OA Switchboard one year live: Community, collaboration, and delivering on the promise of PIDs

8 December 2021 by Yvonne Campfens, Executive Director OA Switchboard

You may remember us proudly announcing 'We're live!' back in our [January 2021 blog post](#). In this year-end post, we're delighted to share how, together with our founding partners, launch customers and other stakeholders, we have built a community of like-minded spirits on a mission: a breakthrough in the transformation of the market, enabling OA to be supported as the predominant model of publication.

More on why and how the OA Switchboard came about can be found [here](#). The OA Switchboard supports multiple use cases and business models (watch our [video animation](#) on 'matching publications costs with publication funds'). Our [governance](#) and guiding [principles](#) are central to the way we operate and to how we are developing the OA Switchboard, and to how we interact with and engage the community - you can read about our self-assessment against the Principles of Open Scholarly Infrastructure [here](#).

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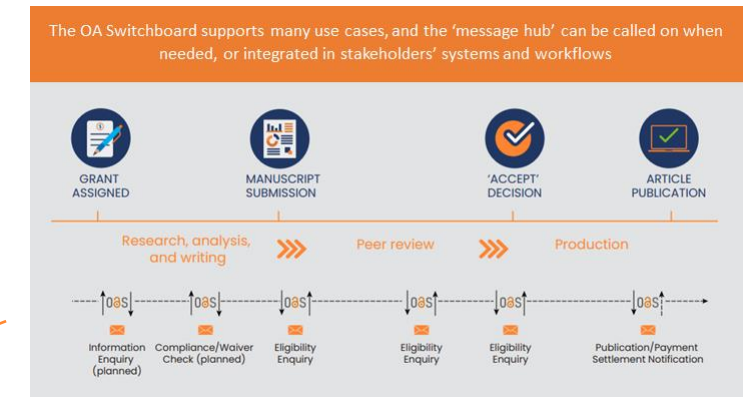


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Summary

Governance

- ♥ Coverage across the research enterprise
- ♥ Stakeholder governed
- ♥ Non-discriminatory membership
- ♥ Transparent operations
- ♥ Cannot lobby
- ♥ Living will
- ♥ Formal incentives to fulfil mission & wind-down

Sustainability

- ♥ Time-limited funds are used only for time-limited activities
- ♥ Goal to generate surplus
- ♥ Goal to create contingency fund to support operations for 12 months
- ♥ Mission-consistent revenue generation
- ♥ Revenue based on services, not data

Insurance

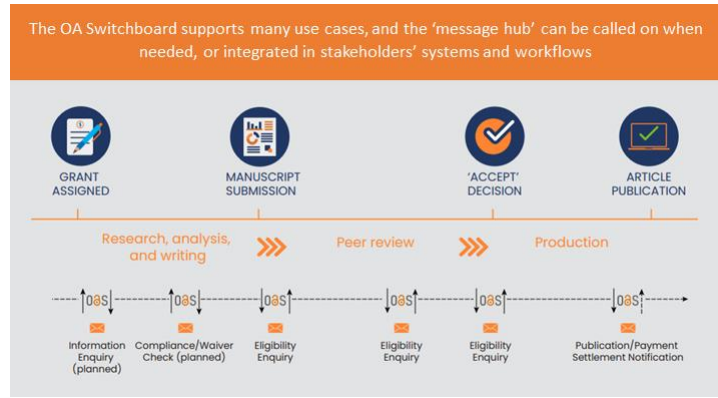
- ♥ Open source
- ♥ Open data (within constraints of privacy laws)
- ♥ Available data (within constraints of privacy laws)
- ♥ Patent non-assertion

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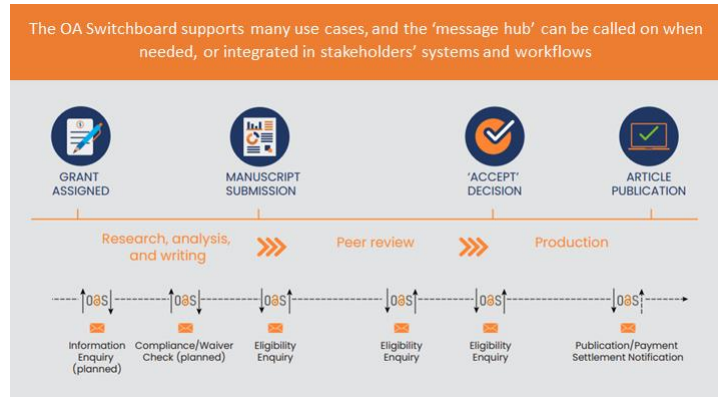
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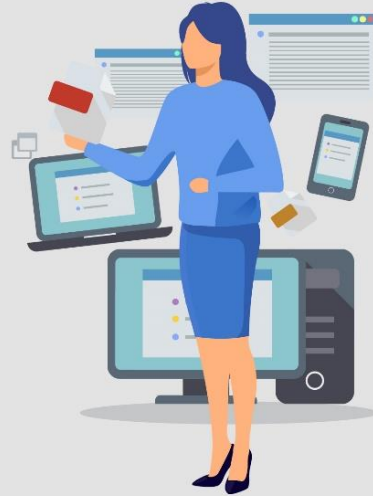


- 1. Neutrality and independence are preserved
- 2. Collectively controlled funder - institution - publisher collaboration
- 3. Self-sustaining, not-for-profit, business model
- 4. Supporting all OA business models, policies, and types of scholarly output
- 5. Industry-wide representation and collaboration in developing open source solutions and services
- 6. Intermediary, observing funder - institution - publisher researcher (author) proposition and interaction



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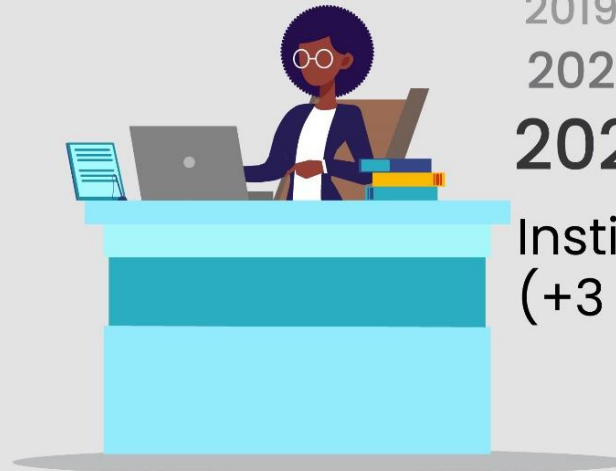


2019: 0
2020: 12
2021: 23
Publishers

2019: 0
2020: 5
2021: 6
Research funders



2019: 0
2020: 6
2021: 38
Institutions/libraries
(+3 consortia)



Live Participants and Total Number Messages (cumulative) sent per 1 April 2022



Lessons learned from the first year of our launch phase

(source: 8 December year-end blog post)

1. PIDs in article-level metadata are critical for solving real problems.
2. For OA publications there are two relevant and parallel workflow tracks. There is a need to exchange metadata between the tracks.
3. Tension between providing a great author experience and an ‘ideal process’.

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“
The OA Switchboard addresses an acute market need and has mission alignment working in its favour... It is not intended to compete... Since standardized metadata will eventually benefit everyone in the market.

OUTSELL ANALYSIS

19 January 2021



The OA Diamond Journals Study

Exploring collaborative community-driven publishing models for Open Access

Part Recommendations

Infrastructure
Provide journal reporting capacity

“...Journals should be able to rely on a common infrastructure connecting them to funders, enabling a trusted exchange of information, such as the service provided by the OA Switchboard...”

UK collaborates with new body to accelerate global open access

3 December 2020

[UK Research and Innovation \(UKRI\)](#), [Wellcome](#) and Jisc are among the first organisations supporting the establishment of a new body called [Open Access Switchboard](#).

“We are delighted to pilot our shared funding model with the Royal Society..., as well as to jointly explore new open access infrastructure with the Society through the OA Switchboard”

Ivy Anderson, Associate Executive Director of UC’s California Digital Library, 9 March 2021

← Quote Tweets



ROR community @ResearchOrgs · 20h

Great example of how to leverage open and shared infrastructure with PIDs

🌞 #LetsRORtogether

Blog Posts

Aries Systems Continues Support for the OA Switchboard

DATE: OCTOBER 5, 2021 | CATEGORIES: USER COMMUNITY, EDITORIAL WORKFLOWS, INTEGRATIONS, OPEN ACCESS



CCC and the OA Switchboard Collaborate to Offer Increased Efficiency and Transparency for the Scholarly Communications Community



March 29, 2022 – Danvers, Mass. – [CCC](#), a leading provider of Open Access (OA) workflow solutions, and the [OA Switchboard](#), a global, not-for-profit collaboration between funders, institutions and publishers, announce a collaboration to automate the exchange of OA transactional information between publishers and their customers through the OA Switchboard.

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What's next

(source: 8 December year-end blog post)




The second year of our launch phase will build on the hard work of 2021 in terms of priorities and use cases.

Our overarching focus will continue to be on:

- Authoritative data from source
- Interoperability of existing systems
- Connecting the dots of existing PIDs

All, in our characteristic, well established, collaborative spirit.

OA Switchboard - central information exchange hub

-  **Trust** – The independently managed, shared infrastructure provides a safe space for publication metadata, including author details (and their affiliations), research funding information, and publication licenses.
-  **Collaboration** – The standardised protocol allows for the transparent exchange of data about OA publications, designed to operate and integrate with all stakeholder systems.
-  **Efficiency** – It eases the administrative burden of maintaining many-to-many relationships, and managing OA compliance. It also reduces the sheer volume of manual information exchange.

OA Switchboard - central information exchange hub

We are very excited to invite new partners to join us.

The central information exchange hub grows stronger with every participant, becoming a better tool for all.

Contact us today to understand how joining the OA Switchboard can both serve your organisation and drive open access.

Questions & Discussion



Thank you

Yvonne Campfens

yvonne.campfens@oaswitchboard.org

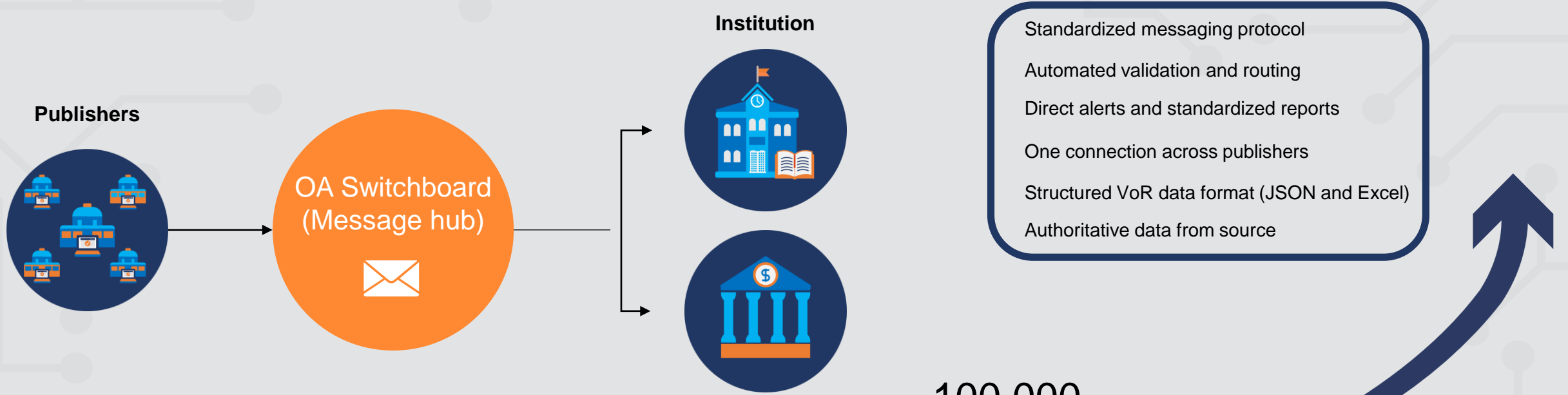
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www.oaswitchboard.org

Sign up to our mailing list for regular updates

Looking forward to meet you at more conferences!
UKSG (29-30 May), Bibliotheks Kongress Leipzig (1-2 June)





Reporting Made Easy

