



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

[www.arl.org/sparc](http://www.arl.org/sparc)

# Half Full: The Improving State of Scholarly Publishing

3rd Workshop on the Open Archives Initiative  
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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
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- 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—



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*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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“ . . .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



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- Sponsorships & advertising



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- 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—



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- 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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- JISC funding





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- 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

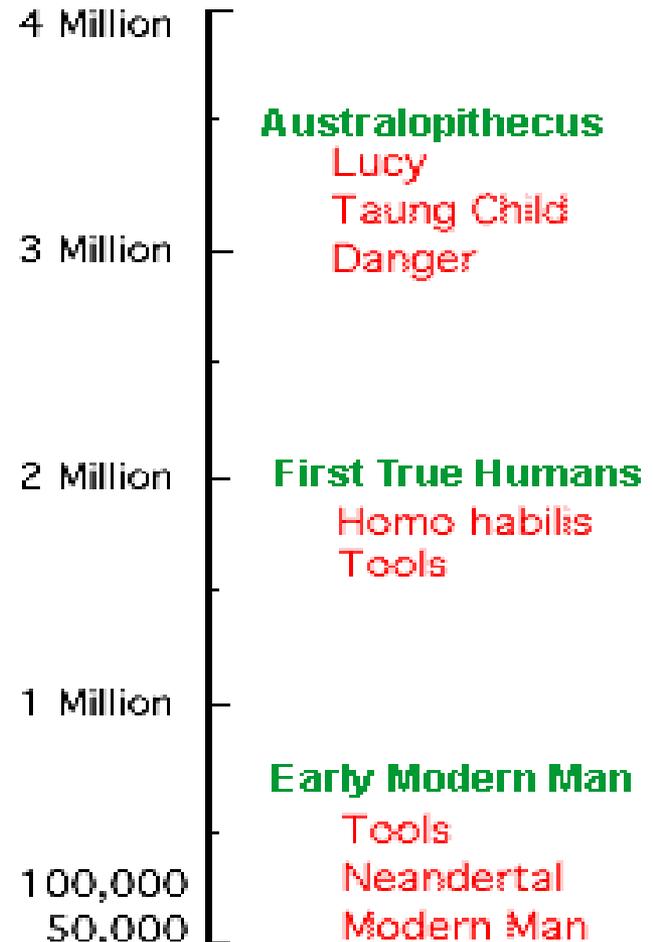
SPARC supporting transition planning

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



# Take the Long View

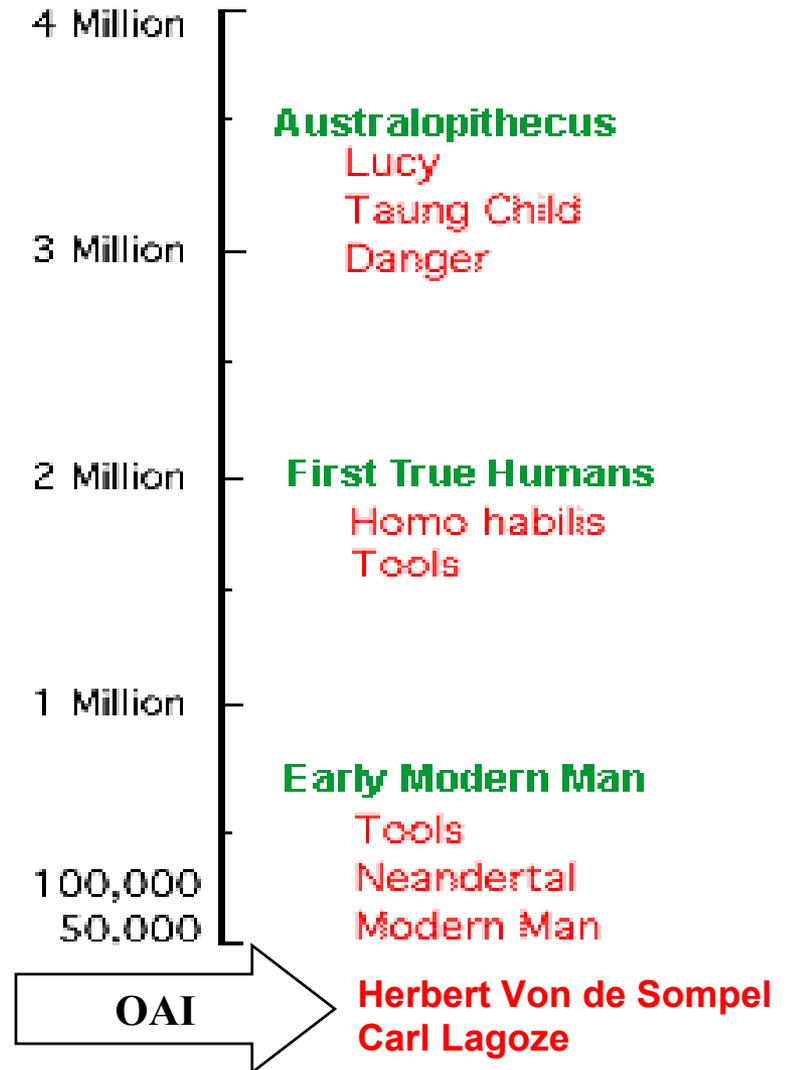
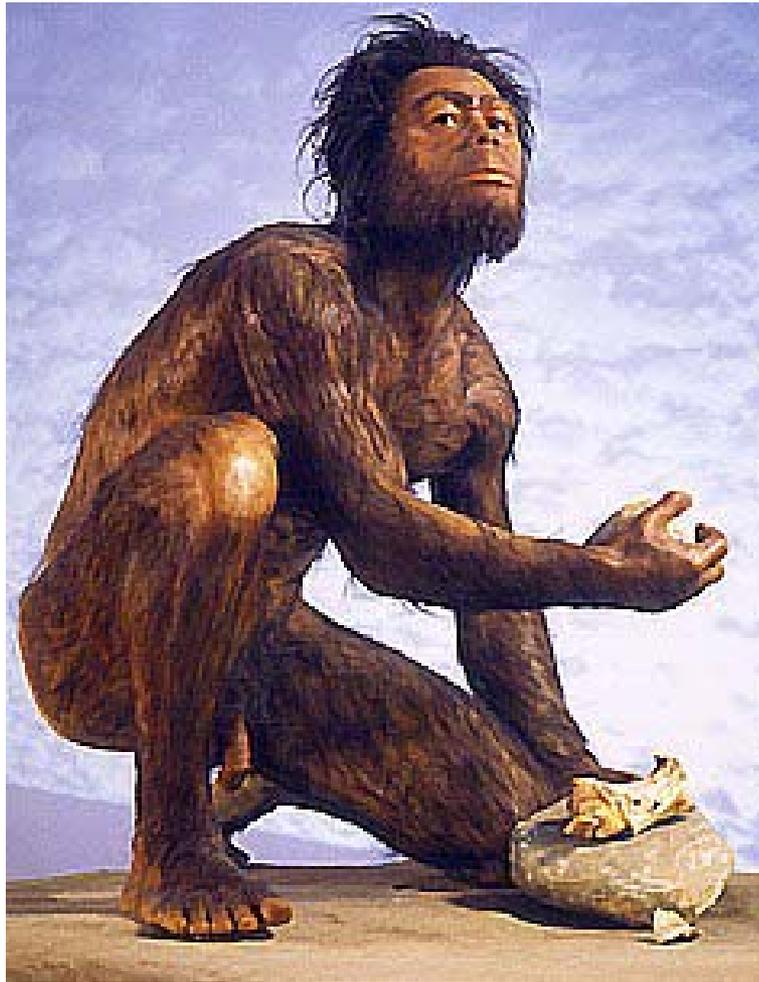
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# Take the Long View

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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**