



Scholarly Publishing & Academic Resources Coalition
An initiative of the Association of Research Libraries

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Half Full: The Improving State of Scholarly Publishing

3rd Workshop on the Open Archives Initiative
February 12-14, 2004

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Our goal . . .

Provide some evidence for evaluating:

- Is the state of scholarly publishing improving—or getting worse?



Our goal . . .

Provide some context for evaluating:

- Is the state of scholarly publishing improving—or getting worse?

In other words:

- Are Open Access initiatives having any impact on scholarly publishing?



A Matter of Perspective

Is the glass half empty?

- The pace of change in scholarly publishing is agonizingly slow & relatively slight.





A Matter of Perspective

The glass half full—

- The various initiatives are having a cumulative effect & are gaining momentum.





Half Empty

But first, the bad news—





Half Empty

- Commercial consolidation

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Half Empty

- Commercial consolidation
- Commercial earnings

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Half Empty

- Commercial consolidation
- Commercial earnings
- Bundling & price increases





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Open Access threat to Science Direct:
“ . . . a lot of noise ”



Even Bad News May Be Good

- Couldn't ask for a better environment for change:
 - Library budget situation getting worse—renders current situation untenable
 - Higher education in financial straits—forces university administrators to confront systemic issues
 - Large STM publishers continue to merge—waving flags at regulators



Preconditions for Change

Sine quibus non for change—



Preconditions for Change

Sine quibus non for change—

- Demonstrate benefits of Open Access to authors & other stakeholders
 - Gated models narrow access
 - Open access increases visibility & impact



Preconditions for Change

Sine quibus non for change—

- Demonstrate benefits of Open Access to authors & other stakeholders
- Establish viable business models capable of sustaining Open Access



Visibility Beyond Library

Researcher awareness & activism—

- Faculty reaction to “Big Deals”—Cornell, Harvard, TRLN all rejected Elsevier bundles
- Growth in OA journals—launch of PLOS; growth of BMC

“ [‘Big Deal’] is not sustainable at all.
Nobody can pay for it.”

Biology Professor

University of North Carolina



Visibility Beyond Library

Open Access in the News—

- *Wall Street Journal* cites Open Access as one of top 10 health stories of 2003 (30/12/03)
- *Nature* includes the rise of Open Access among 5 major science stories of 2003 (18/12/03)
- *Science Magazine* lists Open Access among 7 “breakthroughs” of 2003 (19/12/03)
- *The Scientist* includes Open Access among 5 major science stories of 2003 (15/12/03)



Indicators of Market Impact

Outsell—

“ . . . The Open Access movement is consolidating into a serious force. . . . It’s here to stay.”



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“ . . .gaining legitimacy.”

“ . . .it may already be too late”—for commercial STM publishers



Indicators of Market Impact

Financial Analyst Warnings—

- *WSJ* cites the threat posed by Open Access to RE's pricing power
- Stock decline also attributed to competition from BMC
- Goldman, Citigroup Smith Barney & BNP Paribas downgrade Reed Elsevier due to concerns over long-term pricing power



Government Attention

Increased Governmental Attention—

- U.K. Science & Technology Committee Inquiry into Scientific Publications
- “Public Access to Science” Act introduced to U.S. Congress



Institutional Repositories

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- Increasing number of implementations
- National initiatives in support of repositories also growing—
 - DARE in the Netherlands
 - SHERPA in the U.K.
 - Australian Department of Education, Science & Training



Increased Visibility & Benefits

1) Demonstrate benefits of Open Access to authors & other stakeholders

- Increased faculty awareness
- Growing public awareness
- Mounting financial impact
- Beginnings of government attention
- Spread of institutional repositories



Second Precondition for Change

Sine qua non for change—

- 2) Establish viable business models
capable of sustaining Open Access



Second Precondition for Change

Sine qua non for change—

2) Establish viable business models capable of sustaining Open Access

- Professional advancement for authors
- Access to knowledge for researchers
- Informs promotion decisions for institutions
- Allows societies to serve their members



Open Access Business Models

- Input-side fees—article publication fees
— publication funded by grant or institutional support



Open Access Business Models

- Input-side fees—article publication fees — publication funded by grant or institutional support
- Sponsorships & advertising



Open Access Business Models

- Input-side fees—article publication fees — publication funded by grant or institutional support
- Sponsorships & advertising
- Differentiated print & online versions — open access online & fee-based print version



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- Subsidies from member dues allocations, grants, donations, in-kind contributions



Open Access Business Models

Impediments to new models—



Open Access Business Models

Impediments to new models—

- Innate conservatism



Open Access Business Models

Impediments to new models—

- Innate conservatism
- Need for active vs passive model



Open Access Business Models

Impediments to new models—

- Innate conservatism
- Need for active vs passive model
- Lack of resources for change



Open Access Business Models

Impediments to new models—

- Innate conservatism
- Need for active vs passive model
- Lack of resources
- Complex variety in practice



Open Access Business Models

Increase in input-side funding

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Open Access Business Models

Increase in input-side funding:

- Howard Hughes Medical Institute





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- Wellcome Trust





Open Access Business Models

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- Berlin Declaration on Open Access





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- Wellcome Trust
- Berlin Declaration on Open Access
- JISC funding
- OECD Policy Declaration





Open Access Business Models

Open Access transitions include:

- American Physiological Society
- Company of Biologists
- Oxford University Press
- National Institutes of Health



Open Access Business Models

OSI Business Planning Guides

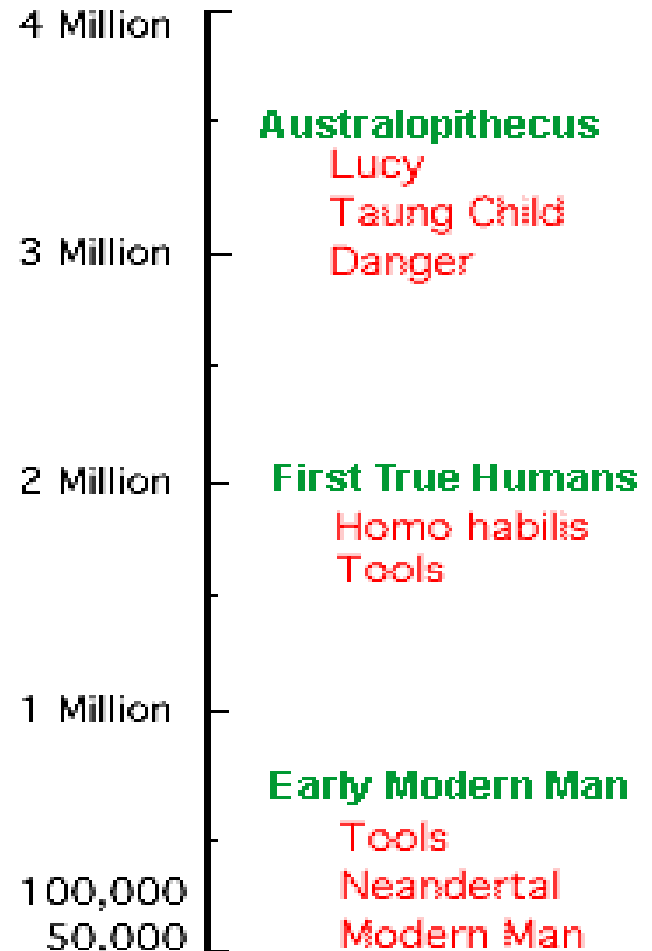
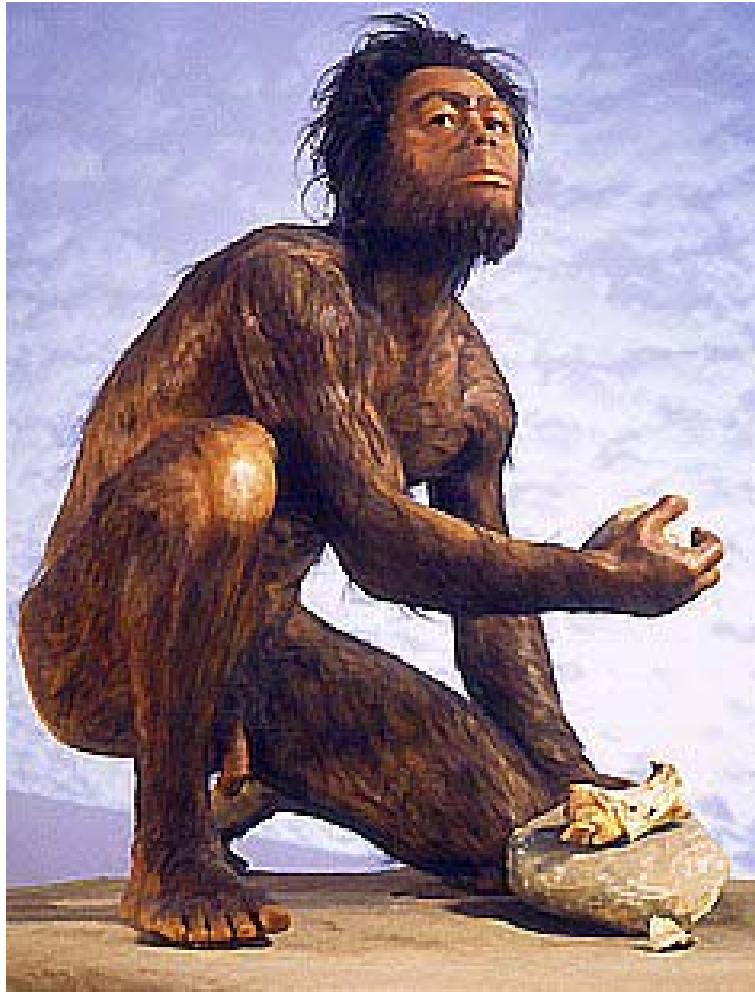
SPARC supporting transition planning

- Institute of Mathematical Statistics
- *Online Journal of Issues in Nursing*
- *Water Quality Research Journal*
- “Next Steps” program



Take the Long View

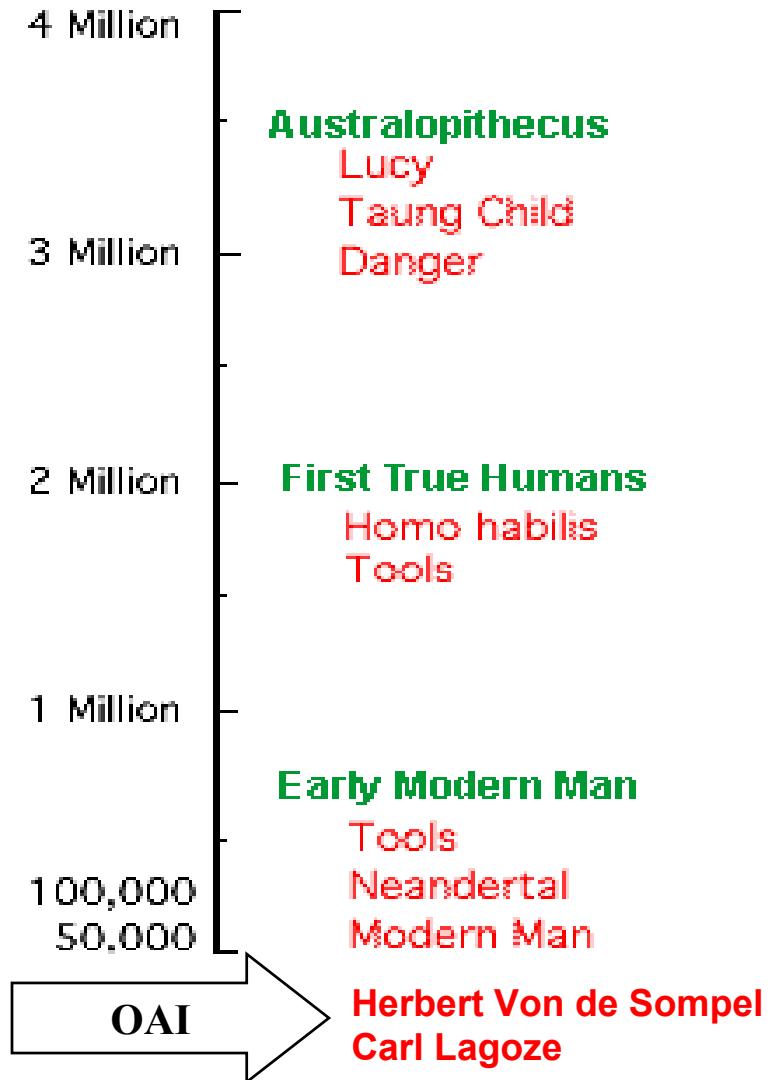
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Take the Long View

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For an ongoing chronicle—

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The SPARC Open Access Newsletter

<http://www.earlham.edu/~peters/fos/>

&

Open Access News

<http://www.earlham.edu/~peters/fos/fosblog.html>

By Peter Suber