How are subscription publishers making the transition to open access (OA)?

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Overview

• The third age
• Transition issues
• Progress
• The to do list
• The future?

http://www.flickr.com/photos/shoebappa/447929638/sizes/l/in/photostream/
• The ‘third age’ of publishing
  – subscription, site licences and OA
• Increased focus on authors as downstream customers
• Increasing influence of funders and policymakers
  – RCUK policy, OSTP memo, Horizon2020
• Need for publishers to offer choice to authors
  – publication in trusted outlets
  – Green and Gold OA and subscription options
• Must ensure sustainability of existing titles
  – Often published with society partners

Openness - new players, new politics
• Academic division of Informa PLC
  – 1,800 journals (2/3 in SSAH) & Books division
  – Average online-only subscription price USD 480 / 608
  – +500 journals published on behalf of societies

• OA timeline
  – 2003: Author Rights policy formalised (Green OA)
    – AOM posting without embargo
    – AAM with 12 or 18 month embargo (S&T / SSAH)
  – 2006: iOpenAccess (now Open Select)
  – 2011: LIS ‘zero embargo’ pilot begins
  – 2011: Open portfolio (+ 20 titles)
Annual Gold OA content represents <1% of total published articles
Transition issues
• Increased granularity, variation, complexity
• APC mechanisms
• Implications for subscription business
  – Conversion to (Gold) OA would render many journals unsustainable
• Anticipating OA policies and mandates
• Internal and external reporting
• Cost

Operational
• Funding / business models
  - Third party revenue
• Researcher needs / behaviour
• Subject differences
• New peer review models
• Hybrid OA
• Liability
  - CC BY (third party content)

• Dichotomies
  - Licensing
  - Green OA
  - Openness
  - Efficiencies

Strategic
Self-archiving or automated?

Gold OA

Journal vs repository publication

Diamond

Gratis

Embargoes

Platinum

Libre

Article versions?

Availability / reusability

Delayed Gold
• Society partner / editor briefing documents
• Focus groups, workshops, meetings….
• Discussion with librarians
• Marketing and social media efforts
  – Aimed to inform researchers of options
• Membership of OASPA
• OA author survey (+14,700 responses)
  – Informing our policies, broadcast externally
• White paper publication, webinars, presentation
  – “Facilitating access to free online resources: challenges and opportunities for the library community”
• Green OA
  – HEFCE-funded BA half life research
  – LIS ‘zero embargo’ pilot
  – Participation in CHORUS

External / Outreach
• OA Project team
• Process improvements
  – Knowledgeable staff
  – Metadata
  – Internal training
• CC BY, CC BY-NC and T&F LTP option
  – Permitting TDM
• Author choice
  – Gold / Green / licences, etc
• Improved online presence
• Gold OA option on 95% journals
• Subscription adjustment policy
• Additional APC process

Practical / technical
• Dedicated Customer Service team
• Work to author / HEI requirements
  – Pre-filtering, validation, split payments, etc.
  – Can adapt to different process flows
• Can handle multiple currencies, different price points, discounts
• Supported by Rightslink for ‘standard’ payments
• Useful learning process
  – Will inform development of automated system
  – Easy to adjust and improve process
• Less efficient than automated system
• Increased admin
  • High level of author interaction
  • Human error
• Adjusted Production workflows

APC management

Choice of OA (Gold / Green) or subscription remains with the author

• Streamlined author process
• Transparency (funding / APCs)
• Single point of data entry
• Reduced level of intervention
• Reporting functionality
Change within and without
A new Open Access publisher that puts author interests at the heart of everything we do.

Cogent Engineering
Cogent Education
Cogent Medicine
Cogent Economics & Finance
• Consistent OA terminology
• Continued consultation with funders, policymakers, society partners, editors, researchers....
• Longitudinal research
  – Author surveys
• UK Public Library Initiative
• Cost-benefit analyses
• Improved discoverability of hybrid OA content
• Improved APC system

The to do list
• Role of repositories (JISC Open Mirror)
• What about learned societies, smaller publishers
• Reducing cost, increasing efficiencies in increasingly granular world
  – Economic fairness for authors, funders, and libraries
• Reinvention or evolution of the publishing industry?
  – Must serve the needs of the Academy
  – Value of VoR, grey literature, open data
  – Better services for funders and authors
  – Trusted publication outlets
  – Public access to be as wide as possible
    • Development and emerging country programmes
• Quality assurance vs universal accessibility
  – Working with librarians
  – Impact measurement (usage, citation?)
  – Article / researcher driven metrics

The future?
Thank you?