

Konsortium der Schweizer Hochschulbibliotheken  
Consortium des bibliothèques universitaires suisses  
Consorzio delle biblioteche universitarie svizzere  
Consortium of Swiss Academic Libraries

# Shaping the Swiss Open Access Monitor

19 September 2022, Sabine Friedlein



This work is licensed under a [Creative Commons Attribution 4.0 International License](https://creativecommons.org/licenses/by/4.0/).

# Agenda

## **About Swiss Open Access Monitor**

A cooperative project

## **Forschungszentrum Jülich**

Strategic partner

## **Task Force Monitoring**

Specialist advisors

## **swissuniversities members**

Community of users

## **Beyond the project**

Exchange is key

# About the Swiss Open Access Monitor



# Open Access indicators

## National Open Access Strategy and Action Plan

- By 2024, all scientific publications from Swiss universities should be openly accessible.
- National indicators necessary to monitor progress towards OA.



## NOAM provides indicators:

- Publication figures of Swiss HEI for selected publication types
- Basic OA shares per publication year according to Unpaywall classification (Green, Gold, Hybrid, Closed)

## Out of scope:

Cost monitor

# The National Open Access Monitoring (NOAM) project

## Frame

- **Duration:** 10/2021-09/2022
- **Budget:** CHF 200'000
- **Funding:** swissuniversities/ Consortium of Swiss Academic Libraries
- **Implementation:** Consortium of Swiss Academic Libraries
- **Cooperations:** Jülich Research Centre, AKOA, swissuniversities members, SNSF

Mandated by  
**swissuniversities**

## Goals

Collect data on publications to determine the OA share.

Make OA shares and data accessible.

Ensure the future provision of the Swiss Open Access Monitor.

# Two separate methods of data collection

## Journal Monitor (OAM-CH)



- Cooperation with Forschungszentrum Jülich
- Resource type: Journal article
- Data sources: Unpaywall, Crossref, DOAJ, ROR, Dimensions
- Motivation: fast results at high maturity level (international standards), far-reaching expert evaluations possible

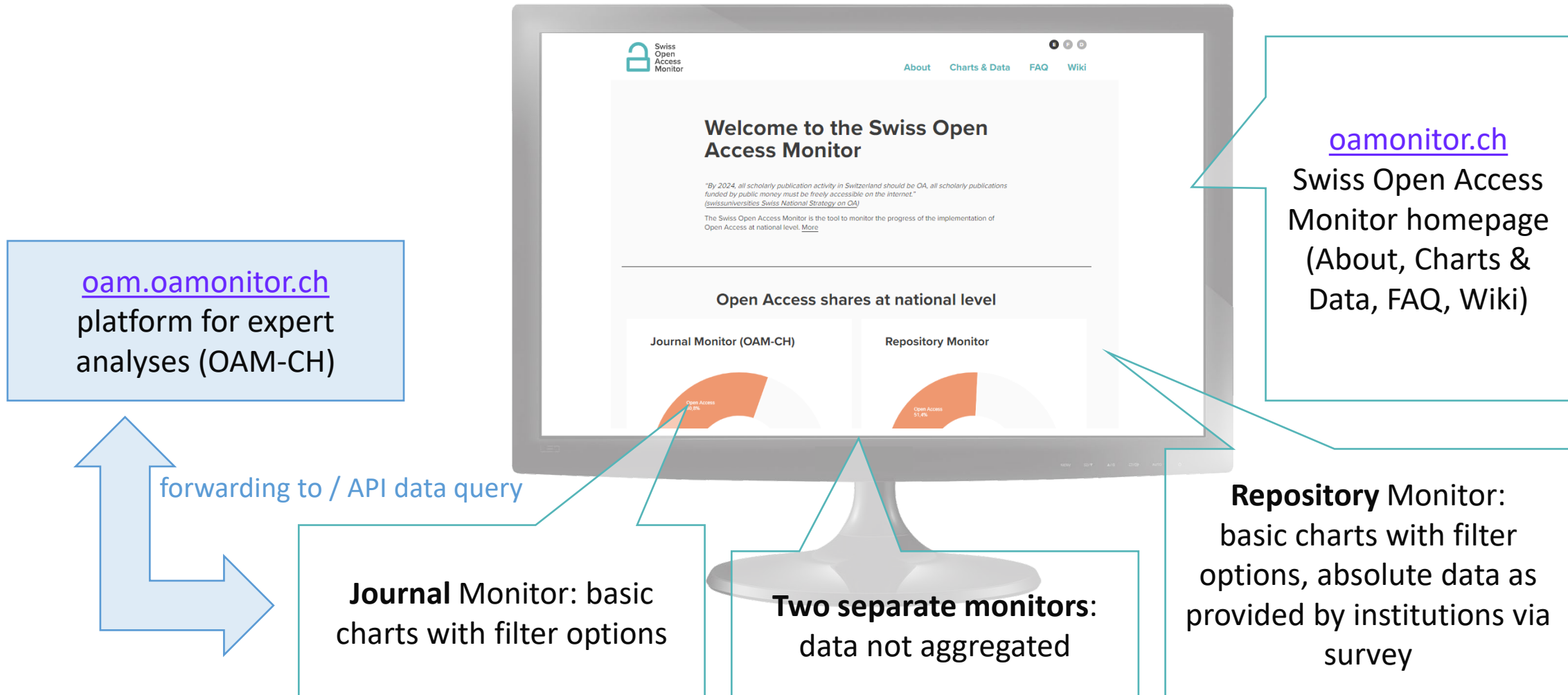
## Repository Monitor

swissuniversities



- Cooperation with swissuniversities members (and associated institutions)
- Resource types: Journal articles, books, book chapters, conference papers
- Source: Institutional repositories or university bibliographies, via national survey; focus on absolute data
- Motivation: to counteract disciplinary (STM) and linguistic (English) bias, in the long term

# The Swiss Open Access Monitor (oamonitor.ch)



Source: Consortium of Swiss Academic Libraries; this work is licensed under a [Creative Commons Attribution 4.0 International License](https://creativecommons.org/licenses/by/4.0/).

# Swiss Open Access Monitor: cooperations

## Task force Open Access Monitor

Forschungszentrum Jülich:  
OAM-CH

[oam.oamonitor.ch](http://oam.oamonitor.ch):  
platform for expert  
analyses

**Journal Monitor:** basic  
charts with filter options

Website developer:  
charts

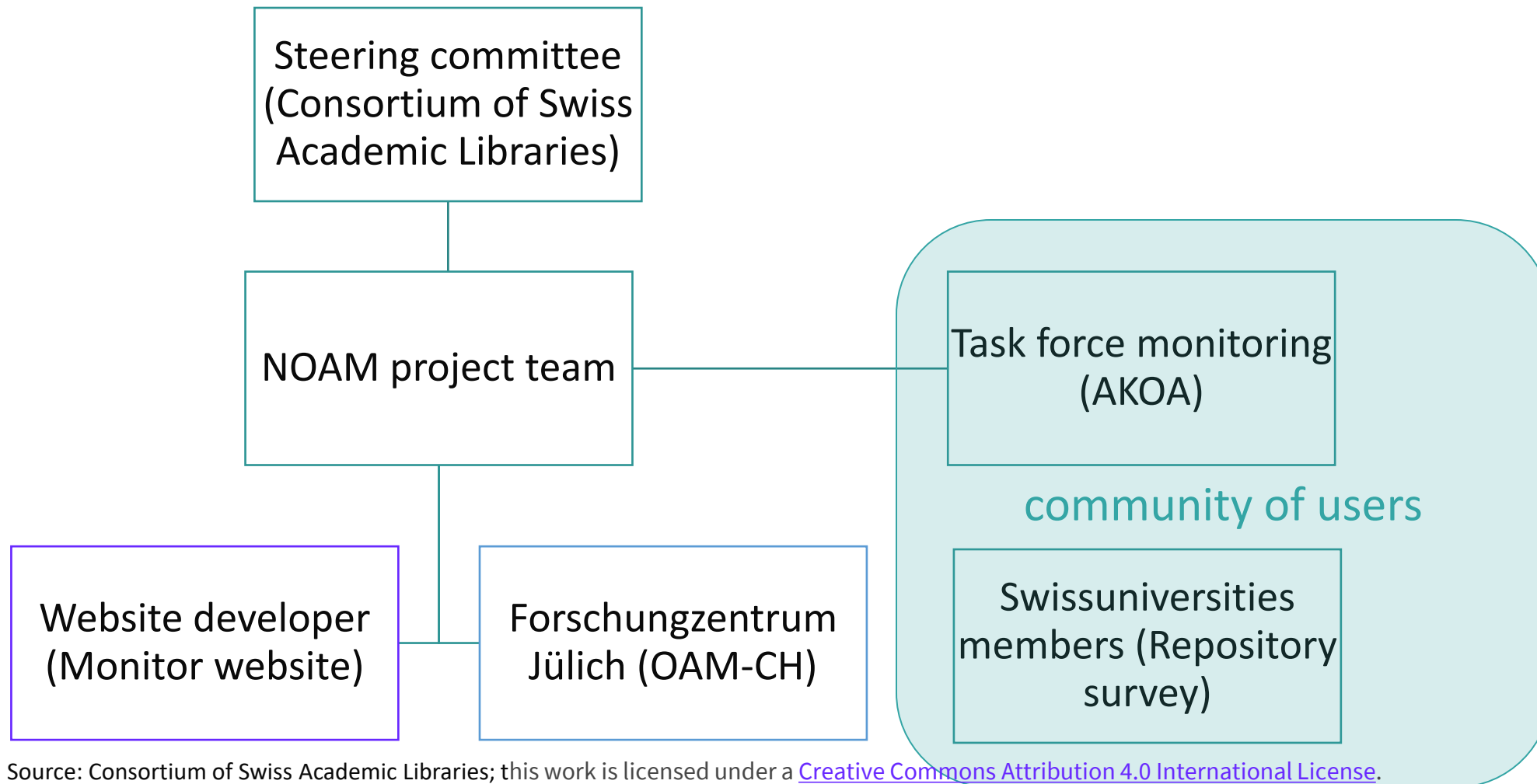
swissuniversities  
members: data  
delivery

**Repository Monitor:**  
basic charts with filter  
options, absolute data as  
provided by institutions via  
survey

Source: Consortium of Swiss Academic Libraries; this work is licensed under a [Creative Commons Attribution 4.0 International License](https://creativecommons.org/licenses/by/4.0/).

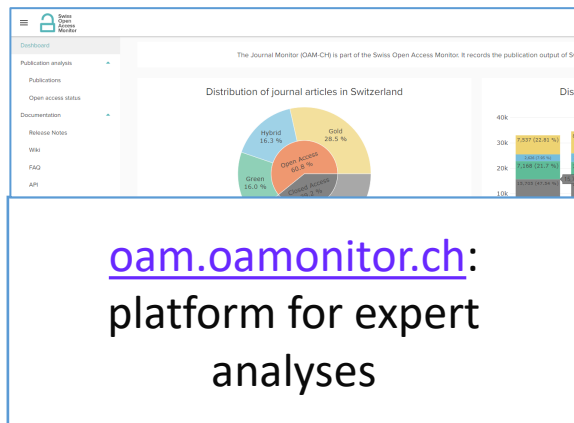


# Swiss Open Access Monitor: cooperations



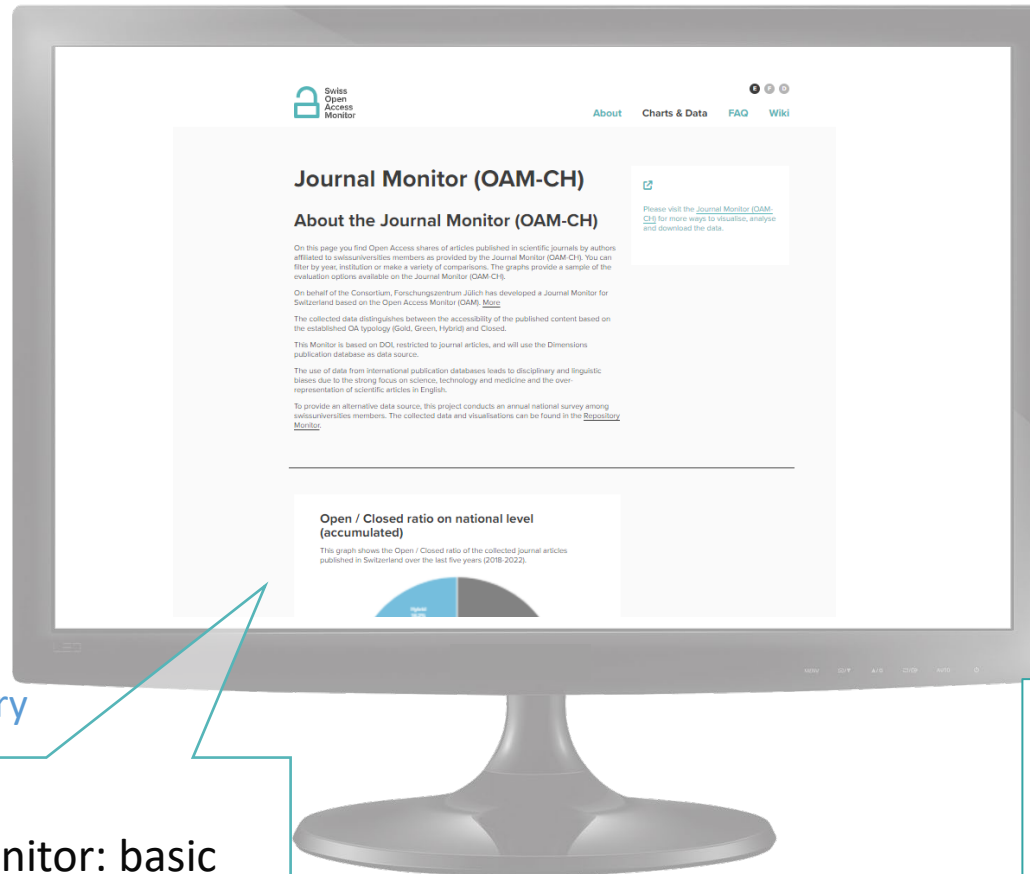
Source: Consortium of Swiss Academic Libraries; this work is licensed under a [Creative Commons Attribution 4.0 International License](#).

# The Journal Monitor



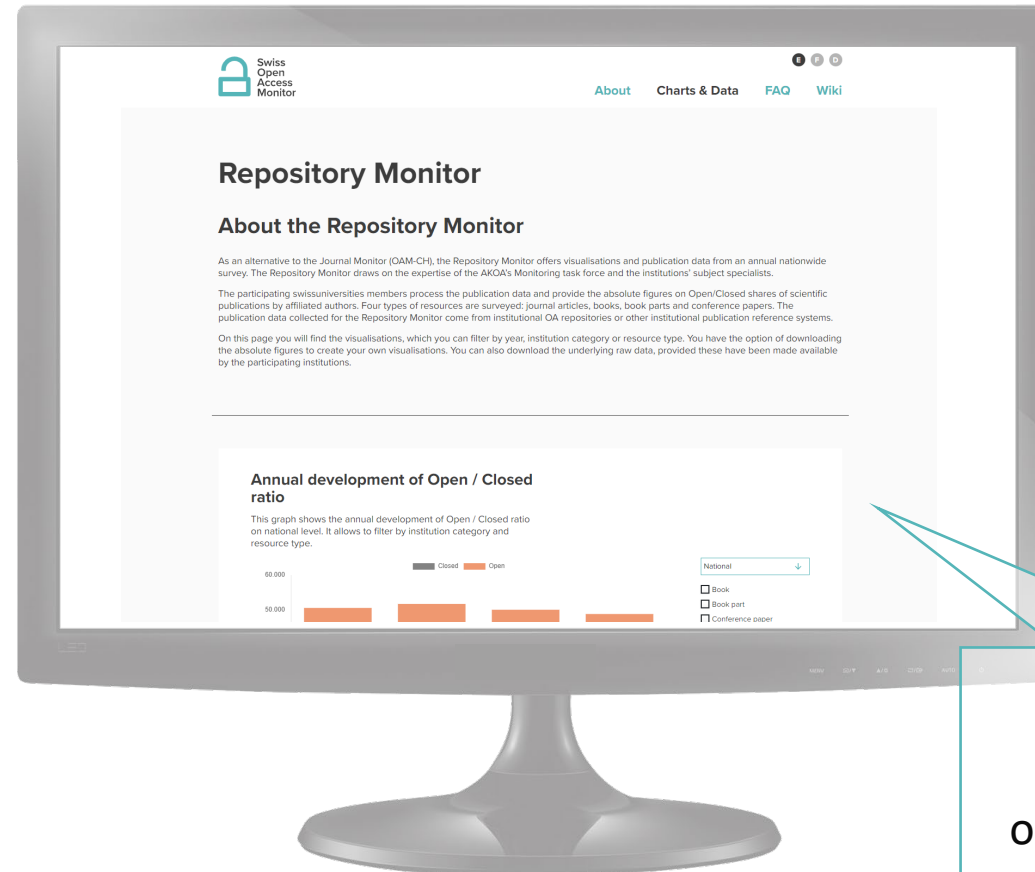
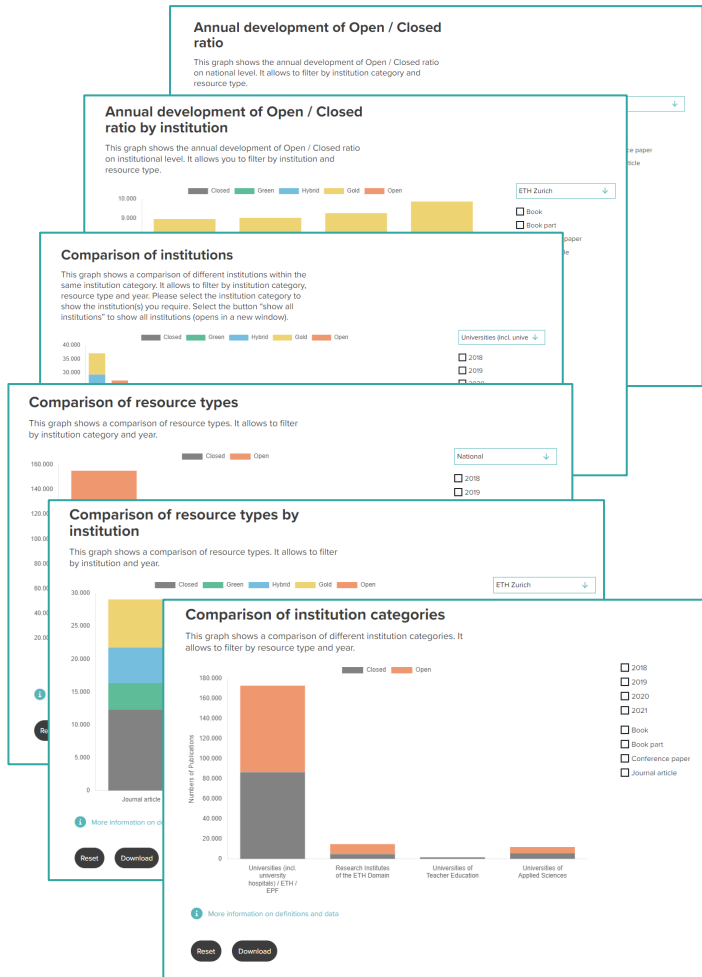
forwarding to / API data query

**Journal Monitor: basic  
charts with filter options**



Source: Consortium of Swiss Academic Libraries; this work is licensed under a [Creative Commons Attribution 4.0 International License](https://creativecommons.org/licenses/by/4.0/).

# The Repository Monitor site



**Repository Monitor:**  
basic charts with filter  
options, absolute data as  
provided by institutions via  
survey

Source: Consortium of Swiss Academic Libraries; this work is licensed under a [Creative Commons Attribution 4.0 International License](https://creativecommons.org/licenses/by/4.0/).

# Webinars

- Webinars on 27 and 29 September 2022
- Registration open until 22 September 2022:  
<https://forms.office.com/r/SCMNaidSjn>



# **Forschungszentrum Jülich**



# Collaboration with FZ Jülich

## Professional collaborations

FZ Jülich as expert partner

Regular meetings included OA specialists from task force

Regular updates and decision-making during task force meetings

Regular coordination between project team with website developer on web design and API

## Jan-Mar 2022: implementation of specifications

Inst. ID / category / Canton

No «cost analysis»

No «citation analysis»

Reduction of filter criteria to essentials

Simplified OA categories (also 1 OA filter)

Publication data filter by year (YYYY)

## April-Sept 2022: test phase and go-live

Inclusion of ROR child institutes

Translation into French

Implementation of webdesign

Sept: Go-live

# **Task Force Monitoring**



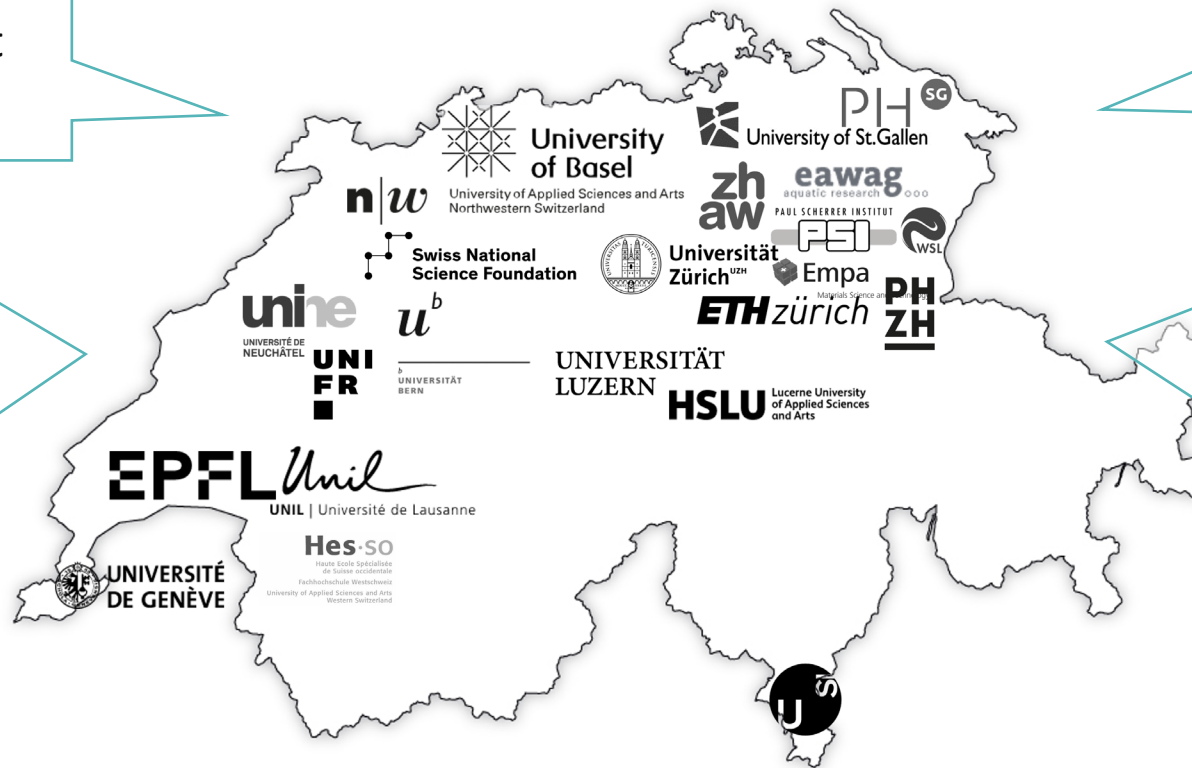
# Cooperation with task force monitoring (AKOA)

AKOA involved in monitoring project from the start

Task force included in decision-making process, votes, in-depth discussions

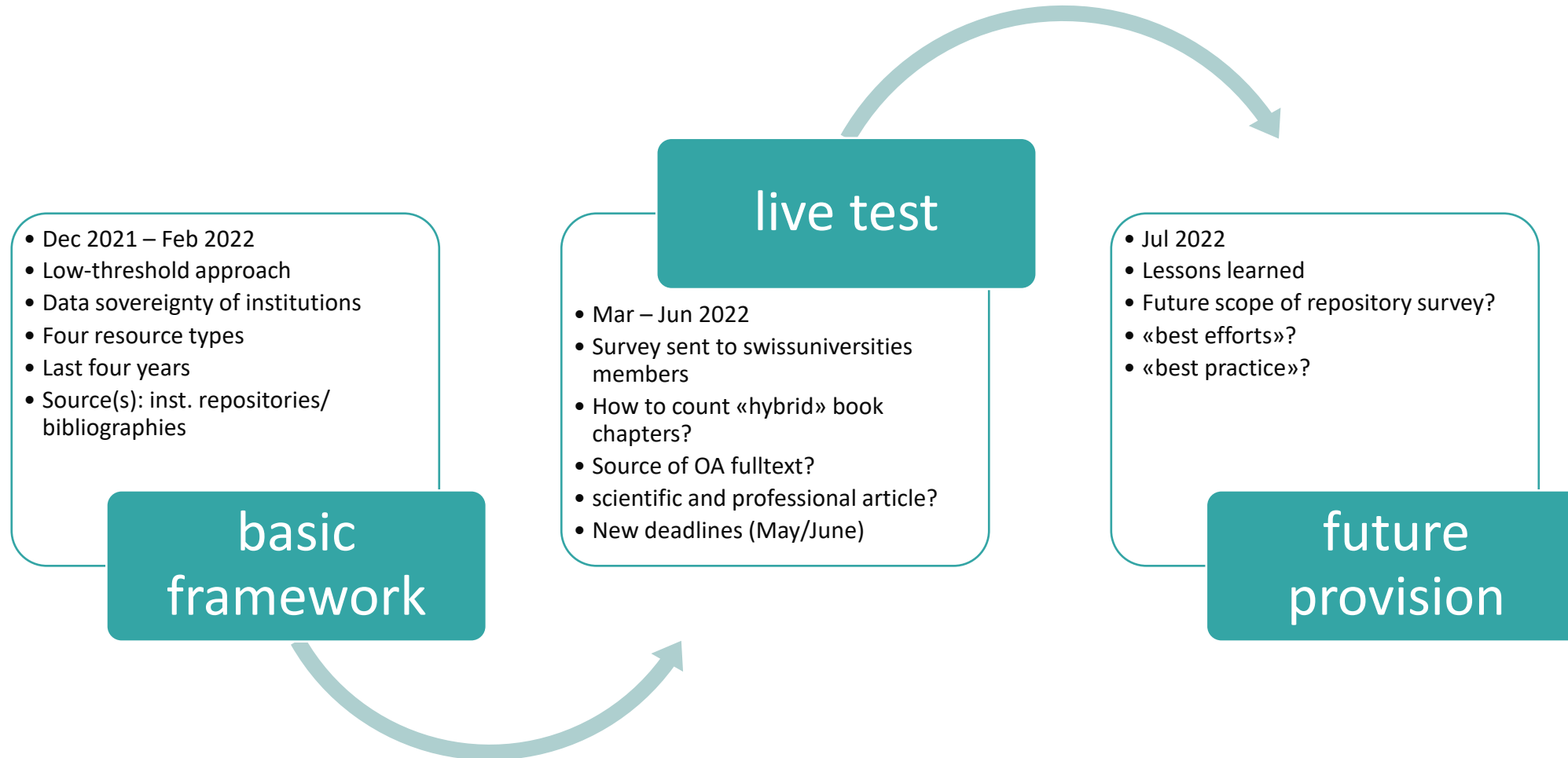
OA specialists representing over 20 institutions

Preparatory meetings  
8 general meetings  
sub-groups  
Ø 20 work hours p.p.





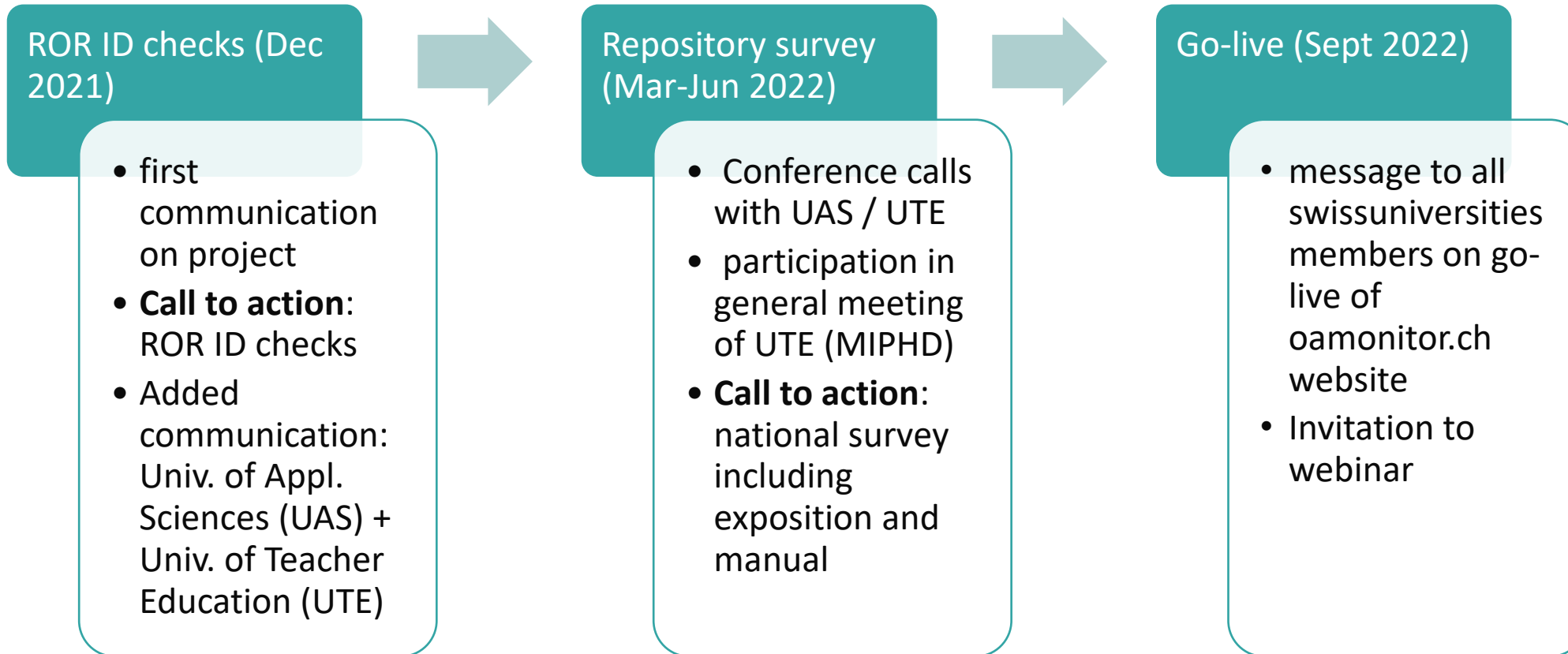
# Shaping the repository survey



**swissuniversities**  
**members**

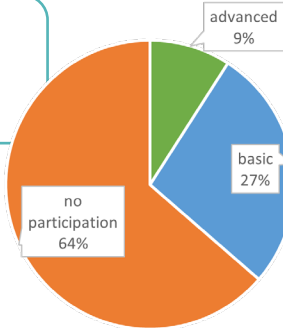


# swissuniversities members: communication

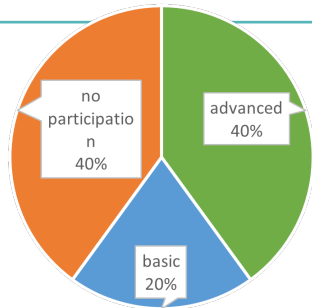


# swissuniversities members: participation in national survey

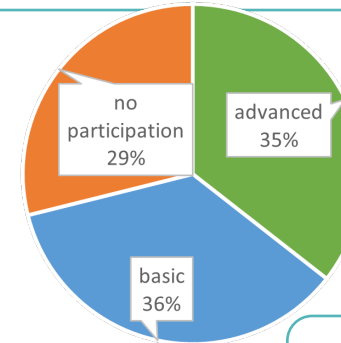
## Universities of Applied Sciences



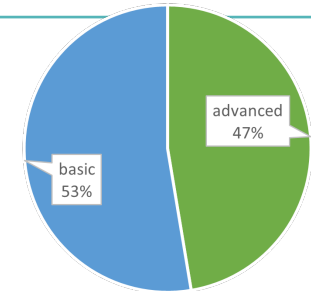
## Universities of Teacher Education



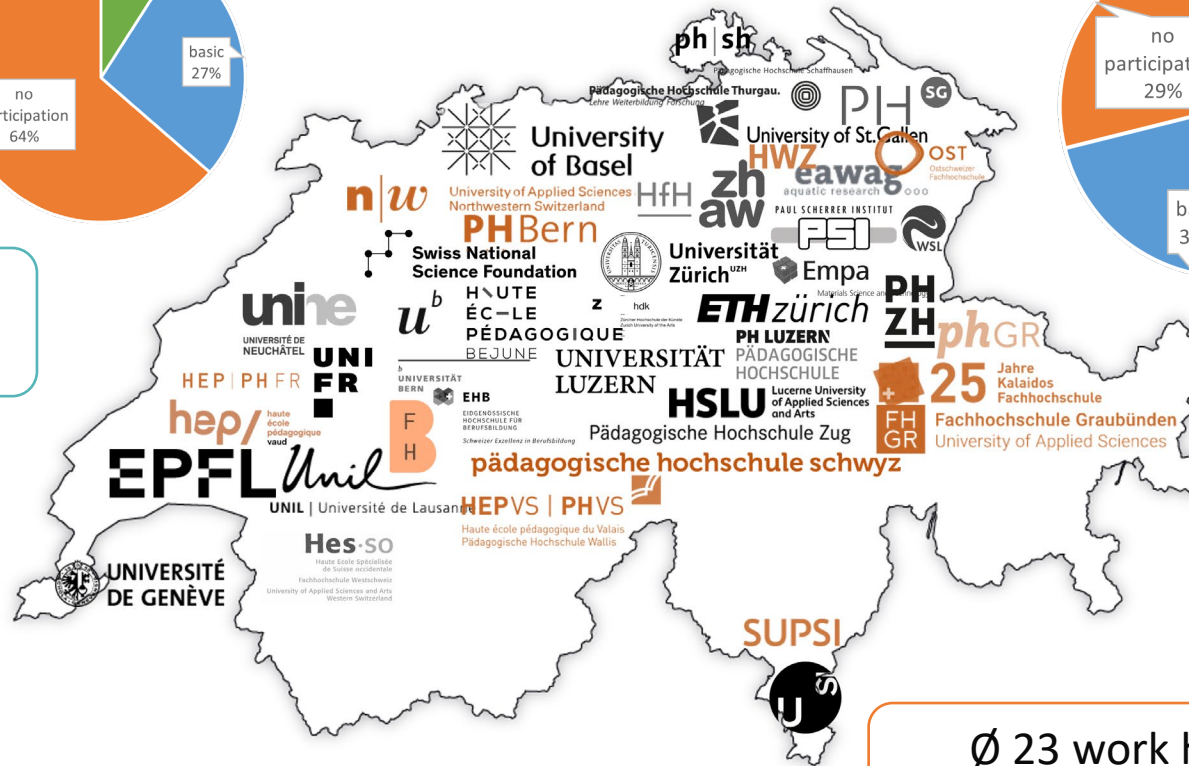
## National level



## Universities / ETH/EPF / research inst. ETH domain



Ø 23 work hours per institution



Source: Consortium of Swiss Academic Libraries; this work is licensed under a [Creative Commons Attribution 4.0 International License](https://creativecommons.org/licenses/by/4.0/).

# Added value for swissuniversities members

## National repository survey as point of reference

- Specifications allow for concrete questions
- Potential adaption of institutional repository/CRIS
- Institutional collaboration on scope/design of the project

## Swiss Open Access Monitor as basis for discussion

- Positioning within one's own institution on OA
- If applicable, impetus for long-term OA transformation
- Can staff resources be (permanently) freed up for open access issues (such as the repository survey)?

**L**

**Beyond the project**

# Challenges and opportunities



«Apple»

Cooperation and communication

Heterogeneity of institutions and data: different needs and standards



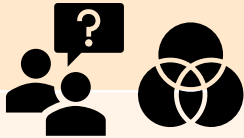

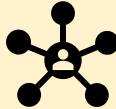



FAIR data: Repository survey, mapping, description, documentation

Future provision: curation, hosting, technical development, continued funding



**Business plan (10/2022- 12/2024)**  
**Personal resources necessary**  
**Continued inclusion of OA specialists (AKOA)**

# The GOAL project: Unlocking the Green OA Potential

Project	Task	Action	Results
 Swiss Open Access Monitor	Data gathering 	Dialogue (look for overlaps) 	Different focus <u>BUT</u>  Continued dialogue to:  Share information  Cooperative communication
 goal Unlocking the Green Open Access potential	Data gathering 		



# Thank you

[oamonitor@consortium.ch](mailto:oamonitor@consortium.ch)  
<https://oamonitor.ch>

