Open Matariki Phase 1 Report

October 17, 2017

The Open Matariki project aims to support the vision, purpose and mission of the Matariki Network of Universities (MNU). Access to research and scholarly outputs in a healthy scholarly communication ecosystem is essential for discovery, innovation and education. By building upon our collective strengths to ensure timely and continuing access to these outputs around the globe, the project is fundamental to each element of MNU's mission, and in particular to:

- Promote and develop global excellence in delivering a research-inspired and truly international education to our students;
- Nurture high impact, innovative research communities that stimulate and promote social and global responsibility.[1]

Open Matariki Phase 1, 2017

The project arose through discussions of library representatives of each of the MNU institutions. All of us are grappling with issues and opportunities in advancing scholarly communications and open access, and one of the challenges we face is in trying to influence what is essentially a global ecosystem. This challenge is well recognized by institutions and organizations around the world, and there are multiple efforts to work together to achieve more equitable and open models of sharing research outcomes. The MNU libraries posited that we could have unique opportunities to advance these efforts, as a small nimble group of known colleagues, at institutions with similar attributes, working in different national contexts.

Phase 1 of the Open Matariki project set out to establish the commonality and differences, and explore potential opportunities, in the ways in which each of the MNU libraries and their universities, and their countries, are working to advance new models of scholarly communication and open access. A survey was conducted and reported upon to share information about the initiatives that each MNU library is undertaking to advance new models of scholarly communications and open access. Based on the information compiled, potential projects were discussed in relation to the Canadian Association of Research Libraries Scholarly Communications Roadmap.[2] This roadmap is guided by the vision of an open, sustainable, effective and innovative scholarly communication system that is governed and managed by the

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[1] https://matarikinetwork.org/about/mission/
[2] http://www.carl-abrc.ca/wp-content/uploads/2017/03/CARL_ScholComm_Roadmap_EN.pdf

scholarly community, and that reflects a substantial role for academic libraries working in collaboration with researchers and other stakeholders. The roadmap outlines five strategies:

1. Increase awareness and engage stakeholders about the benefits of open access and the need for change
2. Promote and accelerate the adoption of open science policies
3. Lower the economic barriers to the creation and dissemination of academic publications
4. Promote the responsible application of impact and productivity measures for research
5. Expand the types of research outputs that contribute to the formal scholarly communication system

MNU library representatives met at the Matariki Network Humanities Colloquium in Tübingen in October 2017, and discussed the information gathered through the survey and shared at the meeting, and potential joint strategies. The discussions led to agreement to establish an Open Matariki program consisting of three elements:

1. **Awareness and engagement**

   MNU member libraries are undertaking multiple methods of raising researcher awareness of publishing options, copyright and authors' rights and supporting the adoption of open access policies and services. A variety of specific services are of particular interest, such as the implementation of ORCID IDs, selection criteria for research information systems, assistance with research metrics, development of research data management services, and support for open education resources. It was agreed that it will be beneficial to continue to learn from each other and promote awareness of practices at each MNU institution. *Action: Create and maintain an Open Matariki web presence that describes the Open Matariki program and links to relevant information resources, events and services at each institution.*

2. **Broad principles**

   Various jurisdictions and organizations have developed statements of principles or policies relating to sustainable access to research outputs and scholarship, to guide strategic priorities and projects. It was agreed that given the different organizational and national context of each MNU institution, specific policies and principles reside in each institution, and any overarching statement about Open Matariki needs to be very broad and drawn from the MNU vision and mission. *Action: Develop a broad purpose statement for the Open Matariki program and link to relevant policies and principles at each institution.*

3. **Projects**

   One of the strengths of the MNU is the diverse contexts of each of its members and thus the international perspectives it provides. This fits well with exploring the scholarly communications landscape: advances will come from examining multiple facets of a variety of issues. It was agreed that Open Matariki is an umbrella for multiple projects that may be pursued by a single institution or a cluster of institutions, always with a

view to advancing our collective understanding of scholarly communications, research and teaching and learning across the network. We are "open" in the broadest sense of our interest in sharing and connecting on multiple topics. *Proposed action/projects (and more may follow):*

 a. *Explore how to lower the economic barriers to the creation and dissemination of academic publications, in several projects:*
  i. *Implications of a flipped subscription model*
  ii. *Measuring the cost and contribution to the scholarly supply chain*
  iii. *Unbundling the big deal*
 b. *Promote the responsible application of impact and productivity measures for research: sharing information on local and regional projects relating to research metrics*
 c. *Support the production of Open Educational Resources and pilot an open education textbook project*
 d. *Report on the number of OA publications with MNU co-authors*
 e. *Develop staff competencies for advancing research services*
 f. *Explore research-led teaching programs, such as integrating digital humanities into the curriculum*
 g. *Share strategies and best practices for preservation of digital publications*
 h. *Explore opportunities for applying information literacy resources/services to support academic efforts to close the gap between high school and university*

Open Matariki Phase 2, 2018

The three elements of the Open Matariki program outlined above will be developed in late 2017 and the first three quarters of 2018. Each of the MNU library representatives will consider the most appropriate project(s) for their institution to pursue, and will plan to share results at the Matariki Network Humanities Colloquium in Uppsala in late August 2018.

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