TO FOLLOW-UP OPEN ACCESS POLICIES
WHAT TO MEASURE, HOW TO DO IT AND WHO TO TELL

INTRODUCTION

The implementation of open access has gained momentum in Sweden with policies being adopted by universities and funding bodies. Representing two organizations with policy decisions from 2010, we now face the question how we should evaluate the impact of the policies. It is clearly important for us to be able to measure and to evaluate the progress at the early stages in this process. We also believe that different stakeholders – university management, research group leaders and the individual researchers – will benefit from different kinds of feedback and that we should be able to provide adjusted indicators for these groups.

At Chalmers University of Technology, research and teaching are conducted on a broad front within technology, natural science and architecture. Chalmers has about 11 000 students and 2 300 employees.

Malmö University's educational profile and subject areas are mainly social sciences, odontology, humanities and religion, medicine and interdisciplinary research areas. Malmö University has about 24 000 students and around 1 400 employees.

Both organizations have been working with the preparations of the policies over a long period of time before the actual decisions, which were made by the President/Vice-Chancellor at the two organizations.

The policy at Chalmers is mandating open access copies in the institutional repository as the general rule by making Chalmers research freely available. Malmö University's policy covers open access in the same way, but also consists of a mandate for open access to local publication series.

MEASURING OF IMPACTS AND BENEFITS

Typical indicators of interest would be:
- *Total amount of open access publications*
- *Percentage open access publications*
- *Publication types / open access*
- *Papers in open access journals*
- *Visibility in Google/Google Scholar*
- *Development over time, monitoring progress*

MEASURING DIFFERENT LEVELS

Typical levels of interest would be:
- *Individual researchers*
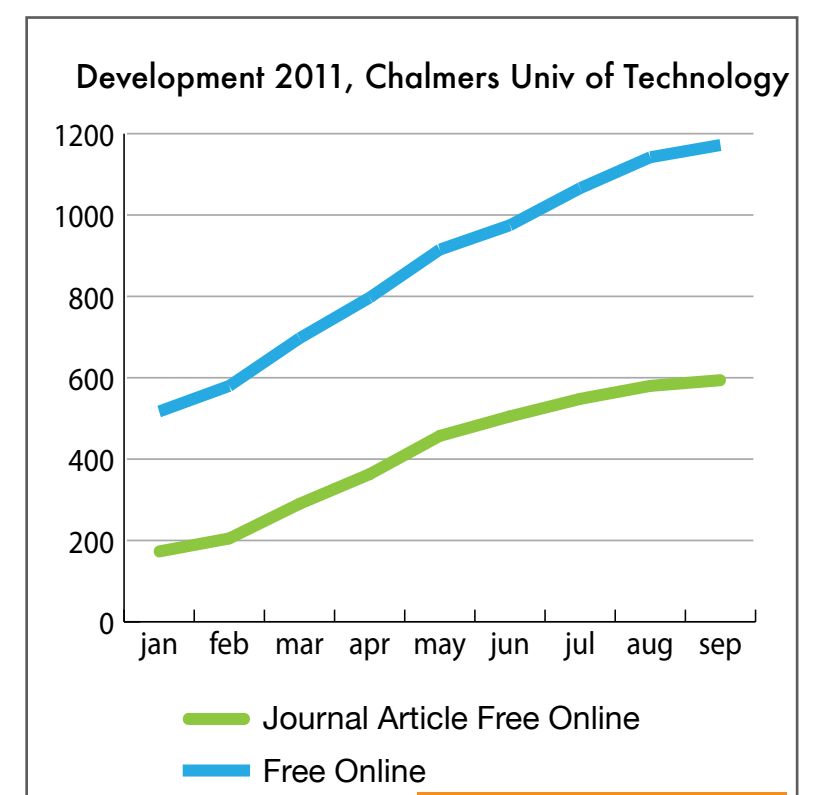- *Research units and departments*
- *Organizations*

Chalmers: In the interface *Publication profiles* the collection of publications, open access publications, publication types, co-authors, main sources etc. are presented and easily viewed. The information can be displayed on different levels for departments, research groups and individual researchers. This service is still in a developing phase and is not yet suitable as a tool for statistics. The Library regularly monitors the development of open access publication on different levels in the organization even though this information is not yet implemented in any formal work flow or reporting system.

Malmö: The Library delivers data upon request on departmental level from the publishing system. In the proposal for an implementation plan, we suggest that the responsibility, goal-setting and follow-up activities also lie on faculty level. Every department's plan of action should follow-up on e.g. the initiatives made to increase the department's level of knowledge regarding open access, the number of articles published in open access journals. The library will be a supporting partner in this work.

Development 2011, Chalmers Univ of Technology

Legend: Journal Article Free Online; Free Online

Monitoring progress at Chalmers

PROVIDING FEEDBACK

Researchers
Researchers typically would like feedback that focus on:
- *Visibility*
- *Usage*
- *Impact*

Management
Policy making needs systematic overviews and support by reliable information sources and quantitative indicators. Decision makers need feedback to make appropriate decisions about strategy and policy.

Examples of questions that could be answered on the basis of this feedback:
- *How effective have our strategic decisions been regarding open access?*
- *Do we need to adjust our focus?*
- *How can we best allocate resources?*

Stakeholders
Funders, for instance EU OpenAIRE

An important aspect of visibility, and to some degree impact, is being indexed by Google and Google Scholar. Both organizations' repositories are well indexed by these search engines. Chalmers and Malmö deliver data from their repositories to the national database SwePub. The database can be used for an overview of what is published in different research areas, to get titles in full text, abstracts and citations. The data is processed for a search service and not for statistical needs.
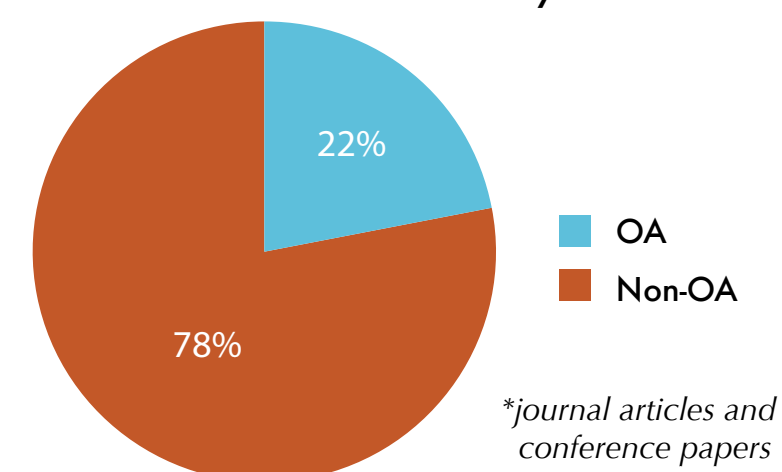
Both organizations have groups working with the responsibility of management. At Malmö, group members come from different departments at the university and from different organizational levels. It is partly this group's responsibility to assure that the policy becomes implemented. At Chalmers, the group consists of persons from the Library, the Communication and Marketing office and the Central Administration office. At Chalmers there is a regular dialogue between the Library and the Vice-Chancellor about issues concerning the policy.

Total amount of OA publications* 2010, Malmö University

22% OA
78% Non-OA

*journal articles and conference papers

Measuring OA at Malmö

This author publishes Open Access (Number of OA publications currently in CPL: **40**)

(Read more about Chalmers Open Access policy)

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FUTURE PLANS

- *Adapting and improving existing indicators (reports, visualization, presentations etc)*
- *Developing and applying new indicators (bibliometrics, interviews, downloads etc)*
- *national/international comparisons and benchmarking*

Where should these tools be placed? Where are stakeholders interested in having them? Should every university provide funders and stakeholders with reports, or should statistics be collected on e.g. a national level?

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