Intermediaries: a brief overview of current service offerings in OA

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Ann Lawson
Agenda

- Intermediating what?
- Why bother with an intermediary?
- APC processing - overview of current options
- Importance of standards
Who are the intermediaries?

Authors  Publishers  Service providers  Librarians  Users
Intermediating what?

What is the point?
To make knowledge discoverable, accessible, intelligible, assessable and usable

Who is the customer? And who the vendor?

Service providers
be good *and* relevant or be disintermediated

Public engagement
OA business models
Types of intermediary in OA space

- Editorial
- Peer review
- Language-checking
- Data/TDM
- Repository
- Preservation
- Discovery
- Article-marketing

- Altmetrics
- (meta)data
- Journal comparison
- Hosting
- Jisc et al
- Standards (CrossRef NISO)
- Info (e.g., DOAJ, SHERPA Fact)
- Transactional
Types of intermediary in OA space

editorial  Peer review  Language-checking  Data/TDM  Repository  Preservation  Discovery  Article-marketing

Altmetrics  (meta)data  Journal comparison  Hosting  Jisc et al  Standards (Cross Ref, NISO)  Info (e.g., DOAJ, SHERPA A Fact)

transactional
Some Current Points of Tension…

- Complex workflows
- Money management
- Author involvement
pros and cons
- relatively low volume
- exploring options → better decisions
- scalability
Intermediary value?

Reduce complexity
Save money – take cost out of system
Save time

Needs careful management
Funding Institutions

Publishers/service providers

Transactional intermediaries
Launched in January 2012
Purpose: to reduce the time and cost of APC management for authors, universities, researcher funders, learned societies and publishers.
OAK provides an online workflow, seamlessly connecting all participants.
Successes 1: Managed APC payments from 65 countries, from over 400 leading research universities and institutes to 120 leading academic publishers
Successes 2: OAK delivers financial data and also article metadata directly to university libraries and content repositories – reduces the workloads of individual researchers and provides central co-ordination and oversight of APC expenditure and published content
Concerns: Librarians are still having to manage and co-ordinate APC payments – need more support and resources from university finance departments and research funders
Future Plans: Integration with production platforms and university content management systems. Deliver new functionality for emerging new OA business models.
Launched
APC service launched June 2013
APC platform - soft launch November 2013, development on-going

Purpose
Academic and Government Research institutions – initially UK, EU & US

successes
Huge interest – initial slow take up. As libraries explore/establish internal workflows we anticipate increased adoption as scalability issues arise

issues/concerns/ideas
urgent need for standardisation: processes/workflows/terminology and data exchange to include e.g. licence terms (CC-BY etc), DOI (version of record etc.)

future plans
Develop platform and above processes, plus publisher platform
Purpose:
- transactional processing for APCs
- “one-stop” shop for approval, payment and reporting
- Primarily an institutional service – with institutional, publisher, funder and author interfaces
- New system and software
- Traditional transactional benefits – currency conversion, prepayment
- Builds on EBSCO contacts and customer service
- Publisher benefits – quicker payment, no AR work, simple processes, data exchange using APIs

Launch: tba
• Working closely with publisher clients
• Several dozen publisher clients
• Developing a bespoke, fully-integrated service for OA
• Potential for interface with institutions
• Due 2015
RightsLink® for Open Access

**Purpose:** Innovative Author Charge Management Solution

- Seamless integration with editorial and production workflows
- Supports range of pricing exceptions, waivers, and discounts
- Dedicated customer service to authors
- Advanced billing and collections services
- Robust reporting; easy compliance with funding requirements

Configurable, standard offer for diverse business models

Built based on 10 years of managing author payments
Used by top scholarly and scientific publishers globally

More information: [www.copyright.com/openaccess](http://www.copyright.com/openaccess)
Other initiatives

Harrassowitz
Aries, ScholarOne and other submission & peer review systems
New players
  Familiar faces
  Market entrants

Library-choice vs. publisher-choice
Who pays?
Issues for (APC) intermediaries

• changing landscape
  • uncertainly around mandates
  • standards under development
  • evolving business models
• investment/ROI – low volume and limited territories, despite high growth
• low margins
• transparency and reporting – and desire to be fair/neutral
Standards
Conclusions

Consider the whole process and supply chain (moving target)
Consider where value may lie
Try it out
Where are your own points of need?
Review options regularly
Manage them well – key role for library
Ensure value for money
Thank You

Ann Lawson
alawson@ebsco.com