

Subscription Offsetting at SAGE

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27th May, 2015

SAGE Approach

- Worked with JISC to ensure a fair and sustainable model for hybrid Open.
- Locally – to support the UK HE market offering heavily discounted APC's for consortia customers. All NESLi2, SHEDL and WHEEL subscribers to the SAGE Premier collection.
- Globally - reducing the subscription prices of SAGE owned journals as where more than 5% of articles are published as Gold OA.

Subscription Offsetting Policy

- If more than 5% of articles in any title are published as Hybrid OA the future price will be discounted.
- Discount based primarily on proportion of content published as Gold OA. If 5% of the content is OA, the price will be discounted by 5%.
- Where OA revenue received accounts for a lower percentage than the percentage of content subscription price discounted by the proportion of revenue rather than the proportion of content which is OA. This reflects highly discounted rates offers to NESLi and UKB.
- Moving to a 3 year rolling average to smooth out annual variations
- Applied to SAGE owned journals. We encourage all society partners but they ultimately have a veto.
- For 2015, 12 journals benefitted from global offsetting. In 2016, 11 titles will benefit.

Operational Challenges

- SAGE Choice Uptake < 0.5% of total output
 - Only 12 titles reached the 5% threshold in 2015
 - Only 11 will reach it in 2016
- 2/3rd of SAGE output has little or no direct funding
- Author behaviour being driven externally
 - Author Education
 - Author Compliance
- Standards and identifiers
 - Need to be developed
 - Need to be built into to our systems
- Local vs Global