



EDITORIAL

Herd Behavior Led by Taiwan Open Access Policy

Open Access (hereinafter referred to as OA) in international scholarly publishing is cultivated with profound historical background, factors related to industrial structure, the priority in state policies, the special political and economic environment, and linguistic disparities. Since Taiwan is in a very special situation and struggles to survive, pursuing OA from the west ignorantly without distinguishing itself nor responding to the dilemma will demolish the soundness of Taiwan scholarly publishing industry and the opportunity for sustainable development.

Historically, the accomplishment in western scholarly publishing industry even led to the so-called “trust” monopoly, the crisis in journal price, and promoted the recent Journal Transformative Agreements for libraries and that proves OA policy has been international mainstream thought. All these reflections and operation have certainly attributed to a friendly and reasonable market environment for scholarly journal publishing with improvement and at least prevailed the power of librarianship in defending public resources. The stakeholders of all these incidents have composed a scholarly community with journal authors, journal publishers, database vendors, libraries and scholars (readers) from countries across the world who can hardly be excused from this controversy of OA and anti-OA. Thus there is no exception for Taiwan. However, is this simple and pure thinking correct? What role or roles has Taiwan played while facing the academic war of century? The answer is, we have played all user roles but were incapable of taking the critical part as producers.

Undoubtedly, the academic field of English writing, and the multinational corporations built and operated by large scholarly publishing groups or database companies are the main targets to conquer and the battlefield of this war. Taiwan, in addition to publishing English academic articles, has much massive market needs in Chinese scholarly publishing and publication. The environment in Taiwan is completely different from that in international OA movement with distinct historical development background and market needs. In other words, Taiwan surely should meet international OA trend, take the same side and act accordingly; yet Taiwan should adopt two-hand strategy to differentiate internal and external moves. For international database procurement for library, Taiwan should be at the same path of international alliance; yet for Taiwan scholarly publication market/industry, Taiwan should be extremely cautious and respond rationally.

Without considering the value of knowledge economy nor too much detail on copyright, Taiwan should be able to align with current OA trend and prioritize “academic information for public sector” as the first OA subject. Nevertheless the reality reveals a huge gap to ideal situation and requires thorough auditing in responsible agencies like National Science Council, Ministry of Culture, Ministry of Education, National Development Council, the discernment on international reality, and control on work priority rather than acting separately. Many public sectors mumbled OA slogans without comprehension but implement policies with conservation and contradiction. For example, national universities concern not requiring licensing fee from external OA institutions may violate the relevant regulations on property usage of public institutions and even break the laws for “profiting from merchants”? Thus, potential partners and opportunities for OA cooperation are excluded recklessly for the concerns above while overseas OA institutions may enjoy the generous dedication without actually paying any licensing fee to address the concept of “bringing Taiwan to the world” and “internationalization”? Furthermore: recently government intended to invest in establishing “the system for paper submission and review” for academic articles without acknowledging the utmost needs should be based on necessity and the deployment to review “theses for academic seminars” for all universities and academy associations should be prioritized rather than to scholarly journals! Policies lacking understanding on market mechanism nor development status, measures based on preference, and improper OA policies are of great concerns.

National OA policy should be evaluated cautiously with consideration on Chinese environment, state conditions, and industries to avoid impetuosity and bigotry! It is unwise that Taiwan just followed international OA movement blindly without tracks (means and goals), timeframe (observing timing and prior alerts), debates (the necessity of Taiwan OA policies) and that led to the emergence of recent “the Herd Behavior”. In addition, the soundness of Taiwan scholarly publishing industry has been jeopardized consequently for its political concerns, followed by nearly anti-business measures which are cultivated by the reality pressure and political climate of the industry-government-university alliance bowing to OA trend. OA policy lacking debates nor discerns is a simplified mainstream moral consciousness and permanent saboteur to Taiwan scholarly publishing environment.

Finally, in this Issue 3 of Volume 59, 12 manuscripts have gone through the review process, we have accepted four manuscripts and rejected eight with a rejection rate of 66.7% (8 out of 12). Several manuscripts are still in the review process. The four manuscripts published in this issue include “A Study

on Taiwanese Scholars' Perceptions and Practices of Open Access Journals” by Hao-Ren Ke; “Multimodal E-Book Co-Reading Practices Between Parents and Children” by Guan-Ming Chen and Chien Wen (Tina) Yuan; “Open Access Mega Journals: Development, Peer Review Mechanism, and Suggested Practices for the Academia” by Sophia Jui-An Pan and “Understanding the OA2020 and ESAC Initiatives: The reflection of Transformative Agreements in Taiwan” by Meng-Ling Lin. We would like to thank these scholars for their excellent contribution and generous permission for making the peer review’s comments and rebuttal open.

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編者言

台灣Open Access政策下的羊群效應

國際間學術出版的「開放取用」(Open Access, 以下簡稱OA)運動之形成, 有其深刻的歷史背景、產業結構因素、國家政策次序、政治經濟特殊環境, 以及語種差異等。台灣處於一個夾縫中求生存的極特別處境, 一味追求西方的OA運動, 卻不能區別自身差異處和困境而予以因應, 將斷送台灣學術出版產業的健全, 以及永續發展之機會。

歷史上, 西方之學術出版產業茁壯甚至造成所謂的「托拉斯」壟斷、期刊價格危機等事件, 以及新近之圖書館「期刊轉型化合約」(Journal Transformative Agreements)的推動, 都證明了OA政策早已經是國際間的主流思潮。這些反思與運作, 的確讓整個學術期刊出版市場環境更為友善和合理, 也至少使得圖書館事業(librarianship)向來捍衛公共資源的力量得到伸張。這些事件的利益關係人, 也就是期刊作者、期刊出版者、資料庫廠商、圖書館和學者(讀者)等角色所形成的學術群體(scholarly community), 橫跨世界各國, 只要涉及了任一角色, 幾乎都難逃這項OA與反AO的爭議中, 因此台灣當然不例外。然而, 這樣的簡易且單純的思維是對的嗎? 在躬逢這場世紀學術大戰之中, 台灣究竟又參與了哪一類或哪幾項角色? 答案是: 我們扮演了使用者的所有角色, 卻無力擔綱生產者的關鍵角色。

毫無疑問地, 以英文寫作之學術園地, 並由大型學術出版集團或資料庫產商所建置營銷的跨國事業, 是這一戰役的主要征戰對象和戰場。台灣, 除了英文學術文章的發表之外, 更有著更龐大的中文學術發表與出版市場需求。台灣有著與國際OA運動截然不同的大環境, 或說另有著不同歷史發展背景與需求的市場環境。換言之, 台灣確實必須迎接國際OA潮流, 與其同戰線和作為; 但應該「裡外有別」採取兩手策略。對於圖書館涉及國外資料庫採購事項, 與國際同軌、同陣線; 但對於台灣之學術出版市場/產業, 則應格外謹慎並理性因應。

在不思考知識經濟的價值, 亦不做太多著作權細部因素考量下, 台灣若要依循現今OA潮流, 理當將「公部門學術資訊」優先做為OA的首要標的, 可惜目前離理想仍有一大段差距, 更需要國科會、文化部、教育部、國家發展委員等職責機構徹底盤點、認清國際現實、掌握工作次序, 而非各個部會分頭為政。許多公部門(public sector)口說著不明究理的OA口號, 但所行政策卻是保守與矛盾之舉。例如: 國立大學擔心無償授權外部機構OA之舉, 恐有違公家機構財產運用等相關法律, 甚至憂心「圖利商人」而觸法? 因此恣意以相關理由, 來排擠可能潛在的OA合作對象和機會, 但若遇到國外OA機構時, 即使

未有任何的實質授權金收入，為了強調「國際化」、「讓世界看得見台灣」思維下，可能仍是熱衷地傾囊授與？又如：近來政府意欲投資自設學術文章「投審稿系統」，但是，殊不知此舉最大的需求於必要性，反而應該先用於提供給所有大學與學會組織之「學術研討會論文」而不是學術期刊之用！不究明市場機制、發展現況的政策，只憑感覺好惡的措施，連同失去章法的OA政策，都令人憂心。

國家的OA政策必須謹慎評估，考量中文環境、國情、產業等因素，不可躁進，形成盲流！台灣盲目跟從國際OA運動思維，不分軌（手段與目標）、不分時（時機觀察和預警）、不辯證（台灣OA政策需求性）而出現近似產生跟風似的「羊群效應」（the Herd Behavior），可謂相當不智。此外，台灣也在其他政治因素考量上，連帶波及自身學術出版產業的健全，再加上整體產官學界因為迎合OA思潮，所形成的事實壓力與政治氛圍，幾乎已經是反商似的舉措。不思辯又不辨明的OA政策，在台灣的學術出版環境是一種簡化了的主流道德意識，也是永遠的破壞者。

最後我們仍綜結本卷期（59卷3期）之評閱作業，含前置編務審查作業共計12篇稿件，收錄篇數四篇，完成外審評閱作業流程之退稿八篇，退稿率為66.7%，其他多數餘稿仍在評閱流程途中。收錄四篇大作分別為柯皓仁發表的「台灣學者開放取用期刊認知與實踐之研究」、陳冠銘與袁千雯的「以不同形式電子書為媒介的親子共讀閱讀行為研究」、潘璿安發表的「開放取用巨型期刊的發展、同儕審查制度與學術界的因應作法」，以及林孟玲的「解析OA2020倡議和ESAC倡議：台灣轉型化合約的省思與探索」。本刊衷心感謝這些學者的最佳貢獻與慷慨的OPR意願。

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