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Variations on Open Access

A study of the impact of alternative business models on financial and non-financial aspects of scholarly journals

Preliminary results presented 9 May 2005, AIBS: Open Access Journal Publishing
by Kaufman-Wills Group, LLC

Study Objective

- To inform the Open Access discussion
 - Describe the alternative business models
 - Develop financial and non-financial profiles
 - Study a wide range of scholarly journals

Study Design

PHASE 1

- Four populations
 - HW delayed OA journals
 - Directory of Open Access Journals
 - AAMC journals (to come)
 - ALPSP member journals (to come)
- Written questionnaire
 - 38 questions
 - Emailed

PHASE 2

- Mixed population (preview)
 - Full OA, Delayed OA, and Optional OA and non-OA
 - For-profit and non-profit
 - Large, medium, small
 - Interviewers guide
- Personal interview
 - Discussion guide
 - 20+ interviews

Response

| Journal population | No. of journals | No. of respondents | Response rate % |
|---------------------------|------------------------|---------------------------|------------------------|
| Delayed OA | 184 | 85 | 46% |
| Full OA | 1,151 | 248 | 21.5% |

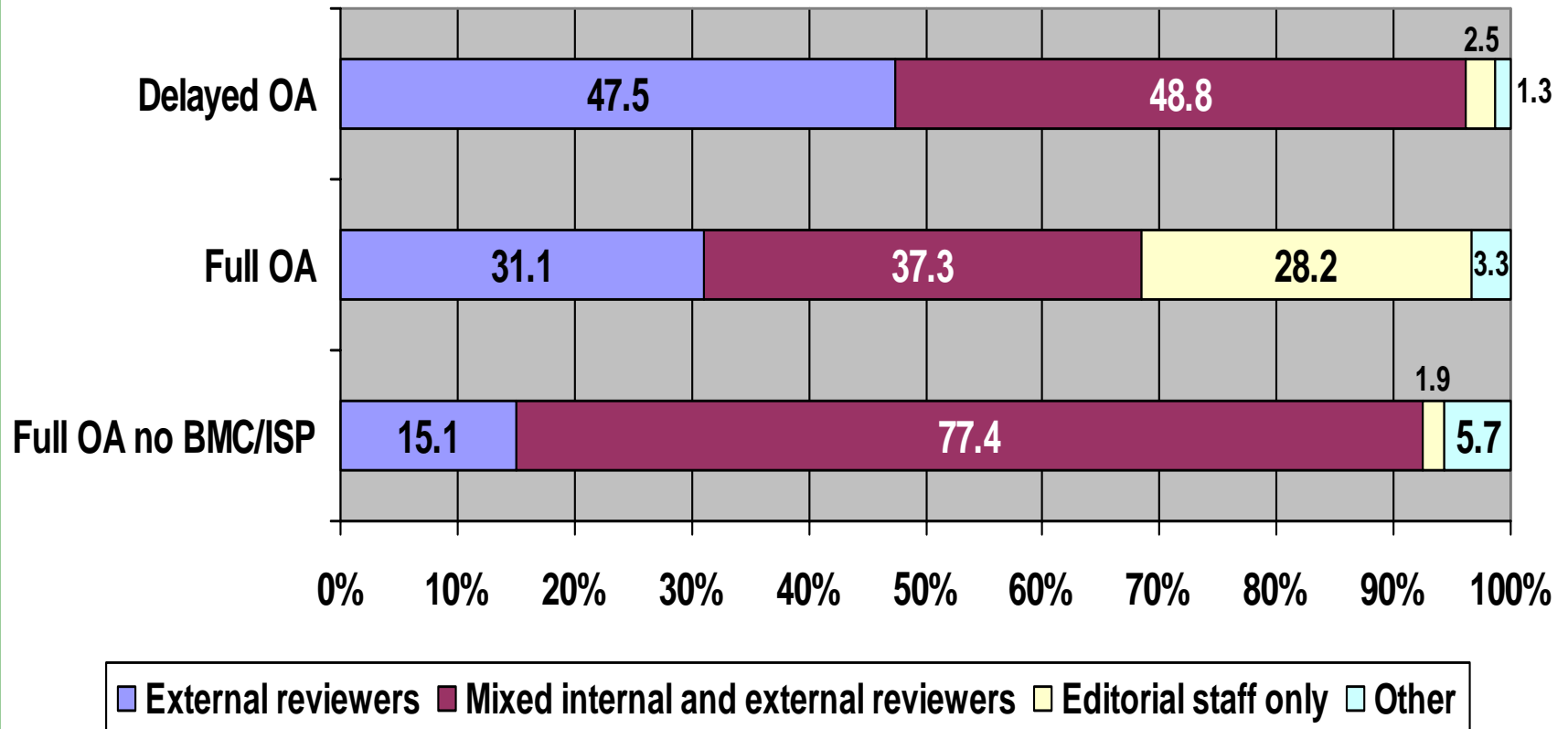
Areas of Focus

- Financial
 - Current and future access
 - Sources of financial support
 - % represented by each revenue type
 - Revenue trends
 - Surplus or deficit
- Non-financial
 - Journal profile
 - Type of journal, subject matter, publisher, format
 - Peer review
 - Copyediting
 - Author services
 - Copyright and pre- and post-publishing rights
 - Permissions policies

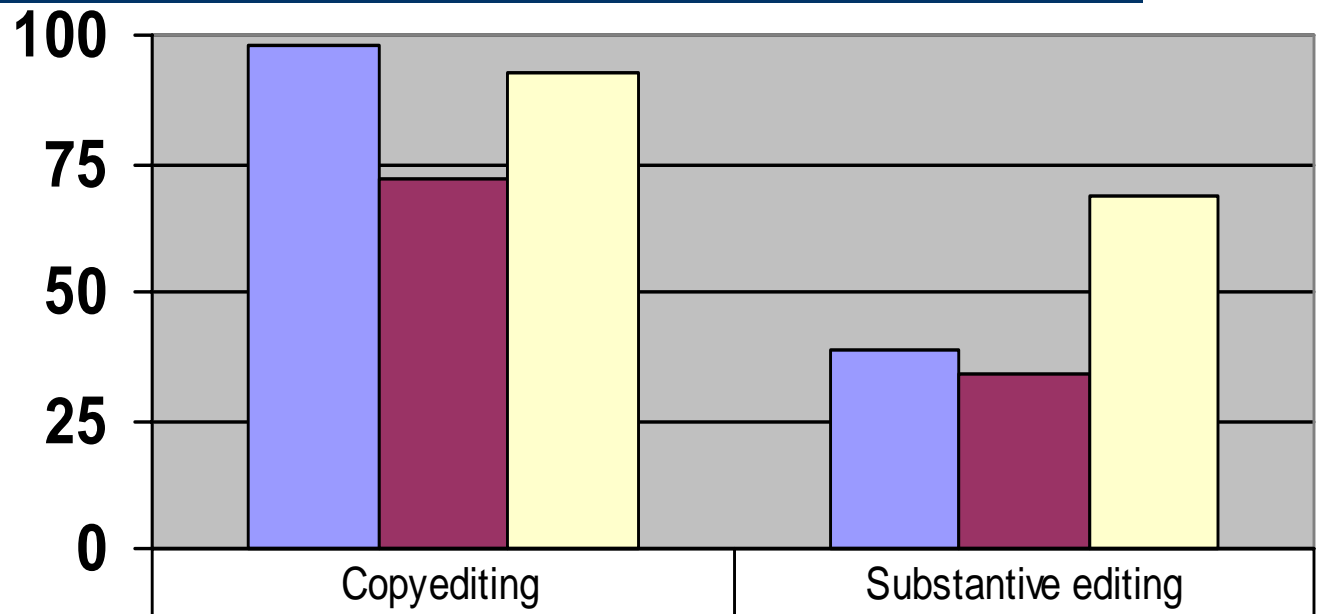
Journal Profiles

| | Delayed OA | Full OA |
|-----------------------------|-------------------------------|--|
| <i>Year first published</i> | 1966 | 1990 |
| <i>Publisher</i> | Not-for-profit | Comml, nonprofit, academic dept |
| <i>Location</i> | North America/UK/Europe | North America/UK/Europe |
| <i>Host-Archive</i> | HighWire, PMC, Ovid | Own service, PMC, Potsdam U, SCIELO, J-Stage, DOAJ |
| <i>Format</i> | Print and online | Online only |
| <i>Content</i> | Orig res, reviews, edls, news | Original research, reviews |
| <i>Subject matter</i> | STM | ST(M), soc sci, arts & humanities |
| <i>Acceptance %</i> | 38% | 64% |
| <i>Impact factor</i> | 3.67 | .9 (few ranked) |

Peer Review

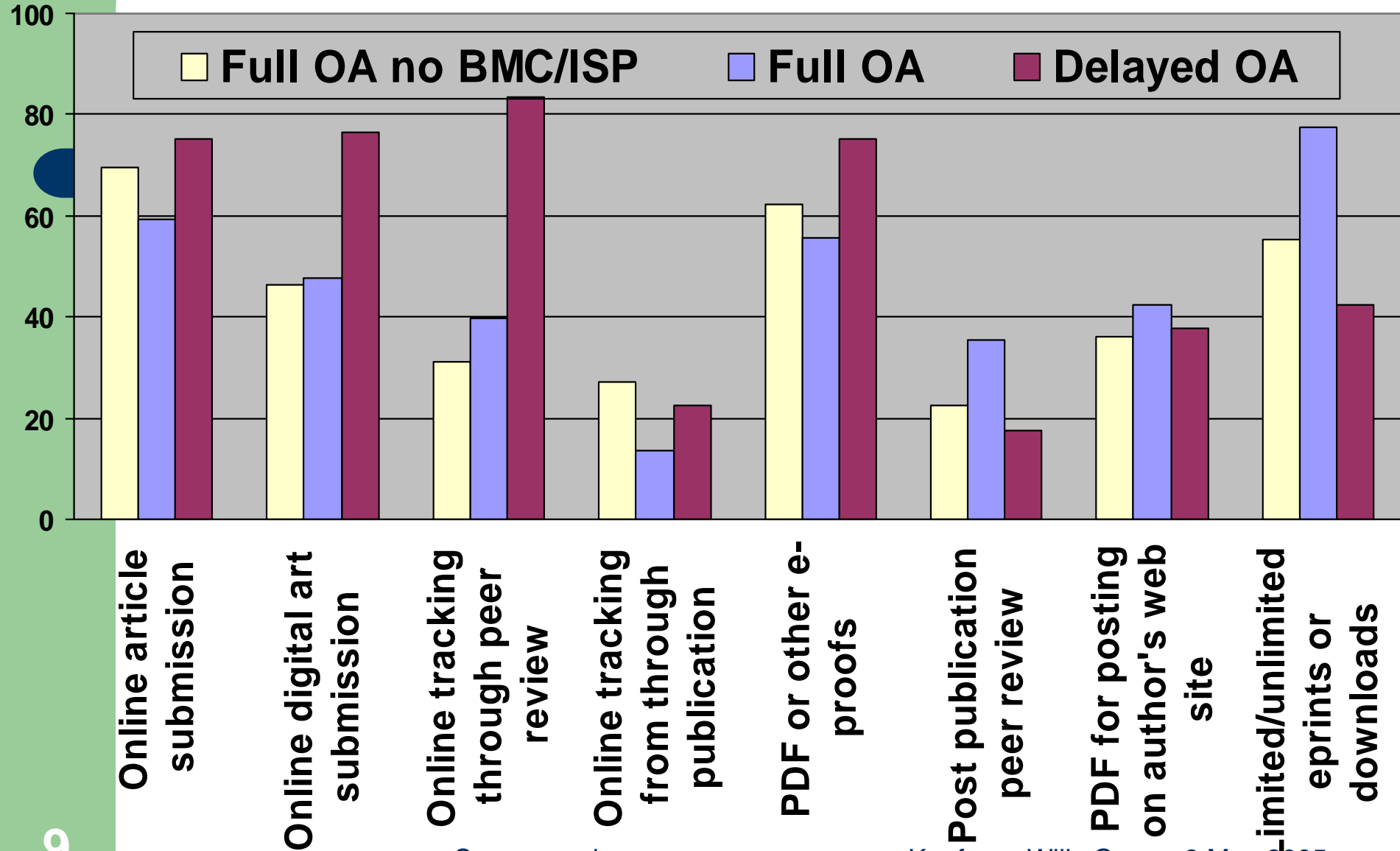


Editing and Copyediting



| | | |
|----------------------|----|----|
| ■ Delayed OA | 98 | 39 |
| ■ Full OA | 72 | 34 |
| ■ Full OA no BMC/ISP | 93 | 69 |

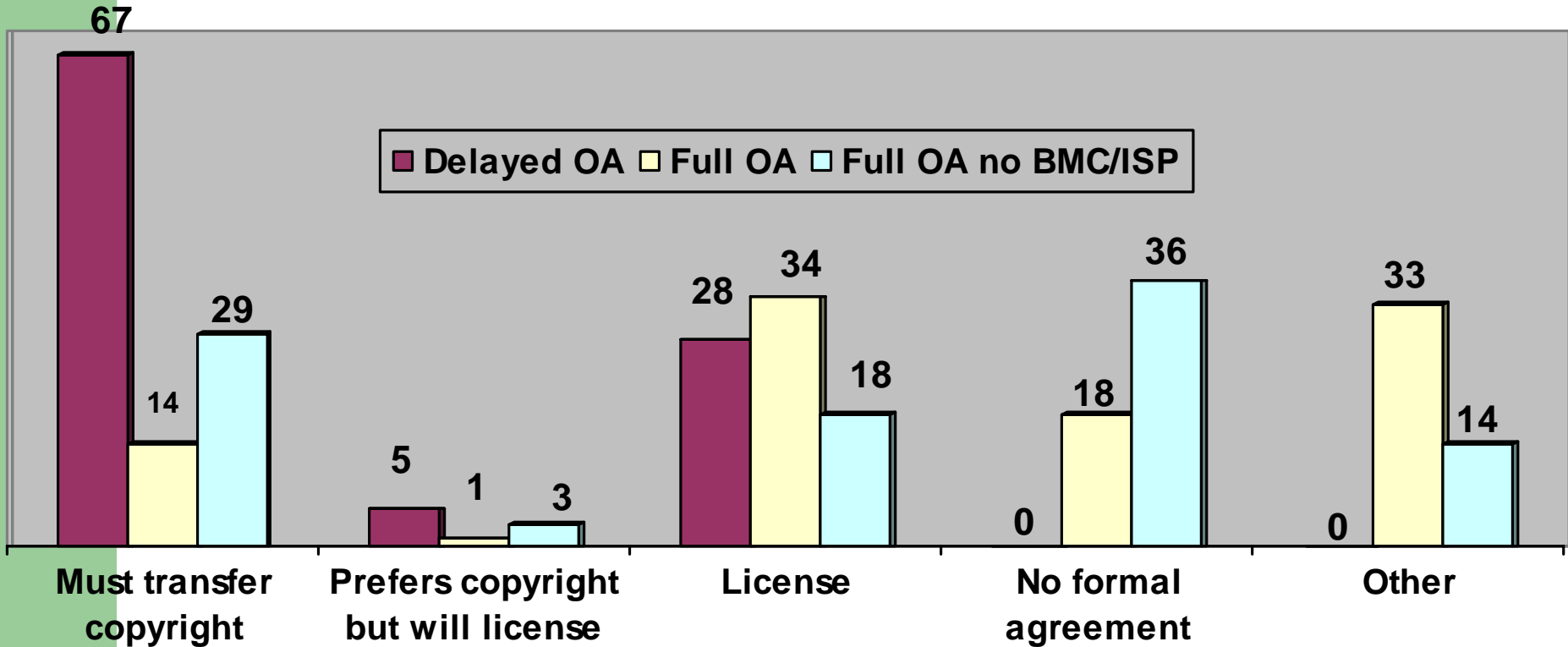
Author Services



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Kaufman-Wills Group, 9 May 2005

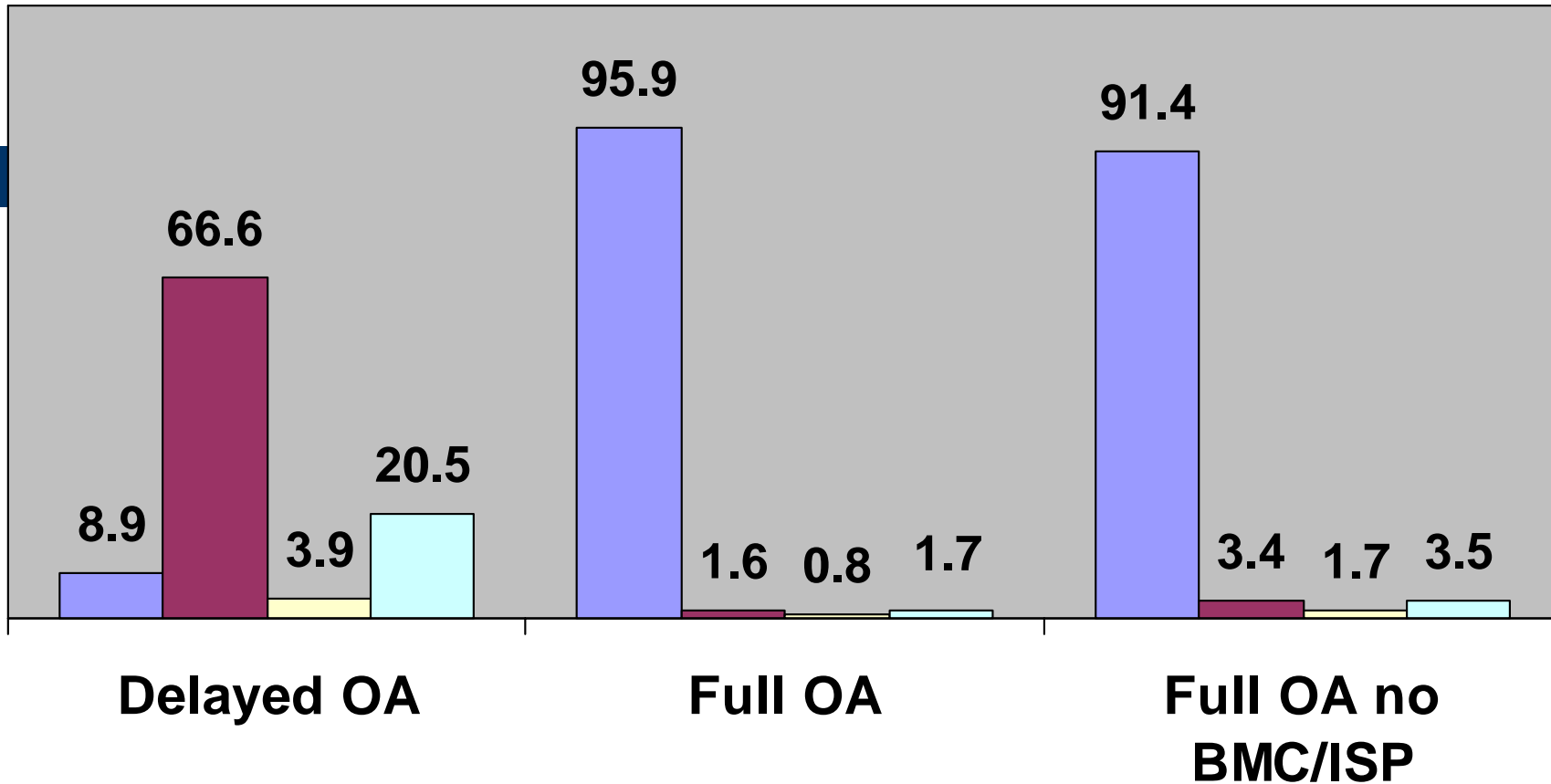
Copyright



Permissions Policies

| | Delayed OA | Full OA |
|--|------------|---------|
| Use granted only with written permission | 85% | 33% |
| Any academic use, but no commercial use without permission | 8% | 40% |
| Use granted in author's presentations or publications | 86% | 35% |
| Educational use in author's own institution | 51% | 33% |
| Placing post-print on author's web site | 45% | 31% |

Access Models



■ Access free upon publication ■ Access free after time period
■ Access via subscription ■ Other

Change in Plans

| | Delayed OA | Full OA |
|---------------------------------|-------------------------------------|-------------------------------------|
| Plan to test or adopt new model | 62% | 60% |
| Influential groups | OA proponents Members Authors | Publishers Authors Librarians |

Funding Sources (non-author-side)

Delayed OA

- End user
 - 87% subscriptions
 - 51% content licensing
 - 29% member dues
- Industry
 - 81% display ads
 - 66% comml reprints
 - 43% classified ads
- In-kind
 - 27% volunteer
 - 18% in-kind contributions
- Other
 - 34% PPV, supplements, translated editions, subsidies from other journals, back issue sales, institutional membership open access fees

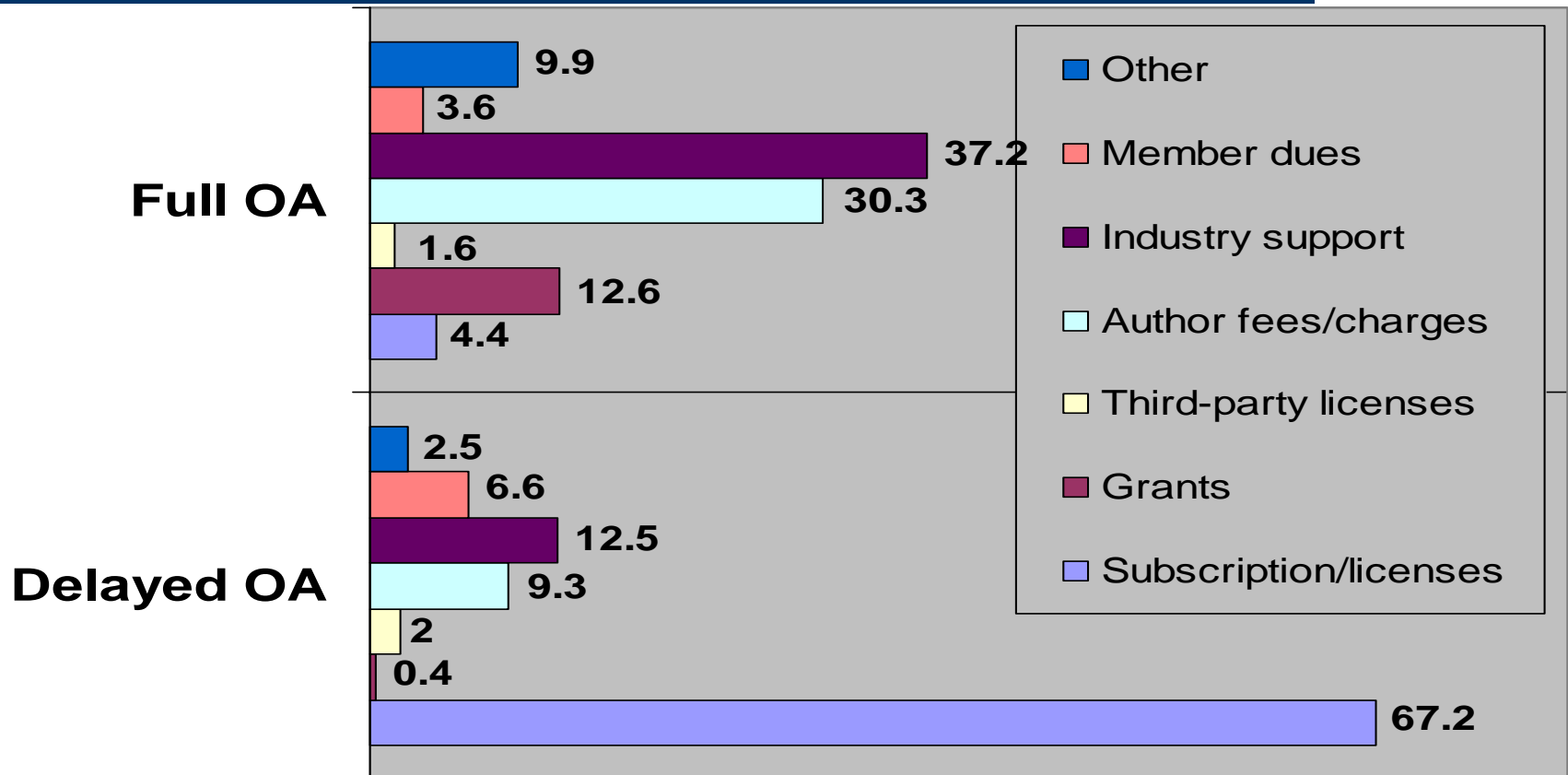
Full OA

- End user
 - 11% subscriptions
 - 30% content licensing
- Industry
 - 57% display ads
 - 31% corporate sponsorships
 - 27% commercial reprints
 - 27% classified advertising
- Grants
 - 56% gifts or fundraising
 - 11% external institutional grants
 - 11% private foundation
- In-kind
 - 56% volunteer
 - 40% in-kind contributions

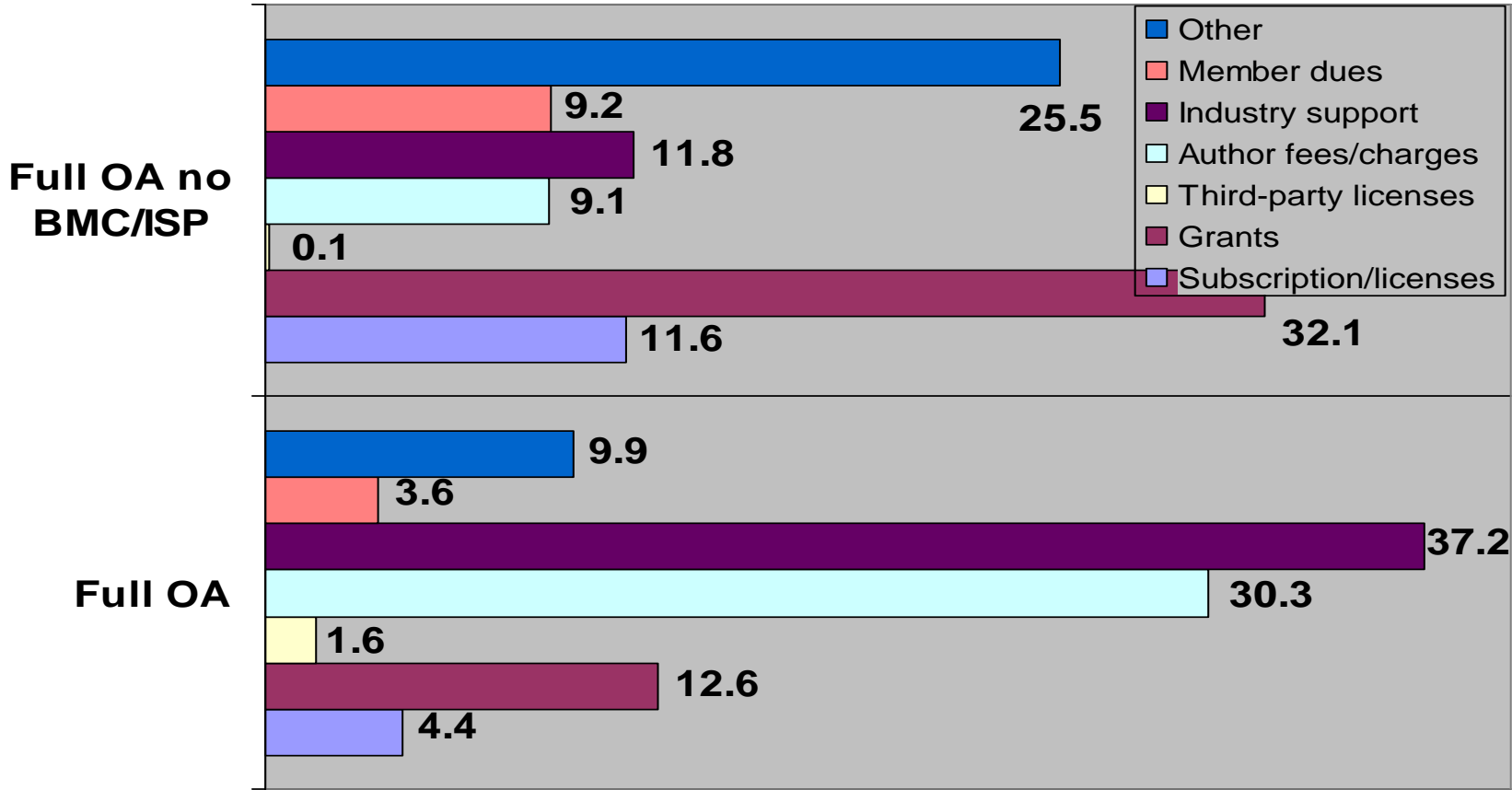
Author Fees

| | Delayed OA | Full OA |
|--|---------------|------------|
| Charge any type of author fee | 82% | 47% |
| <i>Of special note, from those charging author fees:</i> | | |
| Article reprints | 75% | 4% |
| Color | 68% | 4% |
| Page/publication | 39% | 1% |
| Manuscript submission | 24% | 25% |

All Revenue Sources as % of Total



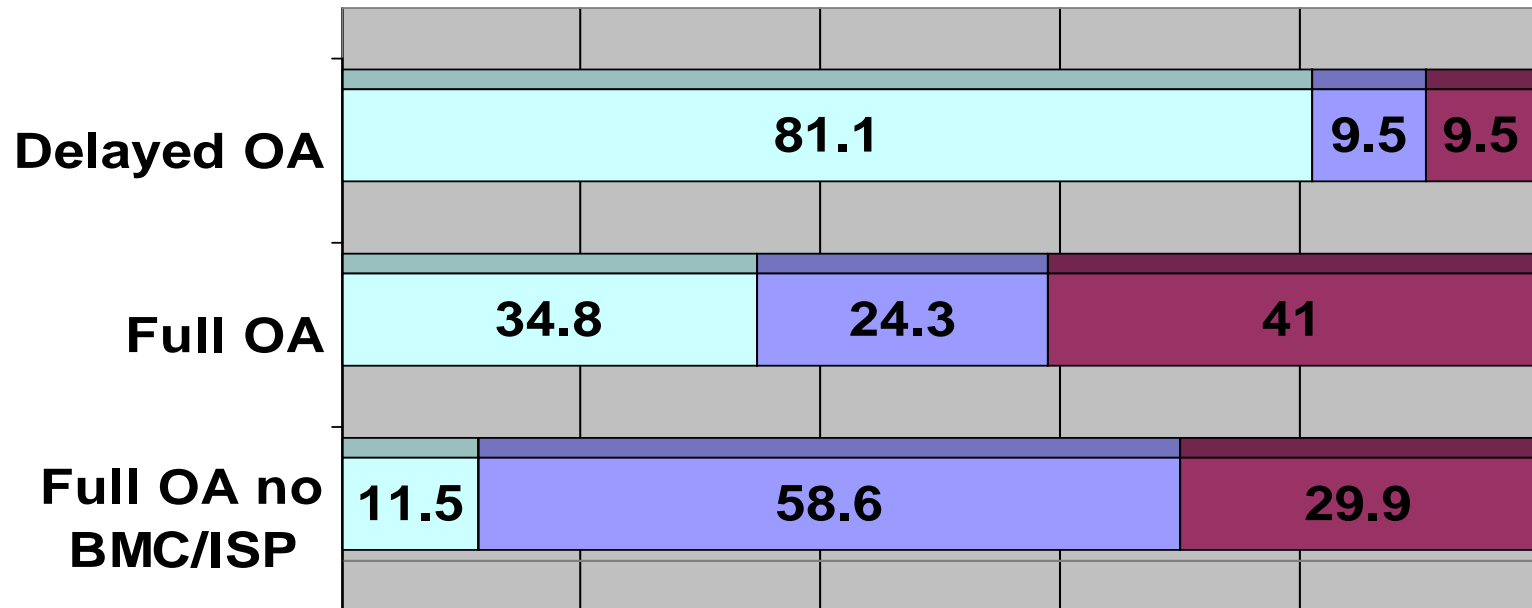
Revenue Sources as % of Total



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Financial Performance



Surplus Breakeven Deficit

Current Business Model Challenges

Delayed OA

- *“Loss of individual subscribers”*
- *“Acceptance of online journals by subscribers”*
- *“Increasing institutional subscriptions”*
- *“Decreases in print-based advertising”*
- *“Activating online subscriptions”*
- *“Inadequacy of existing web site”*

Full OA

- *“This is not a business, it’s an effort”*
- *“Seeking additional funding and donations when initial funding runs out”*
- *“Increasing usage”*
- *“Attracting adequate number of good papers and reviewers”*
- *“Lack of government support”*
- *“Workload”*
- *“Visibility, citations”*

Current Business Model Opportunities

Delayed OA

- *“Reach of journal via search engines”*
- *“International subscribers”*
- *“Opportunities to negotiate consortia licenses”*
- *“Generating support from association”*

Full OA

- *“Not sure what this means...we are a nonprofit enterprise”*
- *“Hope to continue to provide free access...to benefit society”*
- *“Full text free of charge available to all”*
- *“Hope to win more readership and listing in libraries and databases”*
- *“Help mankind acquire knowledge”*

Impact of OA Movement

Delayed OA

- *“Creates whole new dilemma for financing journals”*
- *“Very little NIH research published”*
- *“Potential devastating loss of revenue”*
- *“Inability of authors to pay”*

Full OA

- *“Validates what we have been trying to do...”*
- *“Puts pressure on others to make important information on scientific progress available to everyone”*
- *“Raises acceptability, helps hold down prices”*
- *“Increases international legitimacy”*

Will OA Journals Prevail?

Delayed OA

- *“Open access journals will only be prevalent and/or succeed if the financing issue is addressed and solved”*
- *“No, I doubt whether it will be successful due to financial issues”*
- *“Prevalent perhaps, but I don’t know if small association publishers can be successful without adding higher charges to authors”*

Will OA Journals Prevail?

Full OA

- *“Prevalent in some fields and may be mandated by nature of the funding of the research published”*
- *“I believe that it MAY become prevalent. So, I don’t want to miss the boat. Its success will depend on institutional and governmental policy”*
- *“Yes, yes, the model works”*
- *“Success will not be complete...most of the famous, high ranking journals will give restricted access...”*
- *Paid subscriptions are an “offensive contravention of the opportunities for freedom in knowledge exchange that the Internet should provide”*

Phase 2: Preview

- 22 personal interviews → case reports
 - HW open archive publishers
 - PLoS and other DOAJ publishers
 - Elsevier and other commercial publishers
 - University Press, other non-HW self-published society journals
1. Business models
 2. Operations
 3. Perspectives and predictions

Phase 2: Business Models

- Wide variety of business models
 - Type of model could not be matched with type of publisher
 - Every type of publisher is experimenting with OA, especially Optional OA
 - Varies greatly in terms of timing and cost
 - \$85-\$3,000/article
 - Low uptake (<1% for large commercial publisher; 5-25% reported by not-for-profit publishers)
 - Author pay-up high; 5-10% requesting waivers

Phase 2: Operations

- Impact of electronic publishing
 - Web-based manuscript management systems
 - Institutional subscriptions/licenses
 - Cost-cutting measures especially copyediting
- Impact of OA
 - Human resources
 - Endorse spirit of OA
 - Uncertain financial stability of journal

Phase 2: Perspectives and Predictions

- “Open Access” defined as...
 - Free access to content immediately upon publication
 - Expanded to include free re-distribution to all
 - Restricted to exclude commercial re-use
- Believe that OA in some form is here to stay
 - But will proliferate only if financial model proves viable
 - Because multiple funding bodies will mandate
 - Some publishers confident they can adapt; others fear collapse

Phase 2: Perspectives and Predictions

- Reasons for journals crisis
 - Increase in research funding → increase in research outputs → increase in journal size and/or quantity → increase in journal prices
 - Library budgets not keeping pace
 - Dual format more expensive
- OA publishers only slightly more likely to deconstruct traditional publishing process, both groups examining all aspects
 - Receiving manuscripts
 - Copyediting and production processes
 - Charging for publication or access

Q&A



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Selected clients

- AAAS/Science
 - Am Academy Pediatrics
 - Am Assoc Immunologists
 - Am Coll Cardiology
 - Am Coll Radiology
 - American Psychiatric Assoc
 - Am Soc Clin Oncology
 - ASPET
 - Company of Biologists
 - Rockefeller University Press
 - Intl Anesthesia Res Soc
 - NEJM
 - Project Hope/ *Health Affairs*
 - Am Acad Orthopaedic Surg
 - Am Urological Association
 - Am Speech Lang Hear Assoc
- Kaufman-Wills Group, 9 May 2005

Thank you

