WHERE NEXT FOR OPEN ACCESS IN EUROPE?

ROB JOHNSON, DIRECTOR, RESEARCH CONSULTING
Open access

1. OA policy in Europe
2. State of the OA market
3. Priorities for action
4. Implications for Research Managers
Towards a competitive and sustainable open access publishing market in Europe

Findings from a recent study of the European open access market

Prepared for OpenAIRE, on behalf of the European Commission

https://doi.org/10.5281/zenodo.401029
The OpenAIRE e-infrastructure in a nutshell

- Registries
  - Validation
- Funding information
  - Cleaning & Transformation
- CRIS systems
  - De-duplication
- Data repositories
  - Classification
- Publication repositories
  - Citation
- Open Access Journals
  - Linking

Research output in context
OA policy in Europe
Pathways to OA

- Gold-hybrid (incl. offsetting)
- Gold-APC
- Gold no-APC
- OA archiving
EC Policy on Open Access

• July 2012: Recommendation on "Access to and preservation of scientific information" and Communication "Towards better access to scientific information: boosting the benefits of public investments in research";

• 2013: Horizon 2020 (2014-2020) general principles on OA and Open Data

• February 2015: "Validation of the results of the public consultation on Science 2.0: Science in Transition"

• May 2015: "A Digital Single Market Strategy for Europe", acknowledges the importance of science and research to boost innovation

• May 2016: EU Council “Conclusions on the Transition Towards an Open Science System”
[The EU Council] AGREES to further promote the mainstreaming of open access to scientific publications by continuing to support a transition to immediate open access as the default by 2020...

Council of the European Union. (2016). Council conclusions on the transition towards an open science system
Why immediate OA?

- Public good
- Cost savings
- Industry influence
- Copyright and licensing
Who wants what?

By member state

- Gold: 43%
- Both: 36%
- Green: 21%

By share of EU-28 publications

- Gold: 30%
- Both: 50%
- Green: 21%
State of the OA market
Immediate OA % (World)

Trends in the share of scientific publications available in open access (total, green and gold) at the ERA-wide level (2005–2015)

Pathways to immediate OA - market share (2014)

- Gold-APC: 83.4%
- Gold-noAPC: 16.6%
- Gold-Hybrid: 9.6%
- Subscription: 4.6%
Global share of Science & Engineering articles

Value of the OA market

Journal market: 10,000 (USD million)
OA publications: 500 (USD million)
5,000 – 10,000
Journal publishers in the global market

50%
Proportion of articles from top 5 publishers
$4,000-5,000
Average revenue for a subscription article

$1,500-2,500
Average APC
## Competition problems

<table>
<thead>
<tr>
<th>Problem Description</th>
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<tbody>
<tr>
<td>Mini-monopolies: top journals as non-substitutable goods</td>
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<tr>
<td>Career incentives: reward publishing in high ‘IF’ journals</td>
</tr>
<tr>
<td>Cultural bias against OA publications (discipline-specific)</td>
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<tr>
<td>Excessive market concentration</td>
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<tr>
<td>Lack of price transparency (non-disclosure clauses)</td>
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</table>

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# Sustainability problems

<table>
<thead>
<tr>
<th>Supply-side</th>
<th>Demand-side</th>
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<tbody>
<tr>
<td>Uncompetitive APCs (no flipping)</td>
<td>Big deals take up majority of library budgets</td>
</tr>
<tr>
<td>Threat to revenues from licensing and corporate subscriptions</td>
<td>Additional costs from gold OA in the short term, uneven distribution in the long-term</td>
</tr>
<tr>
<td>Lack of scalable revenues for APC-free OA journals</td>
<td>Lack of publication waivers in mid-income countries</td>
</tr>
</tbody>
</table>
Priorities for action
Incentivise actors

**Author incentives:** create incentives/removes disincentives for authors to publish OA

**Publisher incentives:** provide subscription publishers with a viable route to flip their business model to open access
Disrupt the market

**Competition:** improve competition in the scholarly publishing market

**Pluralism:** enable diverse approaches that are tailored to the differing national and disciplinary contexts
Create the infrastructure

**Infrastructure:** support the efficient delivery of open access at scale

**Monitoring:** create effective mechanisms to monitor compliance and assess sustainability
Recommendations from 20 studies

- Offset subscriptions and OA expenditure
- Strengthen consortia and pursue collective action
- Promote changes in author behaviour and incentives
- Develop repository infrastructure
- Support Gold no-APC platforms (non-commercial)
- Improve transparency of publication costs
- Develop monitoring mechanisms (proportion of OA content)
- Provide support for APCs (funders)
- Develop monitoring mechanisms (landscape and stakeholders)
- Standardise licensing (including support for TDM)
- Strengthen policies on open-access archiving
- Establish APC funds (institutions)
- Enable retention of copyright by author
- Implement or strengthen limitations on embargo periods
- Pursue redirection and reorganisation of budgets

Number of studies

- Hybrid
- General
- Green OA
- Gold no-APC
- Gold APC

Recommendations from 20 studies
Implications for Research Managers
Whose responsibility is it to support OA?
Availability of funding

Source: Survey of 300 recipients of funding under the FP7 post-grant open access pilot
Open Access @ Strathclyde
An institutional case study

Slides prepared by Pablo de Castro, Open Access Advocacy Librarian
pablo.de-castro@strath.ac.uk
Open Access management

- Pure CRIS sits at the centre – with an automated Scopus feed
- Institutional OA policy requires deposit of accepted author manuscript into the CRIS, where compliance is verified
- Metadata & full-text transferred to Strathprints repository via a connector
- Pure also used for RDM
Effective OA policies

- HEFCE OA policy requires deposit of AAM within 3 months of acceptance
- This policy is linked to the UK research assessment exercise (REF)
- A number of funders (Research Councils UK and the Wellcome Trust among others) also provide support for Article Processing Charges (APCs) and Gold Open Access via institutional block grants
Monitoring OA policy compliance

- Monitoring progress an increasingly important area, both for total level of OA and for APC payments
- Easier to do at institutional level, but initiatives like the Jisc Monitor project aim for national-level aggregation

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<td>AAM Required</td>
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<td>Exceptions</td>
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<td>Possible Non Compliance</td>
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Monitor UK:
- Shared application aggregating and presenting data analytics
- Institutions and funders can evaluate cost and compliance data

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Institutional monitoring of HEFCE OA policy at U Strathclyde: over 90% compliance
Takeaways

• EC policy is immediate OA as the default by 2020

• Current trajectory suggests this won’t happen till 2025-2030

• There’s no ‘silver bullet’...

• But new initiatives and tighter policy requirements are likely
Towards a competitive and sustainable open access publishing market in Europe

A study prepared for the OpenAIRE 2020 project, on behalf of the European Commission

February 2017

• For more information see: https://doi.org/10.5281/zenodo.401029
Thank you

Full report is available at:

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