Open Access in Its Next Phase: From Single Products to Marketplaces

By Sven Fund ✉ iD 🐦
Managing Director
Knowledge Unlatched and fullstopp

Open access (OA) is probably the most significant innovation of the past decades when it comes to business models in scholarly publishing. In less than two decades, it has rapidly moved from the idealistic periphery to a center stage position, and there is virtually no significant publisher left that does not offer OA as a key element of their publication strategy. The rise of the model has been accompanied by many experiments, first for journals, but more lately also for books and data. As a consequence, OA today comes in many flavors, from more simplistic models around article processing charges (APC), through memberships, to crowd funding by libraries from all over the world.

Funding initiatives and the funders' shifting strategies have undoubtedly played a pivotal role in the development of OA. Innovators such as the Wellcome Trust in the life sciences, the Andrew W. Mellon Foundation in the humanities and the arts, and players like the National Institutes of Health and the Max Planck Society have directed researchers receiving grants from them to support OA and hence removed an important barrier and emotional reservations thanks to generous funding. Most have taken a step-by-step approach, and virtually none have pushed for a "radical" approach—an important element of trust building in a system which at times has taken on the characteristics of a battleground.

As the most author-centric publishing model that (re-) combines the publishing decision and the funding requirement with the originator of the text, a metastasizing field of OA runs the risk of losing touch with the broad basis of its constituency—and actually it always has done so. Despite strong support from some academics and in some pockets of science (though less so in the social sciences and humanities), librarians and publishers have long been challenged to address issues such as copyright, intellectual property, quality, and pricing—for right or wrong.

Consequently, and in order to broaden its reach as a viable model, OA needs to strive for more consolidation at some point—and it needs to better communicate its benefits to the key stakeholders, these being researchers and authors.

Marketplaces

The OA development in journal publishing can be characterized in two phases. During first 10 years, startups of pure OA publishers like the Public Library of Science (PLoS) or Hindawi flourished alongside hybrid models, which combined subscriptions and APCs; Springer's acquisition of BioMedCentral (BMC) in 2008 marked an important step in the consolidation and maturing of the space. The field has seen a consolidation as yet unprecedented in academic publishing, whereby the top three players today control 50% of the market. In consequence, OA is one of the most consolidated sectors of academic publishing—and has failed in its original political promise of breaking the oligopoly of a few big publishers.

How could such consolidation progress so quickly? Journal publishing is largely in the hands of large conglomerates, and together with dominating, IT-based publishing models, major players in the field have found it easy to combine the attractiveness of their journal brands to authors (often supported by attractive Impact Factors) with strong administrative backbones supporting the collection of APCs—a task which libraries were not prepared for and have struggled to perform without support.

With the achievement of critical mass, publishers and libraries achieved a further step towards consolidation and invented "Read and Publish" models, combining the option for researchers to publish free of charge in journals which the library (often through consortia) was subscribing to. Hybrid publication models flourished and were much-liked by researchers, who did not have to change their publishing habits and could continue to submit papers to traditional, well-established journals.

Several weeks ago, a number of funders took action and announced they would no longer continue to fund hybrid journals but instead favor pure OA. Their "Plan S" will undoubtedly garner more support from additional funders who will be joining the declaration.

While OA for pure and hybrid journals has been successful in a highly consolidated space of academic publishing, it is obvious that this success cannot be repeated in other segments, be it OA initiatives of different kinds or in book publishing programs. The international book market is far more fragmented than the journal space, and books as products are way less standardized, despite a "journalization" that some publishers have been pushing for in recent years. Especially in the humanities and social sciences, long-format monographs remain dominant within intellectual discourse, and they are not likely to go away any time soon.

OA initiatives for monographs have flourished over the past few years, both for established publishers alongside their regular programs and also as startups focusing on just this one publication model. Various different approaches—Luminos' membership model, OpenEdition's freemium model, and Knowledge Unlatched's transaction-focused crowdfunding—have created a dense network of opportunities. And yet, in a market with a very high output and a variety of content types, they are still mostly seen as being experimental.

With relevant library contact being a critical component in supporting the transition of library spending from traditional, paywalled content to funding OA monograph publishing, marketplaces are moving evermore to the center stage. Early indicators from Knowledge Unlatched demonstrate that a combination of resources in approaching libraries is key to creating sustainable growth in the models. Strong supporters of OA on the library side tend to support multiple offerings and services to experiment with the flourishing variety of models.

This observation is clearly true for crowdfunding models, but it is also an option available through the newly launched model KU Open Funding, which tries to create an AirBnB-like service around book processing charges (BPCs)—which are only now being developed by some libraries.

Demonstrating Impact: The Case for Analytics

Scholarly publishing is still very much a legacy business resting on several transaction-orientated pillars such as standing orders to series, well-established collections, or editions that to some degree lose their economic impact in the

digital context. And in-depth interviews with academics indicate that feedback mechanisms between publishers and themselves often function on different levels. While citations are often recorded less systematically in the book disciplines than they are for journals, royalty statements help authors to estimate how widely their titles are being distributed. Together with direct qualitative feedback from colleagues and book reviews in relevant channels, researchers feel they can get a sense of the reception of their works.

In a digital environment, this traditional and somewhat qualitative approach can be supplemented by hard data. Researcher networks like Academia.edu and ResearchGate do a great job in demonstrating their impact on behalf of researchers through real-time analytics regarding the readers of the articles.

In OA, usage is and remains a dimension which is difficult to evaluate. While it is evident that usage is often the most striking argument when deciding in favor of an OA publication, traditional ways of measuring this usage are limited. There is empirical proof that the majority of usage of openly available content happens outside of libraries' IP ranges. But it is precisely this COUNTER compliant usage which librarians require in order to justify investments supporting the model beyond altruistic or "ideological" motives.

Additionally, many publishers and initiatives host their content on multiple platforms*—and let us not forget that Creative Commons Licenses allow for anybody to download and host content wherever they want.

It seems unrealistic to assume that the full corpus of scholarly publishing will be completely OA any time soon. In the present mixed-model environment, analytics could help all stakeholders—researchers, funders, publishers, and libraries—to make better economic decisions when choosing the best publication model. Publishers could shift their decision-making on which titles to make available OA from merely author-driven, or gut feeling, to a quantitative approach based on usage, but also on libraries' and/or funders' willingness to pay for open content.

In the decision-making process, benchmarking within a program—or beyond it, taking competitors' figures into account—is already a key question to many decision-makers in publishing, and it is very likely that demand for this type of data will increase further. To that end, and as OA develops rapidly, a neutral "OA usage data repository" filled on a regular basis by libraries, publishers, and platform providers would make sense

---

*   *Larger initiatives like Knowledge Unlatched host their content on more than 20 different platforms.*

and would help to avoid wasting financial resources in the transition from paywalled to open business models.

Early Career Researchers—A Special Challenge

OA is widely acknowledged as probably the most author-centric model in scholarly publishing, as it allows authors to control the exploitation of their rights alongside them funding the publication process. It simplifies academic publishing from a two-sided market to a one-sided model, with all the positive ramifications that brings. However, early career researchers with limited access to funding—both for their research itself and also for publications—are easily forgotten in the discussions around OA. While their interest in publishing OA is likely to be higher than for more experienced groups of researchers, they often simply cannot afford to do so. In order to further scale the model, funding structures need to be reviewed and adapted in order to avoid a new exclusion of certain groups of researchers from the active publication process.

Quo Vadis *Open Access?*

Well into its second decade now, OA is still developing at a high pace—and it has reached the potential to change academic publishing dramatically, for journals and for books as well as for commercial, university, and society publishing. As most players by now offer models that cater to the new realities in the market, OA seems to be approaching a new stage qualitatively speaking: After helping to open up large corpora of content, funders will now become more selective in their tactics, as already highlighted by Plan S and comparable initiatives. Their aim is to improve the "qualities" of OA, for example, by avoiding hybrid models. Publishers will need to adapt further, while not losing sight of economic considerations.

One core question remains: How will a mixed economy of different commercial and noncommercial funding models work, and how will it help to deliver the results which researchers and their funders are hoping for?

Call for Submissions

Are you a fan of *EON*? Do you have an idea for an article, column, or special section? *EON* is currently accepting submissions for our 2019 issues. Contact our editorial office today for more information.

LOCAL GROUPS

ISMTE Local Groups have formed through the efforts of members who would like to meet with peers and colleagues in their local area for networking and discussion. Participation is not limited to ISMTE members, and the only cost associated with participation will be your meal, if the group meets at a restaurant.

Active Groups:
- Australia
- Boston, MA
- Denver, CO
- Heidelberg, Germany
- Kathmandu, Nepal
- London, UK
- New York, NY

- North Carolina - Research Triangle Park
- Oxford, UK
- Pacific Coast, USA
- Rochester, NY
- Russia
- Tokyo, Japan
- Washington, DC

Visit the ISMTE Local Groups page to join a local group or to find more information.