Ligue des Bibliothèques Européennes de Recherche
Association of European Research Libraries

AN ADVOCACY PLAN FOR LIBER

Introduction

LIBER is 'reinventing the library for the future'. This **Advocacy Plan** follows on from the LIBER Advocacy Strategy. In it, we let our libraries know how we are representing them and explain the process for our advocacy strategy development.

LIBER advocates on policies that are important to research libraries, identified by our engagement with our Participants and outlined in the overarching LIBER Strategy (2013-17). Contained within this Advocacy Plan are LIBER's priority issues, intended for all of LIBER - its Executive Board, office staff and members – to provide clear and consistent messages that research libraries can also use. The Advocacy Plan will be annually reviewed, reflecting changes in the library community and external influences such as EU legislative proposals.

In advocacy, timing is everything. That's why our engagement activities for the next year are set out within a structured timeline, via the **Advocacy Implementation Roadmap.** As well as LIBER libraries and policy shapers, we speak to the wider scholarly community, EU open science projects, (international) research organisations, funders, the media and other bodies working on the issues that affect research libraries. It is important to us that our Board members physically meet with these organisations. The Implementation Roadmap identifies those we aim to see over the next year (Annex 1).

The Advocacy Plan and its Implementation Roadmap will be made available on the LIBER website; its development will be the responsibility of the LIBER Advocacy Group. The Group will comprise the President, Vice-President, Steering Committee Chairs, Executive Director and current Adviser to the Executive Board. The Executive Board will be responsible for approving the Plan, which will be updated annually at the October LIBER Executive Board meeting. The LIBER Office will be responsible for coordinating updates in collaboration with the Advocacy Group.

What do we mean by advocacy? Promoting Key Messages

Advocacy, including lobbying, is the proactive recommendation of a policy or cause. LIBER advocates to make sure that policy shapers, stakeholders and the media know about the issues that matter to our libraries, our world class services and to put research libraries at the heart of the EU information chain. We advocate to provide our libraries with arguments to mobilise and help them in their training and awareness raising.

Via events, newsletters, social media and of course our website, LIBER continually works to advance the causes that matter to our libraries. We publish position statements, papers and factsheets on our key issues and we speak to thousands of librarians, academics and politicians every year at conferences, seminars, meetings and workshops.

In recent years there has been a marked increase in European Commission activities that have an impact on research libraries[1]. Through our Executive Board, our Steering Committees and the LIBER Office, we are regularly in contact with the European institutions to ensure that

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[1] http://ec.europa.eu/priorities/digital-single-market/

the priorities of research libraries remain high on the agenda. A fundamental part of this work is keeping LIBER Participants informed of our activities and ensuring that we accurately promote matters that are important to them, making the most of the opportunities offered at EU and international level and feeding back information.

Key Messages
Because LIBER works on a number of areas affected by ongoing EU policy and project developments, thematic advocacy factsheets are regularly prepared and reviewed in order to provide a more in depth explanation of our position on specific issues. New thematic areas will be defined by the Advocacy Group and approved by the LIBER Executive Board. Responsibility for drafting and updating thematic papers falls to the appropriate Steering Committees. Thematic advocacy factsheets will be updated annually.

The key areas for advocacy and lobbying have their foundation in LIBER's Strategy[2] and Strategic Directions[3]. At present, the priority areas are:
- **Copyright**
- **Text and Data Mining (TDM)**
- **Research Data Management (RDM)**
- **Open Access**
- **H2020 Preparations and Implementation**

LIBER is constantly developing its key advocacy messages and will encourage its libraries to help promote them.

Copyright
LIBER is advocating for a modern and fit-for-purpose European copyright regime that recognises the needs of R&D, education and scholarship. Such a regime is required in order to foster collaboration, competitiveness and innovation. We have developed a copyright factsheet for our members, which contains further information on how LIBER is actively lobbying to get the Information Society Directive (2001) reformed with the following

Key Messages:

1. **Support education, research and learning, by ensuring that exceptions for libraries, teaching and research are a right that cannot be overridden by contract.**

2. **Recognise the importance of the university knowledge transfer agenda by removing the condition that all exception based research copying is "non-commercial". Any exception for research should not distinguish between commercial and non-commercial research purposes.**

3. **Safeguard copyright exceptions and limitations from override by technological protection measures.**

4. **Support international collaboration by harmonising copyright exceptions and limitations and ensuring that they work across borders.**

5. **Increase the availability of digital content by reducing the term of copyright, allowing libraries to digitise content that is unavailable commercially and allowing the results of publically funded research to be made open access.**

6. **Recognise that the making of multiple copies is an intrinsic activity to the digital age by reducing the scope of the right of reproduction so that only copies of economic significance are considered as reproductions[4].**

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[2] http://libereurope.eu/wp-content/uploads/liber_strategic_plan_2013-2015_final_version.pdf
[3] Developing Leadership in Changing Times; Supporting the Case for Research Libraries; Enabling Open Science; Fostering New Models for Libraries

7. **Reduce barriers to open access by ensuring authors of publically funded research retain the right to secondary distribution and the right to waive compensation in order to make their outputs openly available.**

In the light of upcoming copyright review proposals from the Commission, LIBER also advocates that there should be a mandatory Text and Data Mining (TDM) exception on copyright.

Text and Data Mining
By harnessing big data, text and data mining will increase the progress of science exponentially. It has the potential to facilitate the discovery of cures for diseases such as cancer and Parkinson's. It has already been used to discover how existing drugs can be used to treat other conditions. It will act as a foundation for innovation and new industry. A copyright exception for TDM will enable libraries and their users to contribute greatly to an innovative and competitive Europe.

LIBER has developed a factsheet for our libraries, which contains further information in support of our

Key Messages on TDM:

1. **A lack of clarity around the legality of TDM is inhibiting TDM based research in Europe.**

2. **The solutions offered by publishers are not only insufficient to meet the needs of researchers, they are placing European researchers at a disadvantage.**

3. **The introduction of a mandatory exception that cannot be overridden by contracts is essential.**

4. **An exception for TDM that should allow those who have legal access to the content to extract facts and data from the content using automated methods such as crawling and scraping. We are not seeking to gain free access to copyrighted works.**

5. **TDM does not put unnecessary strain on publishers' infrastructure. Open Access publishers have confirmed this to be true.**

6. **TDM is concerned only with the extraction of non-copyrightable objects (facts and data), it makes no sense when drafting a law to address the technical shortcomings of the current copyright framework to limit that solution to non-commercial uses.**

The Hague Declaration as an Advocacy Tool for TDM
LIBER has been pro-active in coordinating the production of The Hague Declaration to emphasise the importance of TDM. The Hague Declaration aims to mobilise stakeholders behind better access to facts, data and ideas for knowledge discovery in the Digital Age. With its own Roadmap for Action it was produced in collaboration with international experts in various fields of science. It was formally launched in Brussels in May at the advent of the European Commission Digital Single Market Strategy. The Hague Declaration already has more than 400 signatures of support including over 200 organisations but we need more. LIBER will continue to raise the profile of the Declaration, within its networks, online and at the EU institutions.

Research Data Management (RDM)
Research data are a core asset in many research areas. With a growing variety of data types and a massive growth in volume, the management of research data is becoming increasingly important, not least for research institutions acknowledging the value of data by making sure data can be used today and in the future. Libraries are engaging at institutional, national and international levels to promote new roles for libraries in research data (e.g. the Research Data Alliance and several European projects).

LIBER advocates both to the EU institutions and for the benefit of members. **In its Libraries and Research Data factsheet, LIBER set out six key messages intended for libraries on RDM:**

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[4] http://www.lisboncouncil.net/publication/publication/95-copyright-reform-for-growth-and-jobs-modernising-the-european-copyright-framework.html

1. **Securing the future use of research data can best be achieved via an institutional policy on research data and strategies for its implementation. Libraries can provide expertise and are ready to collaborate with research administrators and IT units to achieve these goals.**

2. **There is no one-fits-all RDM solution. However, there will be similarities and differences in how researchers across disciplines work with data. Some areas will be fit for generic solutions and others need integration of special features and tools.**

3. **Balance the needs of all disciplines. The long-tail of diverse data from various disciplines,as well as data resulting from cross-domain research are equally important as the data that already have a home in a subject-based data repository.**

4. **Implementation requires new service roles. This will often involve creating new roles and job descriptions in libraries. Investment may need to be made in new staff or further qualification.**

5. **Continue exploring requirements and synergies. Challenging areas will likely include the need to establish legal and ethical advice on data privacy.**

6. **Curate and think of future needs. Data management plans should be treated as 'living documents' that need to be reviewed regularly.**

The copyright, TDM and RDM key messages were developed by the Working Group on Copyright, the Steering Committee on Advocacy and Communications and the Steering Committee on Scholarly Communication and Research Infrastructures. They have been communicated to LIBER Libraries and are available on the LIBER website.

Other Key Messages in Development
Other Key Message Factsheets are currently in development via appropriate the Steering Committees and are to be made available in 2015. They include:
- Open Access
- Horizon 2020

Below is a brief description of what LIBER will be advocating in these areas.

Open Access
LIBER advocates for Open Access of scholarly content. The results of scholarly research should be freely available to everyone, either by publishing the results of that research in an Open Access repository (Green OA) or by publishing in an Open Access journal (Gold OA). As an Association, LIBER is committed to transparent governance that serves its members, while at the same time offering the widest possible public access to its resources and knowledge. LIBER has published its own Open Access Publication Guidelines for works produced by LIBER and is a partner in the OpenAIRE project leading a pilot aimed at stimulating publishing in Open Access journals in Europe.

Horizon 2020 (H2020) Preparations and Implementation
Under the current Horizon 2020 programme, the Commission plans to work towards on a European Open Science Agenda with all concerned stakeholders. The recently announced Commission Open Science Cloud initiative will combine existing and future data infrastructures, offering secure and seamless access to European researchers for storing, managing and processing data from different sources. Through the work of the Steering Committees, LIBER will develop its evidence base and make the case for H2020 to support libraries in enabling the uptake of Open Science. LIBER will engage in the development of the Cloud for Open Science; ensuring that research libraries and their institutions are recognised as key actors in the Cloud.

Strategy Objectives
This Advocacy Plan will support the LIBER Strategy (2013-2017) and the Strategic Directions (Developing Leadership in Changing Times; Supporting the Case for Research Libraries; Enabling Open

Science; Fostering New Models for Libraries), as well as strategic alliances. In practical terms it will be carried out via the **Implementation and Communications Roadmap.**

Implementation and Communication Roadmap
The Implementation Roadmap consists of an organogram of target stakeholders (Annex 1) and a timeline for action (Annex 2). We ask the Executive Board and Advocacy Committee for their input. Once the content for Annex 1 and 2 is agreed, LIBER will set up a more detailed 'Get to Know' programme. It will include individual contacts, action points and proposed dates to facilitate collaboration between the Executive Board and key persons identified. The Roadmap, will be updated annually.

Communicating Advocacy
As with the general LIBER Communications Strategy, LIBER will use a variety of communications methods to convey advocacy work and key messages. In particular, they will be conveyed via the following communication channels:

- LIBER Conference, Advocacy workshop
- Websites (LIBER website, Hague Declaration website, websites of LIBER members, partners)
- Factsheet distribution, including open access, open licenses and Horizon 2020
- Social media (LinkedIn, Face Book Slide Share, Twitter, YouTube)
- LIBER Mailing lists (LIBER ALL, LIBER EXEC, LIBERNEWS), especially the four LIBERMailings.
- Presentations at conferences and workshops
- Face-to-face meetings with EU officials and other high-level contacts
- One-to-one contact with LIBER members, sponsors and the wider library community
- Interviews with the media including the Brussels press (Politico, EU Observer and Euractiv)

The Steering Committee on Advocacy and Communications will be responsible for the Advocacy Communications Plan, in collaboration with the LIBER Office.

LIBER Advocacy Group

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