NISO Plus 2024 Track: Open Scholarship Collaborative Notes

Sessions

Open Access Books and their Infrastructure - Tuesday, February 13, 10:45am - 12pm

So much of OA discussion relates to journals. Yes we need related vocabularies across research outputs, but also new vocabulary for OA eBooks.

OA eBook Usage Data Trust. A trust network for data pipeline governance. Data spaces standards for sensitive OA Book usage data intermediation. Sensitive, proprietary, privacy-preserving conditions. Building on 2 billion in European Data Infrastructure Research and Investment. Interconnect our organizations and manage the data ourselves. Information sovereignty.

Jacqueline from Scholar's Portal. Some publishers have policy and technical reasons for not supplying all the OA metadata at granularity they can use. Some publishers do not distribute open access articles to Scholar's Portal. There needs to be some recommended practices here.

Item level sharing of OA eBook metadata.

CCC can accept article and chapter level metadata and use it.

The IP address about what you read should not be revealed. Recommendations for what can safely be used in authentication. Perhaps the Seamless Access folks do this.

Updates and corrections for OA eBooks needs to be standardized. Books that flip from closed to open.

Concept of data spaces for identification roles in a trusted network for OA eBooks. Focused data space.

Get more publishers COUNTER-compliant who are OA only book publishers. COUNTER costs money, but it is worth an effort.

Define metadata and usage stat collection goals with community input as to place of access. OA metadata so we can update in local library systems as access changes.

Open Scholarship and Bibliodiversity - Tuesday, February 13, 1:30pm - 2:45pm

The State of Open Scholarship in the Humanities - Tuesday, February 13, 3:15pm - 4:30pm

Towards open-data sharing solutions in the humanities and social sciences - Wednesday, February 14, 9am - 10:15am

Nature of data:

- Privacy (even if anonymized, often still possible to identify individuals)
    - Authorization of data access
- Human subjects or stars (textual analysis)
- State and national laws
    - No unnecessary tests
- qualitative/quantitative
- Ownership (researchers, else)

Challenge with data management, where is stored, permissions?

Data management policy to some part set by funder

Data openness as check on fraudulent research

Persistent IDentifer (PIDs)
NElson memo has lengthy definitions on PIDs

- DOIs
- ORCID

- Funding
    - Grant contract number
    - USA spending (not used)
    - To be determined/developed
    - ROR
- Timeline, guidance from DeptE in upcoming year, published research with required identifiers may not be seen for a few years

Uses cases of open data

- From published research, reference dataset, instruction: what other ways can the data be analyzed?
- ...

What auxiliary data elements are there to the research data

- Admin data - what format, what variables, how combined, - no standard, should there be, is it possible?
- Call for more data curators (and embedded throughout research process)

RIM/CRIS

- Uptick in internal data sharing

Ithaka report (https://sr.ithaka.org/publications/are-the-humanities-ready-for-data-sharing/ ?)

CARE / FAIR Principles
https://www.nature.com/articles/s41597-021-00892-0

Making Research Data Publicly Accessible: Estimates of Institutional & Researcher Expenses
https://www.arl.org/resources/making-research-data-publicly-accessible-estimates-of-institutional-researcher-expenses/

Ideas for collaboration:

Define data (for the humanities, it's not always clear what "data" is in this context—what needs to be shared per policies/mandates?)
Definitions and standard terms around this data, to be sure everyone is talking about the same thing when they share or submit to a repository

Needed standards: ROR, Metadata, Interoperability Crosswalks, Granular PIDs, Measurement of impacts, Ontology of open science, Corresponding author identification, Semantic markups, Citation protocols. Building relations between PIDs is needed. Machine readable data accessibility templates from publisher statements (compromises). Which affiliation is responsible for the OA underwriting of the article.

Open Science Blooms when we provide real incentives to people who make their science open. Tracking the impact of the research and especially use of the data for different purposes. How to count things on the societal impacts of research.

Future of open science needs sustained investment. Avoid adding too many new and conflicting science. Be more globally equitable by discipline, region. Researcher education on how to particpate. Streamline ways for authors to contribute.

Solutions for open science: Mandates to stimulate behaviors that authors might not otherwise have done. Together with tools and training.

The Future of Open Science - Wednesday, February 14, 10:45am - 12pm

Heather Staines (Delta Think) and Howard Ratner (CHORUS)

The data and results need to include the metadata

Need: Develop open and scalable infrastructure
Why open science:
- Desirable to society at large
- Improving scientific integrity
- Improving the efficiency of science
- Enhancing the process of scientific discovery

FAIR
- Findable (PIDS), Accessible (retrievable via PID), Interoperable, Reusable

PIDs - should be permanent links, data repositories
Data Management Plans - how research data will be preserved

Dada will increasingly be cited directly in publications
Researchers increasingly expected to use best practice

Publishers can help authors with compliance and best practices
- Data availability statements
- Data citations
- Journal policies and guidelines

ROR map - represent adoption of open access policies
- Initially funders such as the Gates Foundation supported open, now over 50 worldwide funders supporting

Need to know what authors have done with their data, not just that it exists somewhere.
- Be able to track provenance of the data

Plan S Update
OSTP - looked back on year of open science memo
- Strengthening policies
- Investing in Open Science Infrastructures
- Building Open Science Skills
- Engaging communities to broaden participation

aha slides.com/gdccj

Q1: Results: 7 institutions, 16 publishers, 9 service providers, 2 consultants, 2 researchers, 0 funders

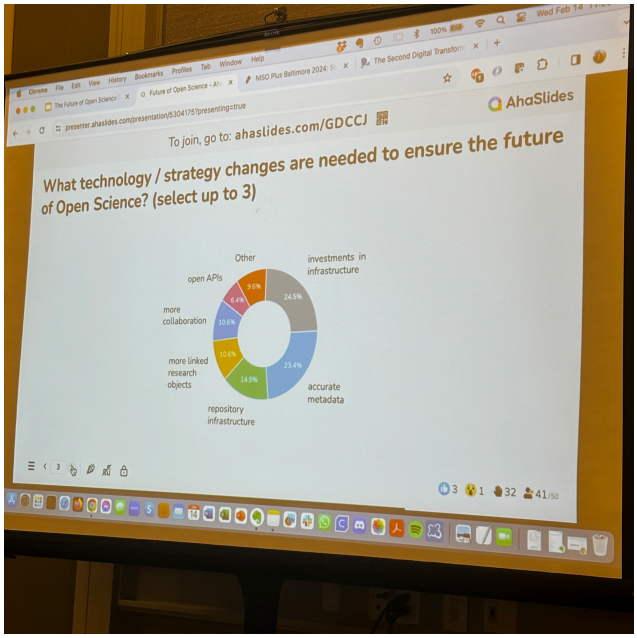
Q2: What standards will be needed to guide the future of Open Science
- CP:LD
- PIDs

ROR
Metadata
Interoperability crosswalks
FAIR
Semantic Markup
AI declarations

Ontology of open science
How to measure impact
Defining what are open science indicators, all speaking and measuring the same thing
“Breadcrumbing” AI generated information
Citation protocols
Guide for librarians to help with data management plans
Standard on interoperability
linking/connecting the dots… (Chris Shillum) - using PIDs is not enough but the connections to and with them)

There are a set up triples that should live outside of the document
Standards for corresponding authors - open access business processes
    Which of the publishers are the one with the deal?

How do we know if a manuscript has been checked for research integrity.
    What are the parts of the manuscript
How people are using AI - usage
What technology strategy changes are needed to ensure the future of open science
    Open source
Accurate metadata
    Accurate vs. comprehensive / Consistancy
    What might be a suggested change? CHORUS ingest PID metadata and question on accuracy. How good iit is is based on its usability.
    How do you ensure quality and consistency in open?
    *Capacity issue - staffing
    *Making sure corrections don’t get overwritten
    Metadata in a local repository is wasted effort
More linked research objects
Investments in infrastructure (even maintenance of existing systems, not just flashy new)
    COUNTER has ONE ½-time staff person
Repository infrastructure
Open APIs



What solutions are arising to help researchers achieve an open science future?

Mandates

AI for machine tagging and metadata cleanup

OpenAliex

CPLD and distributed pid structures

Funder requirements

Funding

Policy guidance

Institutional OA agreements

More ways to represent impact

More access

Better workflow for sharing data

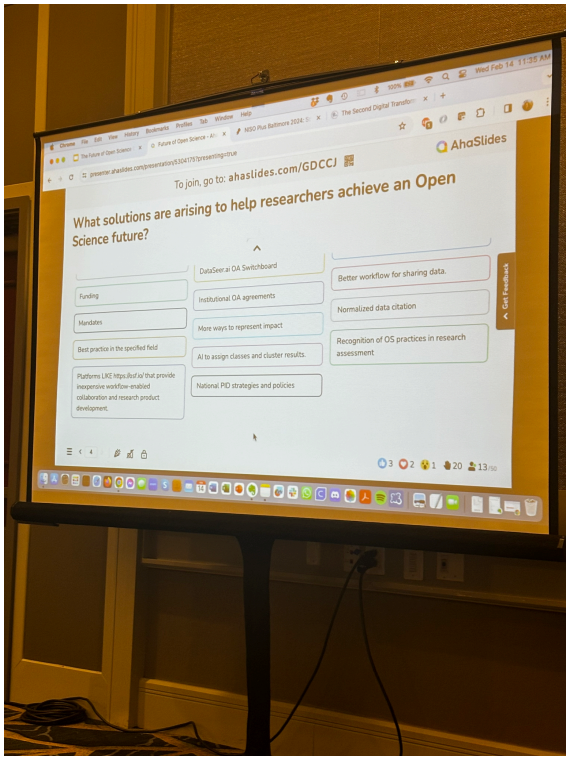
Normalized data citation

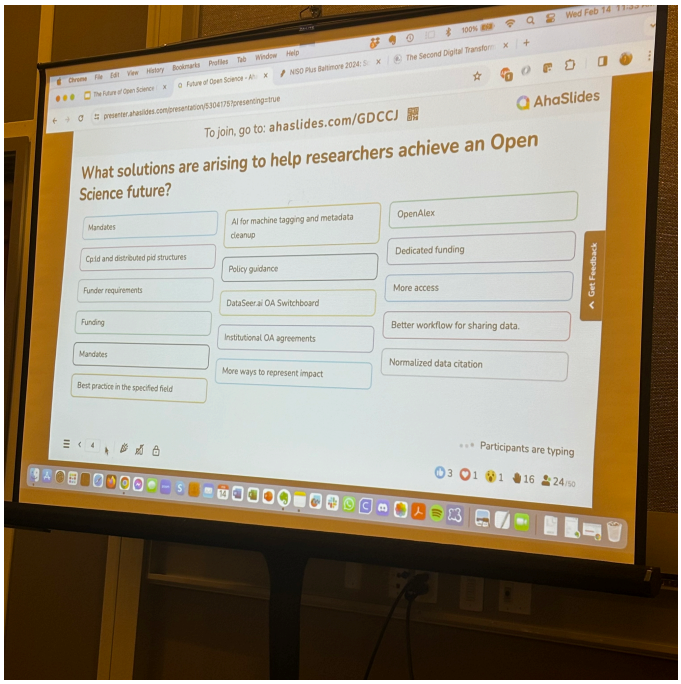
Recognition of OS practices in research assessment

Platforms

DataSeer.ai - does compliance checks (scans through the full text)

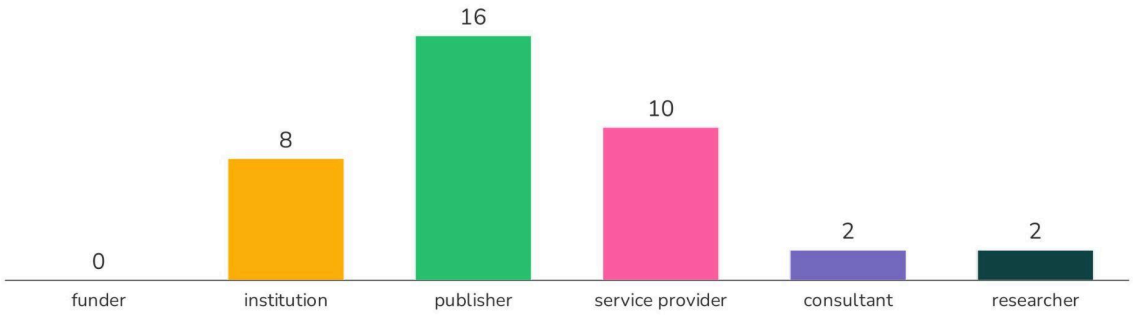
OA Switchboard - uses metadata / transformative agreements


AhaSlides
To join, go to: ahaslides.com/GDCCJ
What solutions are arising to help researchers achieve an Open Science future?
Funding
Mandates
Best practice in the specified field
Platforms LIKE https://sci.ai/ that provide inexpensive workflow-enabled collaboration and research product development.
DataSeer.ai OA Switchboard
Institutional OA agreements
More ways to represent impact
AI to assign classes and cluster results.
National PID strategies and policies
Better workflow for sharing data.
Normalized data citation
Recognition of OS practices in research assessment
Get Feedback


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Mandates
Cpld and distributed pid structures
Funder requirements
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AI for machine tagging and metadata cleanup
Policy guidance
DataSeer.ai OA Switchboard
Institutional OA agreements
More ways to represent impact
OpenAlex
Dedicated funding
More access
Better workflow for sharing data.
Normalized data citation
Participants are typing
Get Feedback

AhaSlides

Which stakeholder group are you from?



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AhaSlides

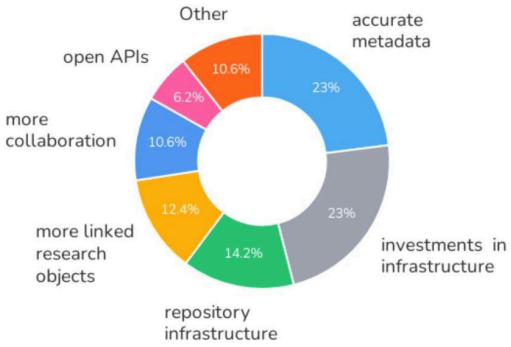
What standards will be needed to guide the future of Open Science?

- Cp:ld
- ROR
- Granular PIDs
- Corresponding author
- Metadata
- AI declarations
- Linking/connecting the dots...
- Citation Protocols
- PIDs
- Metadata
- How to measure impact
- Interpreting the new forms of usage by AI tools.
- Defining what are open science indicators, all speaking and measuring the same thing
- Standard on interoperability
- R
- PIDs
- Interoperability crosswalks
- Minimum metadata requirements
- Ontology of open science
- FAIR
- Semantic markup
- Guide for librarians to help with data management plans

3 2 1 22

AhaSlides

What technology / strategy changes are needed to ensure the future of Open Science? (select up to 3)



3 2 1 39

AhaSlides

What solutions are arising to help researchers achieve an Open Science future?

- Mandates
- Cp:ld and distributed pid structures
- Funder requirements
- Funding
- Mandates
- Best practice in the specified field
- Platforms LIKE https://osf.io/ that provide inexpensive workflow-enabled collaboration and research product development.
- AI for machine tagging and metadata cleanup
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- Institutional OA agreements
- More ways to represent impact
- AI to assign classes and cluster results.
- National PID strategies and policies
- OpenAlex
- Dedicated funding
- More access
- Better workflow for sharing data.
- Normalized data citation
- Recognition of OS practices in research assessment
- OA Switchboard

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Breakouts

What standards will be needed to guide the future of Open Science?

Back Table -

"Too many standards"

- Prioritization and potentially refinement of standards
- Research processes having better and earlier standards for tracking research outputs for finding maintaining providence (could be metadata PIDS...) and better adoption of these
- Distrust token - how do we identify or flag information that has been questionable
  Token for how to identify that information was generated by AI

* How to really get at the impact of research. How we go about counting the societal impacts

What changes are needed to ensure a future of Open Science

- Sustainable investment
- Resolve conflicting standards and don't add more
- Have an agreed upon open science
- How to track
- Be more globally equitable
- More differentiation between open and non open
- Research structure
- Researcher education - how to participate
- Streamlining how researcher participate
- Not letting perfection be the enemy of the good

What solutions are arising to help researchers achieve an Open Science future?

- Tools that incentivize sharing
- Training
- Services - infrastructure / training
- Mandates
- Promotion strategies, especially in academic environments

What can NISO do?

GET FUNDERS TO BE MORE INVOLVED IN THE CONVERSATIONS

Fund infrastructure, including existing infrastructure

Open Research Software - Wednesday, February 14, 1:30pm - 2:45pm

Changes in research culture - systems approach: required /rewarding/ normative /easy / possible

ROR - for research organizations ... good global coverage, CC0, open API ... relationships between organizations supported in the schema

Open model of community curation

Go to https://ror.org/search ... if you don't find what you are looking for, submit a request to add - about 9 people did find their organization, about 4 people didn't

Virginia Tech ... Virginia Polytechnic State Institution ... search engines using text strings for affiliations 😕

Metadata is meant to be exchanged between systems ... good and bad metadata travels

But using identifiers makes it easier for trustworthy metadata to be used

Open research powered by open PIDs

Research tracking tools ... when they are open and visible, is an incentive for good metadata and submitters of this metadata

OpenAlex

Generalist Repositories Landscape - growth in use of services provided by generalist repositories - GREI: generalist repositories ecosystem initiative

Incentivize to work together - data management and support better search and discover of NIH funded data.

Establish a common set of cohesive and consistent capabilities; raise general awareness to help adoption of FAIR principles

Connect digital objects

FAIR data priorities at NIH ... outcomes/impact: make data sharing easier; improve discovery; increase reproducibility; encourage secondary use of data

Tim Vines: NIH's new DMSP

DataSeer - open science metrics across a corpus

Open science snapshots

Compliance checks for individual article - catalog data sets associated with an article

Dryad - open data publishing platform & community ... improve infrastructure for community standards - extend this model to other communities?

Capture funding metadata - displayed on publication page

DataCite metadata schema

Funders can find and export data

How to build norms in research culture? Perpetuate the norms across infrastructure providers

Culture changes that we hope to see
How to catalyze?

What are the biggest challenge you face in open research?
Ishwar: everyone thinks it's everyone else's problem. We each have a part to play even if it's small
Tim: practical - monitoring open science - restricted to open access, but OS applies to subscription too. 2) generate accountability - get to researchers and tell them what they need to know and tell them that we can tell whether or not they are doing it.
Amanda: image of 3 legged stool from Ed's talk yesterday. ROR is seeing a lot of adoption. But unlike ORCID reliant on being adopted into systems. Data is centrally curated, not reliant on organizations to maintain. But systems must integrate ROR. Need patience, wish it were going faster
Nadja: help folks to understand level of effort required to make research discoverable by humans. Description to enable machine assisted research. Money!

Q. what benefit does ROR have over existing registries like Ringgold or Crossref Funder Registry?
A. Open! CFR - open data but curation is closed. Crossref is transitioning it to ROR. Ringgold is proprietary and data is not licensed to be open. Not really resolvable.

Q. re convening ... it's hard and take time and resources. Important to get a mixed reflection of the community into the room. It's not really NIH's role. Glad you've taken it on. How do you get orgnizations to take responsibilty for convening and how to ensure good output?
How to create ownership. How do you replicate this?
Ishwar: want to replicate this, use this as a model. Develop components that others can use.
Noteworthy: Metadata model that can be used across repositories. Partnership with DataCite.
In Metrics, partner witih Scitation Index, standardize how downloads/views will be counted.
Hope is that we can have a huge impact ino ther repostories leveraging.
NIH funded repository PI meeting, learn from each other. Generalist repositories will showcase data curation and sustainability. All about incentives, not just for one stakeholder type but across all stakeholders

Q. Wanted to see COS platform. OSF framework. Consultant in Open Source intelligence - methodologies to inform product intelligence . Many use cases in mind.
Do 3 letter govt agencies approach you to make inquiries or make improvements to products?
Amanda: yes. Has spiked up. Primarily on curation. DOE, ensure sub agencies are represented. France, Portugal, NASA has a repository. Want changes to records and relationships. Had a schema revision group. Some product requests. DTIC. Want to map Unique Entity Identifier. Analogous European one.
Q. Has someone already discussed a federated search interface to all this stuff? Could NISO do this?
Nadja: Value line is important. Collaborate on things that are not competitive. Open metadata means you can build your own interface.

Q. for Amanda - an international registry is ambitious, each country is so different. Different management structures within each institution. How to keep this info up to date and correct? Quasi research orgs may be fleeting if they dont' get funding they are gone. Preserve the history of each research org?

A. We don't. We have org hierarchy but specifically in the case of universities we don't' capture every unit. Need some form of independent funding from university. Don't track schools or departments. Controversial aspect of ROR! 3 years of discussion before it launched. Of course you want to track research at department level but the highest level is not solved yet. In France, the ecosystem is extremely different from US. They have mixed units... labs can be associated with multiple universities. Keep ROR easy to use. The more granular a registry is the worse the data becomes and harder to maintain. May try to set up some extensibility feature to allow orgs to manage their own hierarchies.

Q. What's your vision for 5-10 years from now?

A. Transform the process of research

A. Clean and consistent metadata ... make it cheaper and easier for people to track research.
A. Need a clearer picture of the value chain in academic publishing. Re open science, if articles are accompanied by their data sets, code, etc. and are reproducible, that will move science forward. Open science is a cure for misconduct. There is a mismatch in the value chain currently. Publishers can make a difference. They have a workflow for article production but they don't' have any economic value from open science. No immediate benefit. Funding agencies are putting so much money into research but peer review is a closed confidential system where there is no view. Only see articles published after the fact after leverage on authors is gone. Have a publisher see articles from a particular funding agency and enforce

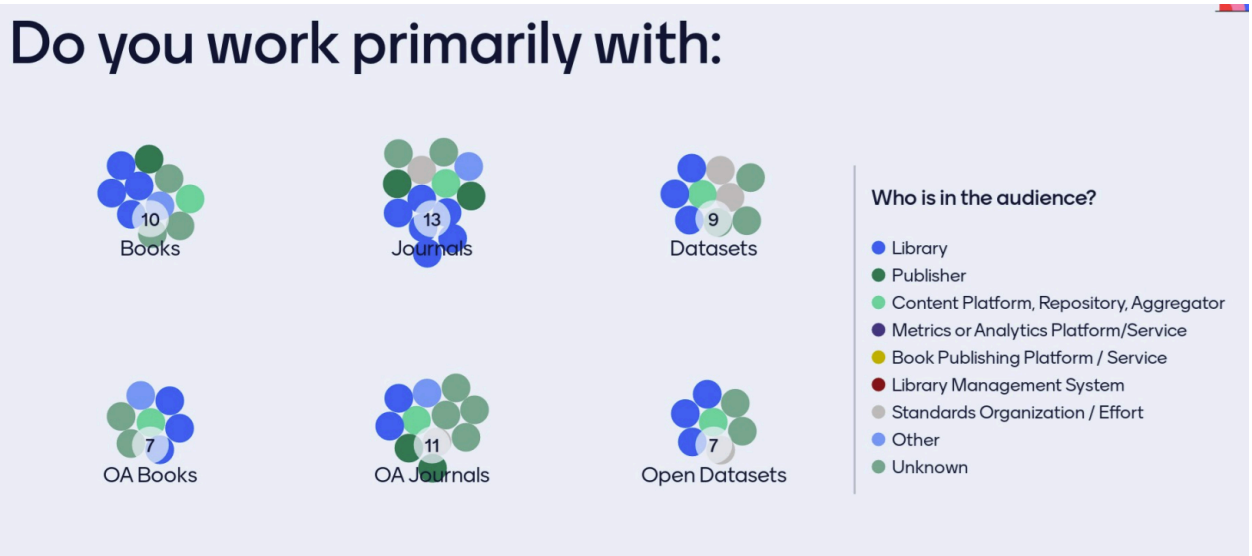
funding restrictions. Will enable funding agencies to communicate policies to authors in a process where they will do it. Will have a seismic effect.
A. Make it inherent part of activities. How do you make it easy and how do you incentivize. We have a policy and requirement but still need incentives.

Q. There is a new ecosystem. Challenging to do so many things, who is doing it? For all services, open source or paid, who will pay the bills and execute the requests. Provosts, VP research. At campus level, in order to secure open source. But stakeholders - who can provide direction.

A. Librarians were dismissed 15 years ago that they were truculent. Now joining Dryad and shared with provost and research integrity office. This is fantastic that librarians are no longer alone. Many cross campus stakeholders engaged.
   A. wish there were more collaborations between Office of Research administration and libraries. Has to come from Provost level. Ex Mandated reporting to be done via Symplectic Elements. Using different systems. How to use automation? Provost was determined to have an accurate count of what is getting produced. Makes sense for it to be a collaboration between the libraries and research units.
   A. Needs to be collaboration. Some core facilities are starting to take roles, work with office of sponsored projects to lower the barrier for standardization and easier management.
   A. improve brand by promote open science internally. This is what you need to demonstrate your output.

Open Access Books and their Infrastructure

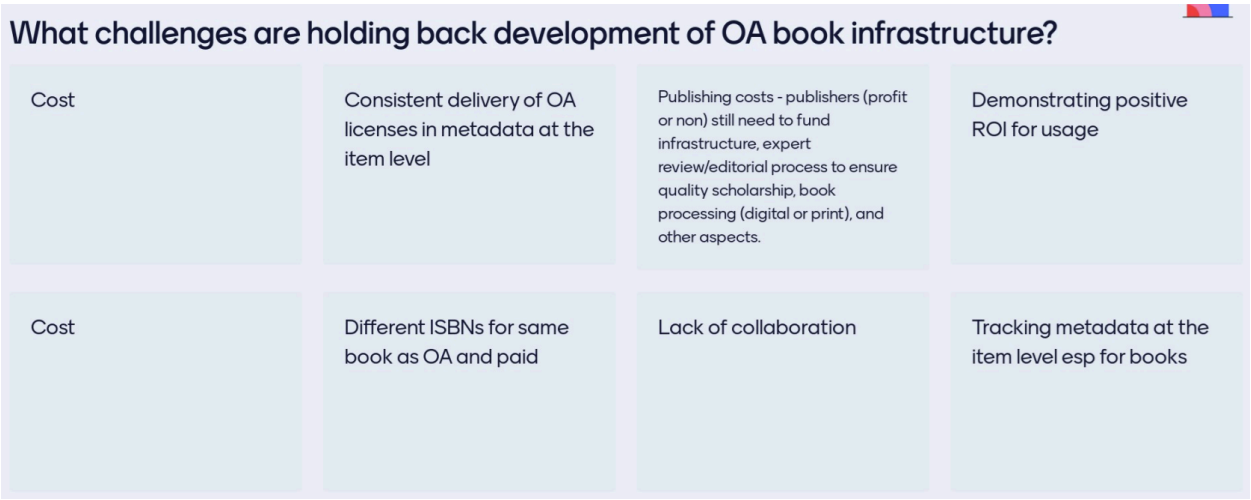


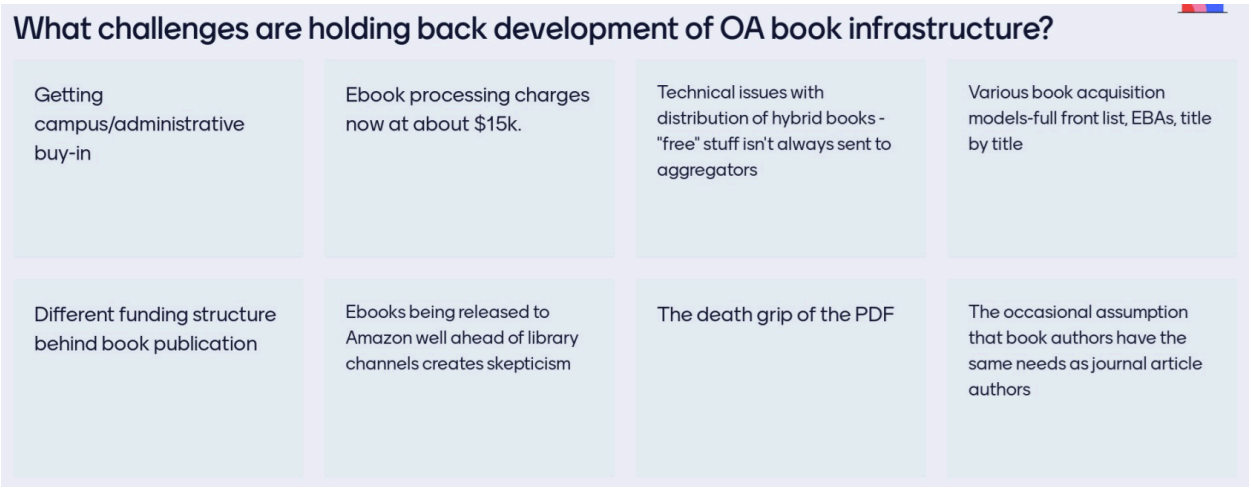


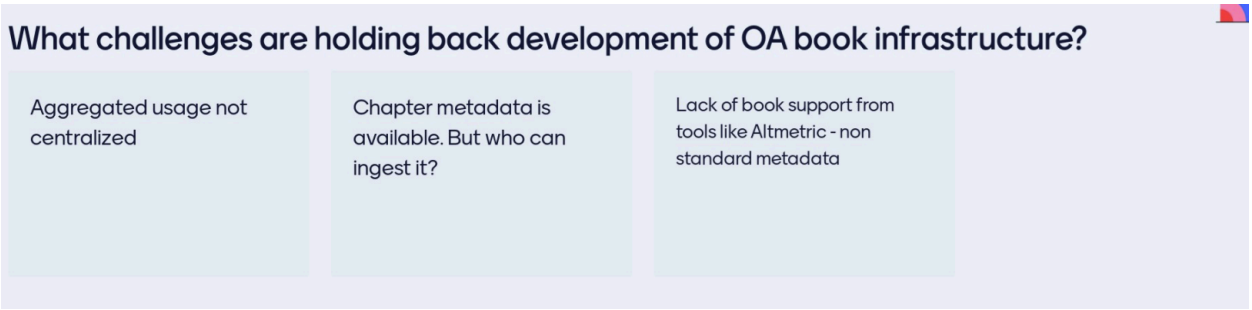
Ecosystems and Infrastructure: Continuing Evolution in OA Books

- Metaphor - El Nino - complex and global system, different areas affected differently
- Move towards OA - a lot of acceleration comes from funding mandates, but these are heavily towards journals
    - Plan S - article funding, but also journal business model
    - Open Access sometimes, often “publicly available” - not everywhere
    - Plan S for Books? “Standards and funding needs time to catch up”
- Books are not “behind” journals, they are different.
    - Books are one-time purchase, publisher makes back investment in first few years, not ongoing

- Books are much more research and time-intensive to produce
- Primary research output in some fields (humanities), a secondary output in others. Articulation of the argument *is* the research
- Books are distributed through many platforms and formats, trying to reach as many buyers as possible quickly
- Rely on institutional *and* individual buyers - not just institutions







- Oxford Brookes University - study on monograph publishing trends (2021)

    - 80% of publishers had an OA program
    - Usually <10% of monograph output
    - Most OA programs were not separate imprints
- Early example - KU Backlists
    - Didn't affect revenue (because backfile) but needed to go back and do a lot of licensing work for older images, tables, etc.
- TOME - Towards an Open Monograph Ecosystem
    - 5 year project funded by institutions
- SHMP - Sustainable History Monograph Pilot
    - Supported by University of North Carolina Press distribution channel
- New models
    - Direct to Open (MIT)
    - Fund to Mission (U of Michigan)
    - Opening the Future
    - Business models focused on recurring participation rather than one-time sales in order to support ongoing OA
- What are metrics for success?
    - COUNTER is oriented toward your institution's use, to support subscription decisions
    - But if you want to support OA with the goal of making something world-readable, you need a different metric
    - How do you get that data?
    - Some authors care about extremely short-term metrics
        - How is my work doing on social media, because that influences the topic of the next book I write
        - Is my work subject to a disinformation campaign
        - They need data *now* in a way that may not be consistent with available metrics
- ISBNs are hard
    - Some outlets don't support a $0 price point
    - You may need to issue a new ISBN to support the free version of the book
    - Now you have separate metrics for free and paid versions of the same book
    - Sometimes you have OA chapters in a closed-access book!
- "There's policy reasons and technical reasons we're not getting open content, and the technical reasons feel silly, but no one will fix them"

What is your top challenge when supporting usage data analytics and reporting?

- Fragmented infrastructure
- Counter compliance for books is...hard. We're counter-like
- Industry buy-in! Publishers need to see the value of the data.
- So much data, so little reapurces
- Lack of standards and consistency. Context is lacking.
- Author-facing data has no context for the authors (they have no benchmark)
- Defining what's actually important to each library is one challenge. For example, my library cares which publishers/platforms' OA books are most used by staff so can choose what to co-fund as needed
- Lack of consistent metadata for tools like Altmetric to support

What could you do differently if you had access to usage data flows direct from usage data creators

- Add context! Shape practice.
- Better focus resources and efforts to capture and share the data
- The usefulness of a channel viability could be assessed
- Understand our scholars practices more quickly
- 2 way communication and information flow - dashboard - open syllabus project data
- Custom book building for classroom use
- Type of engagement with the content
- Local promotion.

What could you do differently if you had access to usage data flows direct from usage data creators

- understanding when/where local researchers engage with OA content since they can access from anywhere (including off local systems)

Q&A

Question asked

Many folks don't realize that OA publishers are typically not COUNTER compliant. How do we get them to commit to that?

Discuss the metadata on the item level around monographs. It's difficult at times for journals. How do we avoid that for books?

Where do we come together to continue this discussion ?

Is there metadata for updates and corrections to books?

Understanding how OA monographs used in [local, funded] research community so informed decisions can be made about how funders/institutions should support key publishers/platforms as models change

How can NISO help?

Encourage adoption of OA data sharing at the item level as well as the title level

Not specific to OA, but metadata around updates and corrections is virtually non-existent and it would be so helpful. Can this be standardized?

Define metadata/usage stat collection goals with community input: place of access (to degree permitted- org, user, geo) . OA metadata so we can update in local library systems as access changes

Open Scholarship and Bibliodiversity

- **Dr. Nokuthula Mchunu** - supporting diverse language needs for open resources (important for localization needs); titles & abstract in common languages;
- **Maureen Walsh** - Transforming scholarly publishing @ Ohio State; OA puglishing agreements, oa monographs, open scholarly infrastructure, diamond oa focused on consortial and campus partners and author's rights; over $4M APCs waived for 1,471 articles published OA; investment in open monographs; https://library.osu.edu/transforming-publishing
- **Nataliia Kaliuzhna, Research Associate at TIB** – Leibniz Information Centre for Science and Technology, and PhD student at Kyiv National University of Culture and Arts; IDentificAtion of hurdles to open access publishing for researches with weak institutional ties – epistemic injustice in scientific publishing; starting with comprehensive lit review of barriers and challenges faced by researchers with weak institutional ties in open access publishing; conduct qualitative interviews with researchers and publishers; Weakly affiliated = independent researchers (no org affiliation, in transit between institutions, retired, etc.), refugee scientists, researchers from citizen science domain NGO, researchers(?), industry researchers; https://projects.tib.eu/idaho/en
- **Katharine Witzig**, is a metadata expert from the Oklahoma City University and a student at the University of Illinois Urbana-Champaign: Respectful partnerships for more inclusive practices; Oklahoma library association committee for tribal libraries, archives, and museums; created web-accessible resource list, support tribal librarians, support librarians serving indigenous populations; tribal nations are varied and serve diverse user bases; task group for metadata related to indigenous peoples of NA, recommendations for updated LOC classifications and SH; encourage reparative and inclusive metadata practices, utilize input from professional community; how to best capture indigenous metadata and make it useful to indigenous users; linktr.ee/katwitzig
- **Michael Chimalizeni, Metadata Specialist and Consultant located in Zimbabwe:** Local action to stay on the cutting edge OR we don't want to get left behind; consulting with vendors, keeping up with modern standards; more focus on tech vs. content; introduce and advocate for assistive tech (90% of visually impaired people resident in developing countries, 1 in 10 chance of going to school or finding employment; awareness raising webinars, running community of practice on whatsapp to get ideas and brainstorm accessibility practices, discussing funding models, investigating resource sharing models, encouraging publishers to take training with ABC; Research4Life – initiative to provide lower income countries with online access to peer-reviewed content (WHO, FAO

UNEP, WIPO, ILO);

- **Mohamad Mostafa, Regional Engagement Specialist, Middle East and Asia at DataCite:** Advancing equity and accessibility: DataCite's global access program; community includes 3000+ repos, 52 countries, …; challenges for global adoption: low awareness of value of PIDs, lack of infrastructure, lack of policies/practices, technical gaps and financial barriers; launched Feb 2023, funded by Chan Zuckerberg Initiative, improve equity and access to PIDs; three components: outreach, technical infrastructure, funding; outreach – increasing collaborations with local communities, delivering regional webinars, launching DataCite ambassador program, finalizing framework for DataCite Consortia Partnership program, providing case studies on how stakeholders use DataCite; Infrastructure – analyzing landscape in different global regions; TOgether towards Global access; 4 new direct members, 1 consortium in Africa, 28 new consortium orgs from Asia, Latin America, Africa; increase in repositories overall; big growth in DOI registration; "create a more equitable and inclusive research ecosystem"

African open science platform – three nodes East Africa, Southern Africa, North Africa. Southern Africa node trying to create repository w/data support. Wanting to support local languages as well. (Has subsumed AfricarXiv). A number of different languages in abstract and title (using AI). Using ORCiD to promote PIDS and DOIs in the continent; research output w/local context.

Maureen Walsh (The Ohio State U, a large public research university w/strong commitment to land-grant mission). Consortially & institutionally directing funds towards OA. Values-based collection development. Pilots & experimental models that transform scholarly publishers in globally relevant and equitable ways. Supporting OA monographs balancing funds supporting Ohio State authors and greater-good in open ecosystem. **How can N. American universities best support their own researchers & those across the globe?**

What can NISO do? Best practices/Standards/Education Program?

How to consolidate insight into these wonderful, but siloed efforts?

Heather Staines encouraged people/representatives of organizations to participate in Force 11 and CocoFoundation (Adam Hyde) (set up own webmeeting and promoting)

Maybe NISO can facilitate a resource page on global open efforts

What are the unintended consequences? What happens with an institution leans towards open in a particular direction and how does that decision impact down/upstream?

We may be at a point where we need to look outside of the box of how scholarship communication has worked to do but needs to work now?

What are global needs?

Support bibliodiveristy by being open

How can we also open the publishing side? Unlock some of the gates.

Dilemma: What is bibliodiversity?

What is the biggest challenge?

Indigenous community: reclaiming identity and language

Low levels of awareness & lack of knowledge in technical prowess

Not shaming or rigid, but emphasizing the positive

Funding

Trust

How do we share without negatively effecting globally positive outcomes?

Thinking about the way WoS indexes SciELO (w/metadata in original language and in English) and other regional citation databases and wondering if that multilingual indexing model could aid at least the discovery of bibliodiverse content, such as that in the African Open Science platform? – Nicky

The State of Open Scholarship in the Humanities

- Maria Stanton & Nicky Agate
- Thinking about the whole lifecycle - Pre-prints, open peer review, finished product, etc.
- Maria notes that we value some of the principles underlying “open science” - transparency, accessibility, etc. – these are important to the humanities, not just sciences
- Humanities are operating from a scarcity mindset - Nikki explores how humanities scholars may exacerbate that situation themselves, by thinking of theirs as a solitary profession
- She looks to digital humanities for the pathways that can lead to a more collaborative and generative approach to open scholarship
- Supporting open scholarship will require a different process
- For example, in the digital humanities, open peer review is more common

- Emphasis on process over product is more common in dh; a new way of thinking about research for many in the humanities
- Preprints not fully embraced in the humanities
- Concerns about committing to technology/services to support open scholarship for the humanities on campus (where will the funding come from/how can we ensure these services are sustainable)

Idea: there are open peer review guidelines for monographs (AUPresses helped develop), but there are none for open peer review in humanities *journals* - Peter Berkery says he would be interested in working with NISO to develop

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Towards open-data sharing solutions in the humanities and social sciences

What does data mean to you in the context of the humanities and social sciences? How does this differ from the approach to data in medicine and sciences?

- When working with children, unlike medicine, outcome data is via assessment, owned by the districts and states. This is not researcher's data to share - can't post publicly. So, how do we make information open? A lot of tension about how to make as much info as possible open, but students need to be protected. Working to develop guidance, but really starting from scratch.
- NEH is not providing as much funding as NIH.
- Conversations and general knowledge sharing, in addition to content sharing, is important. Thinking about expanding access to journal and book content, but not dismissing other research outputs as being valuable (i.e., ingesting more and more IRs).
- Humanities scholars don't always use the term "data" - they are using other terms and sources.

What are the barriers and challenges to sharing data in the humanities and social sciences?

- Protecting students is paramount. IRB approval or a letter determining you don't need IRB approval - data is specific to children and heavily guarded. Data management plan can be shared, but not the data itself.
- A challenge is getting the the right people in the discussion, as many lean towards collaborating with hard sciences.
- Authors have to defend themselves because they are leveraging a lot of papers throughout their research and don't know how those papers were produced - don't have the information/approvals they need to allow their research to be open.
- Institutions are spending a lot of money to comply with data sharing policies.
- Researchers cannot hang on to student-level data once they are done with it. Must be a good steward of data and delete or return when done with it.

PIDs - what ones do you use and, specifically, those that are not DOIs?

- Federal community trying to decide which PIDs can be used. Not sure yet, but moving towards meeting the requirements in the Nelson memo.
- Challenge: A community that generally rejects metrics and identifiers and dashboards, etc. Workshops on campus around research impact not generally attended by humanists. Not interested in the technical infrastructure and standards. Libraries and funders need to do a lot more to educate the researchers in the humanities.

- A lot of fields (history, for example) have objective data that could be shared, bit not a lot of statistical analysis, so discarded and not shared. Lot of the systems are set up for stats, so not a lot to share within those formats. Data is different across disciplines.
- Don't have a framework for collecting data, analysis, "how-to" file, etc. - difficult to convey information to others, aside from conversation.
- Tenure is given for certain research output but certain humanities output we're seeing / discussing is non-traditional and may not be supported as far as promotion and tenure goes.

The Nelson memo requires that datasets tied to publicly funded research must be made available in five years (even if the research has not yet been published). What challenges does that pose for researchers?

- When hiring, a desire for open access should be clearly listed and defined in the job description so committee members are expected have a solid understanding of what Open means and not seeing it for the first time when giving approval/making decisions -"get with the times". Is there a possible connection to the work of HELIOS here?

Possible areas for collaboration:

- Creating standards for data output in this area

The Future of Open Science

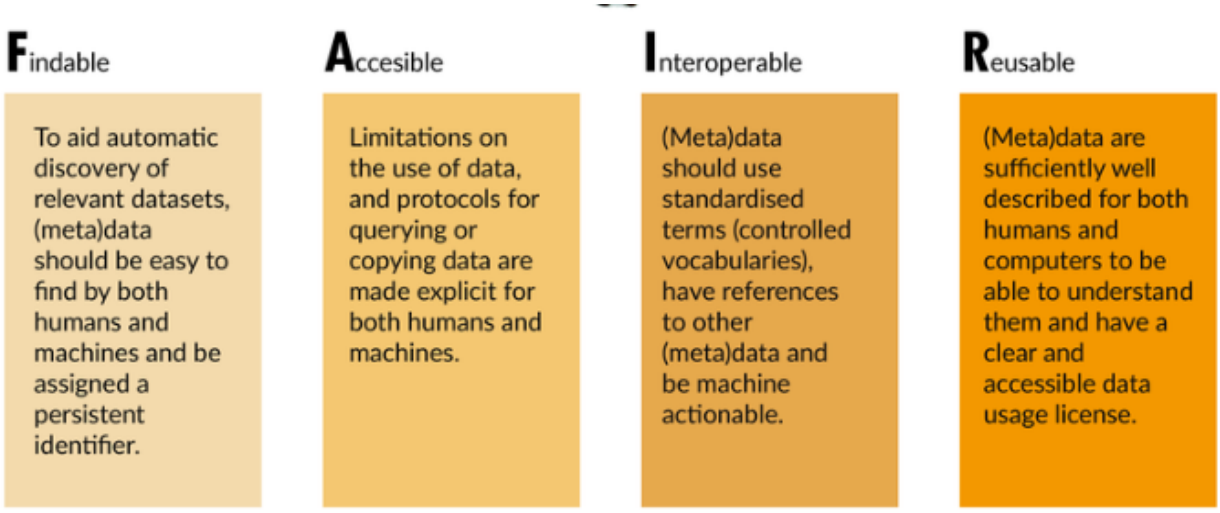
Why Open Science?

- Desirable to society at large
- Improving scientific integrity

- Improving the efficiency of science
- Enhancing the process of scientific discovery
- Making science more responsive to society needs
- Saving costs and delivering economic benefits
- Changing the practice of research
- Changing rewards

FAIR Principles

- A set of guiding principles for research data best practice and policy setting
- Adopted by most funding agencies
- Publishers need to follow these principles to formulate credible and compliant data offerings



Source: https://dmeg.cessda.eu/Data-Management-Expert-Guide/1.-Plan/FAIR-data

Common Data Sharing Requirements

PIDs

- Data should be made open via permanent links
- Links should be discoverable by catalogs and search engines
- Restrictions (e.g., privacy) allowed if justifiable
- Use of data repositories

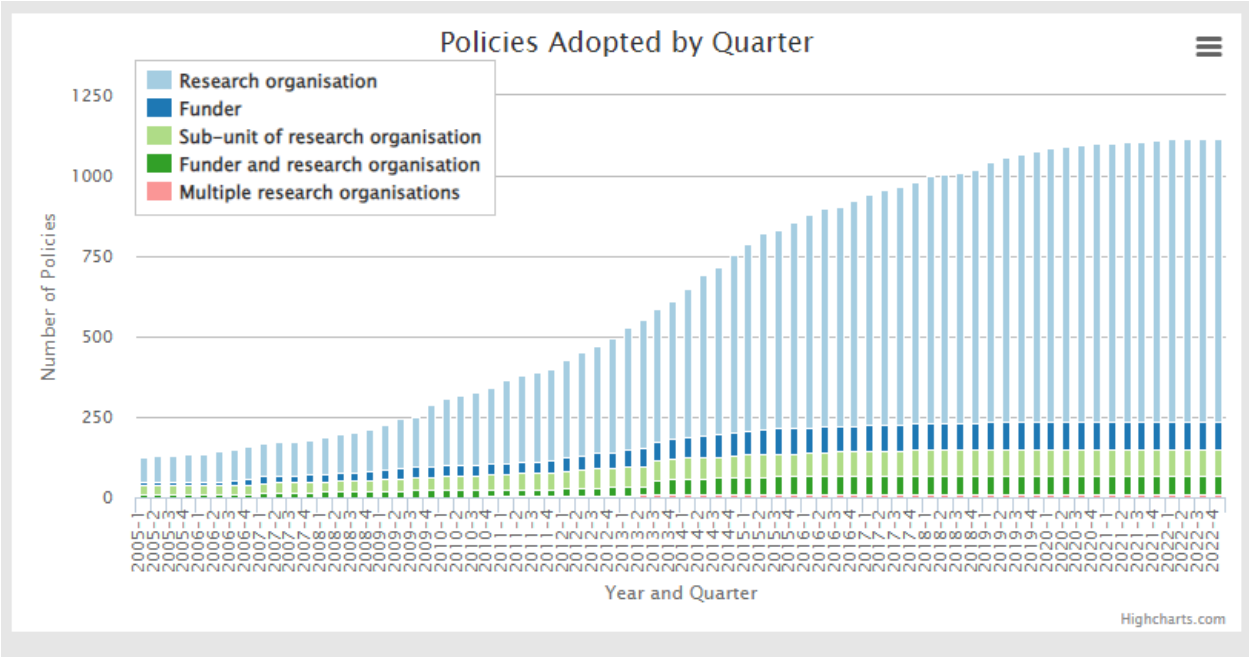
Data Management Plans

- Details how researchers will provide longterm preservation of and access to research data
- May affect authors' submissions

Publishers and Open Data

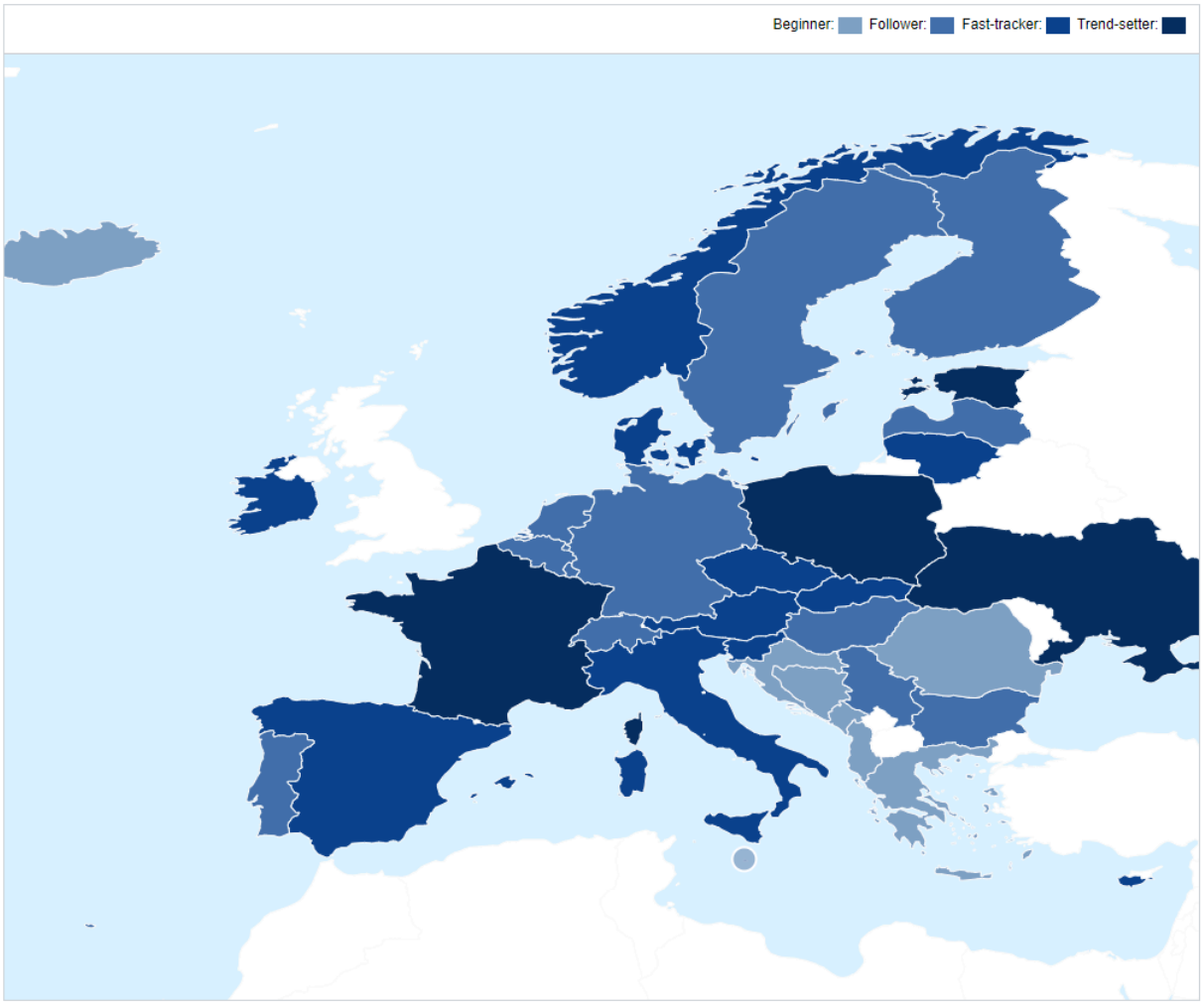
- Data will increasingly be cited directly in pubs.
- Researchers increasingly expected to use best practice
- Publishers can help authors with compliance and best practices
    - Journal policies and guidelines
    - Data citation
    - Data availability statements

[Registry of Open Access Repository Mandates and Policies](#) ROARMAP



EU Data Maturity Map

https://data.europa.eu/en/publications/open-data-maturity/2023



European Policy - Plan S Update

- Spearheaded by coalition S
- 1/26/2023 - Coalition S confirms support for transformative journals will end after 2024
- 1/25/2024 - Are Open Bibliometric Sources Better than Proprietary Ones?
- 1/11/2024 - Towards a Federated global community of diamond open access
- 1/17/2024 - Journal Comparison Service: 2022 Data
    - Publishers increased but remains low; Number of journals in dataset fell by 23%
    - Transformative deals are not ending anytime soon

OSTP - 2024 White House Memo, 1/31/2024

- Strengthening Open Science Policies

- Investing in Open Science Infrastructures
- Supporting the Research Community in Building Open Science Skills
- Engaging Communities to Broaden Participation I OS
- Promoting Incentives for Open Research Practice

- What standards will be needed to guide the future of Open Science?
  .
- What changes are needed to ensure a future for Open Science?
  - Definitions for researchers. What is Open Science? Is it all or nothing? What actions constitute Open Science?
  - Structural changes across our community. Do we have the resources to fund these changes? Need to reallocate the money (unless there are some really generous people out there).
  - Making research available through access.
  - Incentives for researchers to participate in open science.
  - Better publicizing where research is available
  - Open methods and protocols
  - Change ideas about ownership of data and research outputs (example of the astronomy community and open telescope data)
  - User/researcher education but also streamline and automate processes/infrastructure to get information associated with research outputs as easily as possible. Don't let perfect be the enemy of good. (Open Access Book Toolkit, Christina Emery)

- What solutions are arising to help researchers

Open Research Software