Programme

Contents

Note: Title, abstracts and presenter in order of appearance.

Day One

Time	Session	No	Details
Tuesday 3 August			
11:50-12:00	Exhibition		Delegates login and explore virtual venue and move to exhibition hall
12:00 - 12:05		E	Exhibition open welcome address - Nora Buchanan
12:05 - 12:45			Exhibition time
12:45 – 12:55	10 Minute Break		Allow attendees to move from exhibition hall to plenary room
12:55 – 14:30	Session 1: Exploring Digital Disruption (Session Chair - Laila Vahed)	1.1	Opening / Welcome - SANLiC Chair - Laila Vahed
		1.2	Keynote speaker "Sustainability in the higher education sector" - Prof Tawana Kupe
		1.3	The Post Pandemic Boom - Abdullah Verachia
			Q&A
		1.4	Two years, two disasters - Jillian Clark and Caroline Dean
		1.5	The influence of COVID-19 in meeting academic library users' online information needs: the case of a South African university library - Ruth Hoskins
			Q&A
14:30 - 14:40	10 Minute Break		
14:40 - 15:10	Product Review	P1	Digital Science: 20min vendor presentation
		P2	AAAS: 10min vendor presentation
15:10 - 15:20	10 Minute Break		
15:20 - 17:00	Session 2: Understanding the impact (Session Chair - Lucille Webster)	2.1	Distraction or engagement? Social media, libraries, and digital reading behaviour - Tyler Shores
		2.2	Renewed mission for engagement to enhance discovery of information resources: a case of UP library - Lindiwe Soyizwapi
		2.3	Adapting librarians' skills and workflows to survive in a 'new normal' world - Samantha Bennett
		2.4	What e-resource librarians wish client services librarians knew - Wynand van der Walt and Brenda Stoltz
			Q&A

Time	Session	No	Details
		2.5	Reflections on relevance, over to you - a Library Directors' panel discussion - Connie Bitso, Mathew Moyo and Shirlene Neerputh
			Q&A

Day Two

Time	Session	No	Details
Wednesday 4 August			
11:50 -12:40	Exhibition		Delegates login and explore virtual venue and move to exhibition hall
		E	Exhibition time
12:40 - 12:50	10 Minute Break		Allow attendees to move from exhibition hall to plenary room
12:50 - 14:30	Session 3: Informing, measuring and demonstrating value (Session Chair - Paiki Muswazi)	3.1	COUNTER 5 – how to make it work for libraries and consortia - Lorraine Estelle
		3.2	The use metrics to show the value of electronic resources and for decision making in South African academic libraries -Elisha Chiware
		3.3	What the ESAC Market Watch and Registry has to offer libraries - Ádám Dér and Colleen Campbell
			Q&A
		3.4	The usage pattens of the library's e-resources in the year 2020 at the University of Zululand - Phumlani Biyela
		3.5	Global trends in open access, and - Adriana Filip Data analysis as a key step in preparing South Africa for transformational agreements - Nora Buchanan and Glenn Truran
			Q&A
14:30 - 14:40	10 Minute Break		
14:40 - 14:50	Product Review	P3	Oxford University Press: 10min vendor presentation
14:50 - 15:10		P4	American Psychological Association: 20min vendor presentation
15:10 - 15:20	10 Minute Break		
15:20 - 17:00	Session 4: Building trusted relationships (Session Chair - Madelein Van Heerden)	4.1	Intembeko, building trusted relationships with ORCID - Wesley Barry
		4.2	Strategic partnerships and collaborations in the advent of COVID-19 - Musa Baloyi-Sekese
			Q&A
		4.3	Transformational agreements - setting the South African framework - Glenn Truran and Nora Buchanan
		4.4	Communicating with institutional stakeholders about transitional open access agreements – the UK experience - Helen Dobson
			Q&A
		4.5	The value and process of establishing and nurturing partnerships between librarians and researchers to advance open access - a fishbowl conversation - Ellen Finnie, Maria Frahm-Arp and Cossie Ndumela.

Day Three

Time	Session	No	Details
			Thursday 5 August
11:50 - 12:50	Exhibition		Delegates login and explore virtual venue and move to exhibition hall
		E	Exhibition time
	1 Minute Break		Allow attendees to move from exhibition hall to plenary room
12:50 - 14:00	Session 5: Open scholarship and the library (Session Chair - Zanele Mathe)	5.1	SPA-OPS follow-up Project - Lorraine Estelle
		5.2	Using the MIT Framework in Library/Publisher Negotiations: Our Experience so Far - Laura Hanscom
		5.3	Denmark's first transformative agreement secured with Elsevier 2021-2024 - Pernille Hammelsø
		5.4	The role of libraries to achieve structural openness and epistemic justice - Arianna Becerril García
			Q&A
14:00 – 14:10	10 Minute Break		
14:10 – 15:00	Product Review	P5	Springer Nature: 20min vendor presentation
		P6	WWIS: 10 minutes sponsor slot/10min vendor presentation
		P7	ProQuest: 20min vendor presentation
15:00 - 15:10	10 Minute Break		
15:10 - 16:30	Session 6: Tools, skills & competencies for e-resource librarians (Session Chair - Lindsay Reid)	6.1	ReadMetrics, a comprehensive free and open source usage statistics toolkit - Thomas Porquet
		6.2	ReadMetrics: deep dive into article-level usage statistics with the National Library of Luxembourg -Patrick Peiffer
			Q&A
		6.3	Citation pollution - Kirstin Krauss
		6.4	From silos to intersection: considering the open continuum - Tamir Borensztajn
			Q&A
16:30 - 17:00	Closing Session	C1	Inspirational storytelling - Gcina Mhlophe
		C2	Closing remarks - Laila Vahed

Title, abstract and presenter

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1.1	**Opening / Welcome** **Ms Laila Vahed** is the Director of Library and Information Services at the University of Zululand, a position she has held since 2003. She holds a Master's degree in Information Studies from the University of Natal. Laila has held portfolios in various national library structures over the years, including the Library and Information Association of South Africa (LIASA) and the National Council for Library and Information Services. She also co-chaired the International Federation of Library Associations and Institutions World Library and Information Congress National Committee for the 2007 congress. In 2016 Laila was named LIASA Librarian of the Year for her services to librarianship in South Africa. Laila is the Chairperson of the SANLiC Board of Directors.
1.2	**Sustainability in the higher education sector** Higher education South Africa faces an existential threat in this age of multi ongoing disruptions. Financial sustainability stares universities in the face. It does not have to be so. Opportunities beckon if universities re-imagine themselves as drivers of impactful and transformative change. Multiple changes in the way universities do things are a must from what they teach, and how they teach to what they research and how they do research and how they manage financial and other resources. **Professor Tawana Kupe** is the Vice-Chancellor and Principal of the University of Pretoria. He holds a BA Honours and a Master's degree in English from the University of Zimbabwe, and a DPhil in Media Studies from the University of Oslo, Norway. Prof Kupe is the Africa Co-Chair of the Australia Africa Universities Network (AAUN) since 2019 and an Honorary Doctorate in Humanities was bestowed on him by Michigan State University in December 2019. Professor Kupe has a notable publication record, having authored journal articles, books and book chapters in his main discipline, Media Studies and Journalism. He is the Managing Editor of the *African Journal for Communication and Information*. He has played a key role in the establishment of select new innovative initiatives at Wits, of which the latest, in 2018, is the Africa Centre for the Study of the United States. He is an active member of several Civil Society Organisations, including the AmaBhungane Centre for Investigative Journalism and is Chairman of the Board of Media Monitoring Africa since 2005. He has been a judge and convenor of multiple major journalism awards in South Africa and is a member of the Council of the International Association of Media and Communication Research (IAMCR). He has recently been appointed as a Council Member and Trustee of the Association of Commonwealth Universities (ACU) Council in the United Kingdom, as well as a member of the National Advisory Council on Innovation (NACI) in South Africa. He is also a member of the Advisory Committee of the South African Sustainable Development Goals (SDG) Policy Support Initiative, a tripartite partnership between the Government of South Africa, led by the Presidency, the German Government (assisted by Gesellschaft für Internationale Zusammenarbeit) and the South African SDG Hub hosted at the University of Pretoria. Professor Kupe is a popular invited speaker, academic expert and regular commentator on issues of media performance on radio, television and the print media in South Africa for local and international media.
1.3	**The Post Pandemic Boom** • What mega shifts can we expect in the future? How to leverage the post pandemic boom. • Ambidexterity is key to the future. How to build it. • Navigating disruption. • How will the next 10 years be impacted by the events of today? • How will your organisation be affected by political, economic, social, societal, technological and other changes? • A granular view on the future of sectors, industries and business models. Insights from this talk are based on Abdullah's best-selling book. • How can companies reposition their strategy now, with an eye on the next decade?

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	• What will the future of work look like? • What does agility and adaptability look like in a post COVID world? • How can individuals and leaders ensure they have the right tools to adapt and thrive in this new context? **Abdullah Verachia** is a sought-after global speaker, advisor, practice strategist and innovator. He is adept at fusing practice, education, insight, empathy and experience together to add significant value at all levels. Abdullah has served in senior executive and board roles, crafted competitive strategies for leading companies and governments around the world, lectured at some of the top-ranked business schools globally and built and run a number of successful companies.
1.4	**Two years, two disasters** The unanticipated outbreak of the COVID-19 pandemic in 2020 tragically impacted the entire world. In trying to survive this disease, the world literally came to a halt and a new dispensation of operating began. Social distancing became mandatory and ushered in the switch from physical to virtual operations. The University of Cape Town was one of the academic institutions that shifted to a virtual service model, offering online services and support moving beyond the physical barriers of walls. The shift to virtual resulted in a greater demand for access to online material. With this demand we saw our publishers and providers rise to the occasion with unbelievable assistance. In April 2021, UCT was rocked by a second disaster: the Jagger Library fire that ripped at the heart strings of many, far and wide, and decimated the African Studies collections of books and film. This presentation focusses on the work done in the Acquisitions Department in response to two disasters and the fantastic responsive and supportive role that our publishers and providers played through generous remote access to databases, journals, and electronic books. **Jillian Clark** is the Subscriptions Librarian at the University of Cape Town Libraries. Her role at the UCT Libraries is to manage print and electronic resource subscriptions, along with all the usual tasks undertaken by an electronic resources librarian. She started in the Acquisitions department in May 2018 and progressed to the role of Subscriptions Librarian in January 2019. Her library career started out in the University of Natal, and she has over 22 years of experience in various roles in the library sector. She holds a BSocSci Hons and a PGDIP RAM from University of KwaZulu-Natal. **Caroline Dean** is Principal Librarian in the Acquisitions Department at the University of Cape Town (UCT) Libraries, a position she has held since July 2013. Prior roles include Electronic Resources Librarian (June 2000 to September 2013) and manager of the Commerce Information Services Section (August 2007 to July 2011). Her library career started out in the UCT Health Sciences Library where she occupied various roles between December 1991 and mid-2000. She holds a BSc from Stellenbosch University and a MBibl from UCT.
1.5	**The influence of COVID-19 in meeting academic library users' online information needs: the case of a South African university library** Electronic library resources are vital in meeting the information needs of academic library users. The impact of COVID-19 has forced many academic libraries in South Africa to offer a remote online service to their users. In doing so, many academic libraries have had to embrace the concept of the digital library and the adoption of Library 2.0 tools to support the information needs of their users. The challenges of providing a remote online service and the accessibility of electronic resources for users are highlighted in the case study. Strategies to improve service delivery and access to electronic resources are discussed in light of the need to satisfy the information needs of academic library users. **Prof Ruth Hoskins** is the Dean of Teaching and Learning in the College of Humanities at the University of KwaZulu-Natal. She is a Professor of Information Studies and has supervised many masters and doctoral studies. Her research areas of interest include the academic library, open access and institutional repositories.
2.1	**Distraction or engagement? Social media, libraries, and digital reading behavior** The worldwide pandemic has had many consequences for libraries, including the need to rely more and more upon digital platforms to serve and engage with their readers. In this talk, I will discuss some of the challenges and opportunities that this shift to digital access and digital might mean – especially the ways in which social media may or may not help to promote reader engagement.

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	Tyler Shores is the Manager of the ThinkLab Program, within the [Strategic Partnership Office at the University of Cambridge](#). His research focuses upon reading in print, reading on screens, and digital distraction and attention spans. Tyler's current projects are focused on digital wellbeing, social media, and the role of digital technology in our everyday lives. Prior to Cambridge, Tyler worked at Google in Mountain View, CA as part of Authors@Google, one of the world's largest online lecture series. In addition, he has worked as a director of digital textbooks in the field of nonprofit education, and most recently worked as a manager in online education at Stanford University.
2.2	**Renewed mission for engagement to enhance discovery of information resources: a case of UP library** When higher education institutions (HEIs) in South Africa were compelled to transition to "emergency" online learning, academic libraries had to align themselves to supporting the academic programme virtually. The University of Pretoria (UP) Library was no exception; with the pandemic having altered our environment it became essential that the library align its services and operations to the expressed needs of the university community. The library was unsure whether it had fully grasped the needs of the university community, as well as the changing and new needs. Challenges could also arise from the varied environments in which everyone was working. In a campus environment this could be an equaliser. The presentation will outline the two surveys conducted during 2020 targeting different audiences of the university community. With these surveys the library was able to receive valuable input and suggestions from undergraduates. The usability study undertaken by the user experience team to allow for in-depth evaluation of discovery of electronic resources will also be discussed. The voices which will also be represented in the presentation will be the engagement of the senior management team of the library with the senior management of the University as well as with the student leaders. The successes in responding to the needs will be discussed, the strengths of investing in a digital library over the years will be shared. Finally short-term and medium-term interventions will be discussed and areas for further improvements will also be acknowledged. **Lindiwe Soyizwapi** currently serves as Director of the Department of Library Services at the University of Pretoria, a position she has held since January 2020. Lindiwe is passionate about libraries and those opportunities which allow libraries to re-imagine their role in higher education. She previously worked at the University of KwaZulu-Natal library and has over 20 years of contributing to the academic project.
2.3	**Adapting librarians' skills and workflows to survive in a 'new normal' world** Abstract: Librarian skills and library workflows have been challenged during the rise of the COVID-19 pandemic. Working from home and staying relevant to patrons and library users has become a hot topic in the library and information arena. Many of us thought that the pandemic would soon be a thing of the past - but we are coming to realise that many of the changes we have seen could be here to stay; we as librarians are adapting to a "new normal". If you are still paving your way through change and trying to figure out where to best situate your library strategically, this session can assist in guiding your evolution, in adjusting and refocusing your support to patrons, budgeting from p to e, and evaluating resources in the post COVID world. **Samantha Bennett** holds a Bachelor in Information Science from University of South Africa, a Master's in Information Science from University of Pretoria and is currently a PhD candidate. Prior to joining ProQuest as a Training & Consulting Partner Samantha was Library Technical Services Senior Specialist at the Higher College of Technology in Abu Dhabi and prior to that she worked at Legado Learning Consulting as a Library Management Facilitator. She also has prior experience as an electronic resources librarian at Stellenbosch University in South Africa and as Library Manager at the National Research Foundation working at the South African Astronomical Observatory library. Samantha has more than 18 years' experience as a librarian particularly in eResources its workflows and processes.
2.4	**What e-resource librarians wish client services librarians knew** Numerous conversations with colleagues allude to a potential disconnect between electronic resource management processes, and how these impact on the ability of client services to effectively manage collections as well as to respond to user needs. This paper examines some of the key issues that, if addressed, would further empower client services staff in rendering effective service and front-line support.

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	These areas include: • Language of the environment • Vendor business models • Technical requirements • Licensing & Access management The paper proposes continual professional development opportunities to grow knowledge and understanding of electronic resources management, as a key strategy towards collective responses to user needs. **Brenda Stoltz** obtained a Bachelor of Arts Degree and Higher Diploma in Education from Rhodes University in 1992. She started her career in libraries at the Cape Provincial Library Services and thereafter, moved to Rhodes University Library in 1995. While working at Rhodes, she obtained a Bachelor of Information Science Degree Cum Laude (UNISA) and Honours Summa Cum Laude (UKZN). Brenda has worked in various positions at the Rhodes University Library, including Circulation and Periodicals and for the last ten years, she has been working as the ERM Librarian. **Wynand van der Walt** is Head Librarian: Technical Services at Rhodes University Library. He holds a Masters in IT from the University of Pretoria and is currently enrolled for a PhD at KU Leuven. His areas of interest are leadership for innovation; digitisation and digital curation, scholarly communication, and the semantic web and how it affects library-related technologies.
2.5	**Reflections on relevance, over to you - a Library Directors' panel discussion** Day one of the conference focuses on exploring digital disruption and understanding its impact. In this final slot on day one, three library directors will engage in a panel discussion in which they reflect on the day's deliberations from their perspective as academic library directors and respond to the implications for their libraries. The panelists are: • Dr Connie Bitso is the Director of the University of Fort Hare Libraries. • Dr Mathew Moyo is Chief Director: Library and Information Service at North-West University. • Dr Shirlene Neerputh is the Director of Library Services at the University of the Western Cape. Dr **Connie Bitso** is the Director of the University of Fort Hare Libraries. Previously she held a senior lectureship at the University of Cape Town (UCT). She graduated with a PhD in Information Science from the University of Pretoria and holds a Master's degree in Library and Information Science from UCT. Connie has a wealth of research, teaching and learning experience in the library and information science discipline and is the past chair (2016-2018) of LIASA'S Research and Training Interest Group. She has also served as the Trustee of The Bookery in 2016-2020 and is currently Deputy Chair of South East Academic Library Systems' (SEALS) Trustees. She has published book chapters and articles in reputable journals and is also a regular speaker at national and international conferences. Dr **Mathew Moyo** is currently Chief Director: Library and Information Service at North-West University, South Africa. His experience in the LIS field spans more than 25 years. Dr Moyo has also lectured in the Information Science field for more than five years. He holds a Doctoral Degree in Library and Information Science. He has read papers at national and international conferences, as well as serving as a reviewer for various journals and as an examiner for several universities. Mathew's research interests are in the areas of information literacy, open science, user behaviour, and governance/management, among others. He is also passionate about mentorship and capacity building. Dr **Shirlene Neerputh** is the Director of Library Services at the University of the Western Cape. Her professional experience in higher education libraries spans 30 years. An active member of several professional bodies, she currently chairs the Committee of Higher Education Libraries South Africa, has participated in the European Erasmus Mundus Staff Mobility Scholarship, and completed the Nuffic Doctoral Supervision and

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	University Leadership programmes. Shirlene's vision is to lead and enrich the university library through embedded librarianship principles that are responsive to the disruption and transformation of our time.
3.1	**COUNTER 5 – how to make it work for libraries and consortia** Release 5 of the COUNTER Code of Practice provides new opportunities for libraries and library consortia to make data informed decisions. This presentation will discuss how this Release creates a level playing field, enabling libraries to compare usage and calculate cost per use accurately across platforms. COUNTER reports also provide library consortia with great insights, enabling them to find benchmarks which will inform their negotiations with publishers and vendors. It will also discuss the free tools that are now available, to enable libraries and consortia to automate the harvesting of usage reports more easily, so time can be better spent on analysing statistics rather than manually downloading reports. **Lorraine Estelle** is the COUNTER Project Director. Launched in March 2002, COUNTER is an international initiative serving librarians, publishers and intermediaries by setting standards that facilitate the recording and reporting of online usage statistics in a consistent, credible and compatible way. Lorraine is experienced in the information industry with a background in libraries, consortia, shared services, vendors and publishers. She has managed and conducted a wide range of projects, with a particular interest in new business models for electronic information resources and directed the development of several national shared services including Jisc Collections and the Journals Usage Statistics Portal. Lorraine is also a Director at Information Power Limited, providing consultancy services to funder, publishers, and libraries.
3.2	**The use metrics to show the value of electronic resources and for decision making in South African academic libraries** In most academic libraries in South Africa, the bulk of information resources budgets are reserved for the purchase of electronic resources that include databases, e-journals, e-books and other electronic media. To justify the huge expenditure on electronic resources libraries are continuously required to show their value to the university communities – especially students' success, research outputs and to some extent administrative work. Library directors and their teams rely heavily on usage statistics to demonstrate value as well as in decision making as to which resources to purchase and continue supporting. This presentation outlines the approaches through the use of metrics to demonstrate value as well their application in decision making. The presentation also outlines the forms in which the various user statistics and data are presented to add meaning in the presentations by librarians to the user community and university management. Dr **Elisha Chiware** is the Director of the Cape Peninsula University of Technology Libraries. Elisha has also served as the Secretary of IATUL (International Association of University Libraries Board) and has worked in libraries and library and information science schools in Namibia, Botswana and Zimbabwe. He has published over 30 articles, two books and presented at several conferences. He has also worked as an international information management consultant, establishing trade information centres in the East, South and Central African region.
3.3	**What the ESAC Market Watch and Registry has to offer libraries** As scholarly publishing moves from a subscription-based system to one based on open access, librarians who have traditionally been responsible for collections and acquisition decision-making and publisher negotiations are having to add new strategic perspectives to their skill set. More and more institutions around the world are negotiating central open access publishing agreements with fully open access publishers to secure better conditions and service for their authors. Similarly, transformative agreements are proliferating, driving rapid evolution in licensing practices; there are currently hundreds of such agreements negotiated by libraries and consortia in more than 30 countries and with over 40 different publishers. But as the landscape evolves, how are librarians to keep up with all of the changes and position themselves for success as they face publishers with new expectations? In this context the ESAC Initiative has grown into an open and global community of practice of librarians who are sharing their experiences and expertise in the operational aspects of open access agreements. The ESAC community also develops community resources and guidelines to empower librarians as they move into the era of open access, including the ESAC Workflow Recommendations, ESAC Transformative Agreement Registry and ESAC Market Watch.

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	Colleen Campbell leads external engagement in the OA transition at the Max Planck Digital Library (MPDL), focusing on capacity-building activities to empower librarians and other stakeholders with strategic insights and essential skills as they work to enable an open, sustainable and equitable scholarly publishing environment. She coordinates the Open Access 2020 Initiative, an international effort that aims to transition today's scholarly journals to open access publishing models, and the ESAC Initiative, a global community of practice of libraries and consortia promoting efficiencies and standards around the negotiation and implementation of transformative and open access publishing agreements. **Ádám Dér** is a member of the licence management team of the Max Planck Digital Library, where his main responsibilities are in publisher negotiations to advance the open access transition in scholarly publishing. In this role he is involved in a broad range of strategic activities, including data analyses and financial modelling. He is an expert advisor on data analytics and workflows in the ESAC Initiative, a global community of practice of libraries and consortia promoting efficiencies and standards around the negotiation and implementation of transformative and open access publishing agreements and contributes to a variety of community and industry efforts such as the OA Switchboard. Prior to his role at MPDL, he served as Head of Development of the Hungarian EISZ Consortium.
3.4	**The usage pattens of the library's e-resources in the year 2020 at the University of Zululand** The mission of the University of Zululand (UNIZULU) Library is to efficiently support the teaching, learning and research functions of the University in a cost-effective and reliable manner. We do this by promoting access to information and collecting and maintaining a relevant and balanced stock of information resources in an orderly and user-friendly environment. In 2020 this mission was put to the test due to the global changes that were brought by the outbreak of the COVID-19 pandemic. UNIZULU library services, like any other academic library, had to be a step ahead in facilitating seamless access and providing relevant information, to users in the best possible format. The sudden change in the teaching and learning environment forced a massive shift from face-to-face contact to online learning. Every library employee had to be brought up to speed with the transition from physical library services to a virtual service. Different e-services skills had to be brushed up, e-tools had to be put fully to use and people had to make themselves available 24/7 for the library mission to be sustained. This paper will present a statistical overview of different sections in the E-Resources Department, which had to play a leading role in facilitating access to relevant information and to ensuring that the university's teaching and learning functions were fully supported. **Phumlani Biyela** joined the University of Zululand in 2014 as a Senior Library Assistant after working as an Audio-Visual Archivist at ENCA and as an Assistant Librarian in another private educational institution. He has a National Diploma in LIS (DUT), a Postgraduate Diploma and Honours Bachelor: Info Science (UNISA) and is pursuing a Master's Degree in Information Science (UNIZULU).
3.5a	**Global trends in open access** Open science initiatives help science to be more efficient, improve research outcomes, and establish public confidence in science through improved transparency. This presentation will examine the global trends in open access (OA) emerging with the impact of OA policies and analyze South Africa's OA footprint. As a publisher neutral data provider, Web of Science can provide the most complete and trustworthy overview of Open Access publication status and impact so that institutions can align researcher incentives to meet OA publication goals and monitor compliance with OA initiatives. The presentation will take a data-driven approach to understanding South Africa's OA output, contextualize it with comparison to other countries and look at opportunities to accelerate the transition to open access. **Adriana Filip** is a Solutions Consultant for Clarivate. Her main role is to provide support for research analytical and discovery tools such as Web of Science, InCites or Journal Citation Reports, also share an understanding, and promote bibliometrics. She works with researchers, academics and librarians at all levels and cooperates with governmental and corporate institutions offering consultancy services.
3.5b	**Data analysis as a key step in preparing South Africa for transformational agreements** In March 2017, SANLiC signed the OA2020 Expression of Interest to be part of an international initiative to transform all journals from a subscription model to open access within the framework of current available resources. The premise was that there was more than enough money in the existing system to realize a

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	smooth, swift, and scholarly oriented transition to full Open Access (OA). However, it was acknowledged that some research-intensive consumers of scholarly journals may be required to pay more in a full OA scenario than in the subscription-based status quo. SANLiC members could not afford to blindly rush wholesale into transformative agreements without a clear appraisal of the consequences. In 2020, with the help of Clarivate Analytics, SANLiC sourced South African research output data for 2014-2019 and analysed the research output trends in relation to research visibility (OA) as well as the associated costs for both reading and publishing. The result was tangible evidence to support strategy choices to further the South African National System of Innovation open science research agenda. The findings have helped to inform SANLiC's framework for transformational agreements with publishers for 2022 and beyond that will incorporate both reading and publishing services. This presentation will highlight some of the findings and how they were determined. Since 2014 **Nora Buchanan** has been working from home in Durban as the SANLiC Licensing Manager. A graduate of the University of KwaZulu-Natal, Nora completed a PhD in Information studies in 2009. She has worked at Johannesburg Public Library, in the library at the Anglo American Corporation of South Africa, and for 32 years in various positions in the library of the University of KwaZulu-Natal, retiring from the position of director of Library Services in 2014. **Glenn Truran** has been the director of SANLiC since 2014 and works from home in Cape Town. After graduating from the University of the Witwatersrand with a BA and HDipEd (PG), he worked briefly as an educator in South Africa and England. Subsequently he completed a diploma in public policy and development administration at the University of the Witwatersrand and in 2003 received his MBA from the University of Cape Town. Before joining SANLiC Glenn worked in several educational and poverty alleviation non-profit organizations in Gauteng and Cape Town.
4.1	**Intembeko, building trusted relationships with ORCID** ORCID is a critical part of the research infrastructure and is key to consistent attribution and recognition. While ORCID has long provided a mechanism for member institutions to integrate their in-house systems with the ORCID Registry and authoritatively assert researchers' affiliations and publications, this has proved challenging for many South African institutions. This presentation will briefly look at the intersection between ORCID and common library systems such as DSpace, before introducing a new tool in South Africa — the Intembeko ORCID Hub — that is specifically designed to lower the ORCID integration burden for institutions. **Wesley Barry** is the ORCID technical specialist at TENET. Wesley started his career building and supporting library systems at the University of Cape Town before moving into more general IT. At TENET he re-embraced his library roots, and enthusiastically supports South African ORCID Consortium members. When he's not knee deep in persistent identifiers, he finds himself involved in other aspects of TENET's trust & identity service suite.
4.2	**Strategic partnerships and collaborations in the advent of COVID-19** This presentation argues that the advent of the Coronavirus pandemic has necessitated the need for libraries to re-evaluate effective communication channels and visibility strategies to bring about change and to sustain key strategic partnerships. The resurgence of COVID-19 has necessitated that libraries offer limited walk-in services and rely more heavily on remote services. However, COVID-19 has also presented opportunities for robust interactions with relevant stakeholders in order to achieve mutual goals and to effectively expand stakeholders' reach to users who may not necessarily walk inside a library building. Considering the National Library of South Africa's (NLSA's) functional mandate of providing equitable access to information, it has therefore become imperative to develop and implement effective stakeholder management strategies to ensure direct stakeholder interactions in order to inspire actions. According to the department responsible for effective government communication, Government Communication and Information Systems (GCIS), government entities need to consider the diverse interests of the broader South African society which are the Rooted Realists, City Seekers, Safely Surbans, Metro Mobiles and Cosmopolitan Capitals. This paper outlines

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	the NLSA's experiences and lessons learnt with regards to effective management; engaging the right stakeholders in the right way at the right time with the appropriate frequency to achieve the desired outcome while navigating the impact of COVID-19. **Musa Baloyi-Sekese** is a Content Development Manager at the National Library of South Africa. Her research specialty and interests include political economy, decoloniality, gender and inequality. Musa holds an Honours Degree in Development Studies and was recently published in the journal *Alexandria*.
4.3	**Transformational agreements - setting the South African framework** At a Special General Meeting held on 23 June 2021 SANLiC members adopted 16 principles with the intention of replacing existing journal reading subscription agreements, which no longer serve the interests of our researchers and the South African National System of Innovation, with agreements that incorporate reading and publishing services. In so doing, we expect to grow our members' research agenda and the dissemination thereof by negotiating agreements that incorporate the principles listed below. In this presentation the SANLiC team will review the 16 principles and explain why these 16 were identified as essential for South Africa's research agenda. It will provide insight into the implications these principles hold for various stakeholders involved in accessing, consuming and publishing scholarly information. See 3.5b for details on **Nora Buchanan** and **Glenn Truran**
4.4	**Communicating with institutional stakeholders about transitional open access agreements – the UK experience** Jisc recommended the adoption of transitional open access agreements (TAs) to UK Higher Education institutions (UKHEIs) in 2017 as a mechanism to control escalating costs associated with the combined cost of subscriptions and open access (OA) publishing and to stimulate rapid growth in the proportion of UK research published OA. Following the announcement of Plan S this focus on TAs has intensified. Universities and affected researchers concerned about the implications of the new requirements immediately began analysis to underpin important advocacy work. Participating in TAs has required UK libraries to make strong cases for support from senior institutional leaders and challenged how teams – either within libraries or across different parts of an institution – work together and communicate with researchers about open access publishing and Plan S compliance. Since 2017 Jisc has supported UKHEIs in the transition to open access by negotiating 30 TAs from a range of publishers that they can opt into as well as creating advocacy materials. This presentation will provide a detailed overview of the guidance materials Jisc prepared to facilitate internal stakeholder communication and summarise key points from a related OA community event organised to enable the sharing of good practice. **Helen Dobson** is the Licensing portfolio specialist for research content at Jisc. She leads a team working to deliver agreements that meet the requirements of UK universities, achieve savings and support research funder open access policy objectives. Helen's background is in academic libraries and in previous roles she oversaw services providing Open Access and Research Data Management support and publishing advice.
4.5	**The value and process of establishing and nurturing partnerships between librarians and researchers to advance open access - a fishbowl conversation** This interactive, dialogue-based session will be jump-started by a conversation among a researcher, a librarian, and a leader at a North American consortium about the value and process of establishing and nurturing partnerships between librarians and researchers to advance open access. The session will engage the audience in a "fishbowl" (observed) conversation with: • Maria Frahm-Arp, Executive Director of the Library and Information Centre at the University of Johannesburg and a well-established researcher • Cossie Ndumela, a librarian at the University of Johannesburg • Ellen Finnie, Director of Shared Collections at the University of California/California Digital Library

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	This experienced triad will launch the session through an initial informal conversation reflecting upon their perspectives on building relationships between librarians and researchers to advance open access. Their thoughts will seed an open dialogue with all session participants.

In her role as Director of Shared Collections at the California Digital Library, **Ellen Finnie** oversees systemwide licensing, open access publisher agreements, and shared print initiatives and is responsible for both the systemwide negotiation, licensing, and management of shared digital materials for the UC Libraries, and for the university's efforts to transition its systemwide online journal licenses to open access.   Prior to taking on this role in July, Ellen was the Open Access Publisher Agreements manager at CDL. Before joining CDL in 2020, Ellen held several roles in the MIT Libraries related to advancing open access in the scholarly communications system, including implementing open access policies and transformative agreements, and engaging broadly with the MIT community of faculty, researchers, and students, about open access.

Prof **Maria Frahm-Arp** obtained her PhD in the Sociology of Religion from Warwick University (UK) at the end of 2006. She in an NRF rated scholar and the author of over twenty book chapters and journal articles on Pentecostal Charismatic Churches in South Africa. In 2010 she published 'Professional Women in Pentecostal Charismatic Churches in South Africa' and in 2015 the book 'Into the Deep: Finding God in the Midst of Suffering'. She is the winner of the UJ Humanities Teaching and Learning Award (2014) and the Vice Chancellors Distinguished Teaching and Learning Award (2016). In 2017 she worked as the Vice Dean in the Faculty of Humanities and in 2018 she became the Executive Director of the Library and Information Centre at UJ.

Constance (Cossie) Ndumela supports Research, Teaching and Learning at the University of Johannesburg. She joined UJ Libraries as a Learning Commons Librarian in 2013. In 2015 she was appointed the Faculty of Engineering & Built Environment as an Information Librarian. Cossie has experience in Digital marketing for the Library and is involved in Library Community Engagement. She led an Online Learning Task Team in 2019 and coaches of other Task Team leaders. |
| 5.1 | **SPA-OPS follow-up Project**
Information Power recently completed a report which measured progress during 2020 and 2021 on Open Access agreements between consortia/libraries and publishers. OA agreements are now used around the world in low-, middle-, and high-income countries. During 2020 there was an increase in the number of OA articles published in hybrid journals, which reverses a downward trend in the proportion of total articles published as OA in hybrid journals between 2016 and 2019. There is potential for further growth.

Smaller independent publishers – for example society publishers without a larger publishing partner, university presses, library presses, and small independent commercial presses – face some special challenges due to their scale. This presentation will discuss how library consortia can work more closely with this group of publishers to transition to open access.

The presentation will also discuss the reports recommendation that funders take steps to enable universities to aggregate all their expenditure with publishers via the library. They also encourage publishers who closely link the price of OA agreements to article volume to think carefully about more equitable models.

See 3.1. for details on Lorraine Estelle. |
| 5.2 | **Using the MIT Framework in library/publisher negotiations: our experience so far**
The MIT Framework for Publisher Contracts was released in October 2019. Written by the MIT Ad Hoc Task Force on Open Access to MIT's Research, MIT Faculty Committee on the Library System, and MIT Libraries, it has since been endorsed by nearly 200 organizations. In it we state that scholarship benefits society the most when "it is freely and immediately available to the entire world to access, read, and use; without restriction and for any lawful purpose." While open access has gained significant momentum, we are still far from the situation where scholarly communications is serving the needs of society as effectively as it should. |

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	With this in mind, the Framework provides clear areas for the libraries to focus on to improve the situation, specifically in the contracts we sign with publishers – one of our main points of influence in the system. This presentation will describe the Negotiations Team's experience of using the Framework as a tool in conversations with publishers, things that have worked well, and lessons we have learned, particularly with regards to transformative agreements. **Laura Hanscom** was named the department head for Scholarly Communications and Collections Strategy in the MIT Libraries in April 2021 and is the leader of their Negotiations Team. Prior to that, she was their Scholarly Communications and Licensing Librarian from 2016. She started her library career in interlibrary loan at the London School of Economics and was Digital Repository Administrator at City University London Library. Prior to coming to MIT, she served as Scholarly Communications Librarian at Salisbury University in Maryland, USA.
5.3	**Denmark's first transformative agreement secured with Elsevier 2021-2024** We initiated the negotiations with Elsevier in October of 2020 with two hard mandates from the governing body of Universities Denmark: - no further price increases on journals, and - immediate open access (OA) to research output from researchers from the subscribing institutions. On the first mandate: Due to budget cuts the institutions couldn't accept any further increases on prices for the journals. The second mandate was to emphasize the National Open Access strategy which is a green OA strategy with a maximum of 12 months embargo. We achieved no price increase on the journals for the duration of the contract (2021-2024). And we managed to negotiate a deal where all papers published in all hybrid journals in the Freedom collection and in a few (subscription) journals outside of the Freedom Collection will be published immediately OA with no APC paid. And there is no restriction on the number of papers published annually. **Pernille Hammelsø** is currently special adviser at the Royal Danish Library, National License Consortium, where she negotiates national deals for all Danish universities and a number of other higher education institutions in Denmark. Prior to joining the National License Consortium, Pernille held senior positions with a number of STM publishers such as the Institute of Physics Publishing in Bristol (UK) as well as John Wiley & Sons (Japan and Denmark).
5.4	**The role of libraries to achieve structural openness and epistemic justice** The prevailing science communication system has showed little success in making science a global, participatory and equitable conversation. At the same time, a very robust ecosystem of science communication has been built in the Latin-American region, one that is intrinsically open, non-commercial and academy-owned. However, this "regional" approach has remained outside the legitimated channels of scholarly communication. AmeliCA's and Redalyc's approach is based on the fact that scholarly communication in control of the academy is a more healthy and sustainable strategy for the development of science and society. Why is it that commercial publishers are a pivotal actor in science communication –in many parts of the world– if the biggest part of activities concerning the generation of knowledge is in the academy? Now, strategies are emerging that seek to achieve open access such as transformative agreements. However, it is important to question: What is the future we envision for the dissemination of science? In whose hands should it be? What is the role of libraries in this context? We are facing a great opportunity to rebuild a system in favour of the development of science and humanity. So, it is strategic for the research community, universities, libraries, and funders to join forces, as well as share and connect individual and institutional efforts to build a cooperative infrastructure that guarantees that publishing is led by the scholarly community and that its openness can be sustainable. All leveraged with technology to find more effective methods of communication and deployment of the knowledge generated by different regions, disciplinary fields or languages.

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	Arianna Becerril García is a full-time professor-researcher at the Autonomous University of the State of Mexico (UAEM) and a member of the National System of Researchers (SNI) of Mexico. She holds a PhD and MSc in Computer Science, Tecnológico de Monterrey, Mexico and a BA in Computer Engineering, UAEM. She is part of the founding team of the Network of Scientific Journals from Latin America and the Caribbean, Spain and Portugal (Redalyc.org) where she is the current Executive Director. Dr Becerril is founder and president of AmeliCA Conocimiento Abierto S.C. Arianna is co-founder of the Mexican Network of Institutional Repositories and a member of the steering committee of InvestInOpenInfrastructure. She is a board member at SCOSS and also on the council of the Directory of Open Access Journals (DOAJ).
6.1	**ReadMetrics, a comprehensive free and open source usage statistics toolkit** ReadMetrics is aiming to be both a complete COUNTER 5 toolkit, as well as a mature tool to extract super fine statistics (individual articles) based on Proxy log files. Both use cases include data management and visualisation based on the Elastic Stack with Kibana dashboards. ReadMetrics is designed for a consortial setting (as already used in France by Couperin.org consortium members and the Luxemburg consortium), but it also works for individual libraries and can be easily deployed in a virtualized container (docker). More on readmetrics.org **Thomas Porquet** works as a project manager for the Services & Prospective department of the Couperin.org french consortium since 2011. He is involved in usage statistics gathering and processing through various software projects: • **Mesure** (now discontinued) based on the JUSP portal, where COUNTER reports from publishers were harvested and put online for Couperin's member institutions and the CC-Plus ICOLC pilot. • **ezPAARSE** to let institutions generate usage statistics based on their logs. • **ezMESURE** where ezPAARSE data is gathered and Couperin members are provided with an advanced dashboard tool built upon Elastic and Kibana.
6.2	**ReadMetrics: deep dive into article-level usage statistics with the National Library of Luxembourg** The analysis of server logs, using, has been undertaken since 2018, using open source components to be bundled in 2021 under the name "ReadMetrics". The National Library of Luxembourg has undertaken the exact analysis proposed above, but based on server logs from its local proxy server, not from publishers. The two main findings are: • after deducting multiple downloads by the same user (24 hr session), about 60% of the original usage is left • after additionally deducting all articles which are published Open Access or for which alternative Open Access versions (such as pre-prints) exist, about 40% of the original usage is left. The COUNTER project's code of conduct is the current standard by which publishers create and make available usage statistics to libraries. Importantly, COUNTER statistics are limited to the number of article downloads per journal title, and generally do not identify the actual articles. The article based analysis of usage from the "ReadMetrics" tool from server log files shows that this number is too high for the Luxemburg use case. When calculating for example, cost per download, based on the data above, it more than doubles when taking into account duplicate downloads by the same user plus the free open access versions of articles, for which access does not need to be purchased from a publisher. **Patrick Peiffer** has worked at the National Library of Luxembourg since 2004. He is responsible for the national digital consortium. It provides licence lifecycle and access services for national, academic and public libraries, research centres, schools and governmental organisations. More at www.consortium.lu/about. Patrick also works on rights clearance, licensing and copyright. His current focus includes: Transforming consortial services, infrastructure and analytics to support open access, especially readmetrics.org
6.3	**Citation pollution**

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	Citation pollution refers to citations to articles in questionable (also fraudulent, fake, or inferior) publications. Some of the most prominent examples of questionable science include predatory journals and retracted research (www.retractionwatch.com). Through Citation pollution, questionable science can corrupt academic evaluation systems, mislead accreditation bodies, damage the professional standing and reputation of universities and scholars, hurt professional disciplines, and lead to wastage of resources. While it is straight-forward to use available scholarly tools and journal lists to choose a reputable title to cite or publish in, complexity arises when it comes to reviewing or assessing lists of references of research reports, theses, or scholarly manuscripts. So far, scholarly support services do not support scholars and other stakeholders to automatically and adequately identify and flag questionable publications. As a result, many authors unknowingly participate in citation pollution. What amplifies this problem is the idea of 'profitable science' combined with a publish-or-perish publication culture. Scientists must take heed against the risks of simply chasing citations, getting published, and 'riding the wave'. Using the case of retracted COVID-19 papers, the speaker illustrates the dilemma of citation pollution. He also briefly demonstrates a new reporting tool that can automatically check and flag questionable references in manuscripts and research publications. Since 2000, **Kirstin Krauss** has worked at five different South African universities. He has over 40 publications in the topic areas of ICT for development, critical ethnography, and higher education. Kirstin holds a PhD in Informatics from the University Pretoria. He has done editorial work for a number of journals and conferences. In his most recent role as professor in the School of Computing at UNISA, he focuses predominantly on postgraduate student development. Kirstin is a member of the Association of Information Systems, he is Advisory Board Member for Fidelior, he is a member of the Society for Intercultural Education, Training and Research (Europa–Africa), and he served as Education Chair for the AIS Special Interest Group on Global Development (2015-17)
6.4	**From silos to intersection: considering the open continuum** The different areas of 'open' are top of mind for may libraries. From open access to open science, to open infrastructure and open source, each area presents opportunities and challenges. How do we ensure the findability of open access literature? How do we go beyond the PDF and provide access to the underpinnings of research? How do we deliver optimal interoperability of the platforms and services that serve our libraries and its users? And can freely available and modifiable software deliver much needed flexibility in how platforms and services are deployed, managed, and extended? As we look to address these questions, one thing may be clear: the areas of 'open' do not exist in silos, but rather intersect. The findability of literature extends into the findability of related data sets. Our ability to readily collect and disseminate these outputs hinges on our ability to connect disparate applications from different providers. And our ability to manage research outputs in its different formats depends on our ability to extend our library platforms to readily manage research outputs as part of our overall collections. This presentation will look at the intersection of the areas of open. The presenter will consider how the library may best collect, preserve, disseminate, and manage the totality of research across areas of 'open'. Specific attention will be paid to the discovery of, and access to, research, open, connected collaboration platforms in support of open science and open source solutions that may best support innovation in library workflows. **Tamir Borensztajn** has served as EBSCO's Vice President of Software-as-a-Service (SaaS) and Open Strategy since 2014. In this role, Tamir helps inform and present EBSCO's software strategy while working with libraries worldwide to understand their systems and software needs. Prior to joining EBSCO, Tamir served as Executive Director, Public Sector Innovation EMEA at Infor. He is a graduate of Hebrew University of Jerusalem and holds a master's degree in Library Science from Simmons University in Boston.
C1	**Inspirational Storytelling** **Gcina Mhlophe**, born in 1959 in Hammarsdale, KwaZulu-Natal, has been writing and performing on stage and screen for over 20 years. She has written many children's books as well as adult audience poetry, short stories and plays. She produced and performed on a CD for children with Ladysmith Black Mambazo. She has written music for the SABC TV series *Gcina & Friends* where she performed her own stories for television audiences.
C2	**Closing remarks - Laila Vahed**