

# Competition in the scholarly journal landscape in times of open access

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*Open is good, but not at any cost*

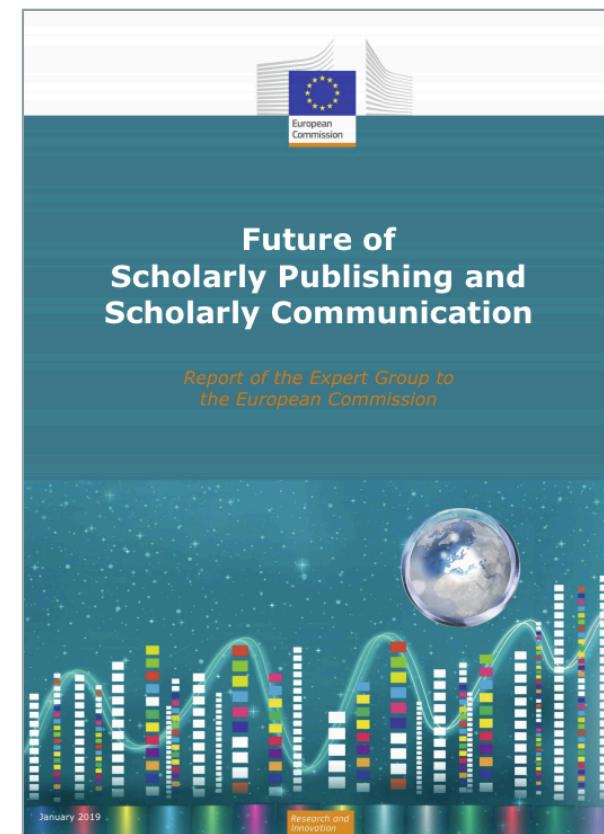


# *My background and perspective*



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- » Research has been focusing on how open access (OA) has been introduced and changed scholarly journal publishing.
- » Member of the strategy group coordinating open science policy development in Finland (2018-2020).
- » Member of the strategy group for journal publisher negotiations on behalf of the Finnish university library consortium (FinElib (2015-2019)).



<https://doi.org/10.2777/836532>

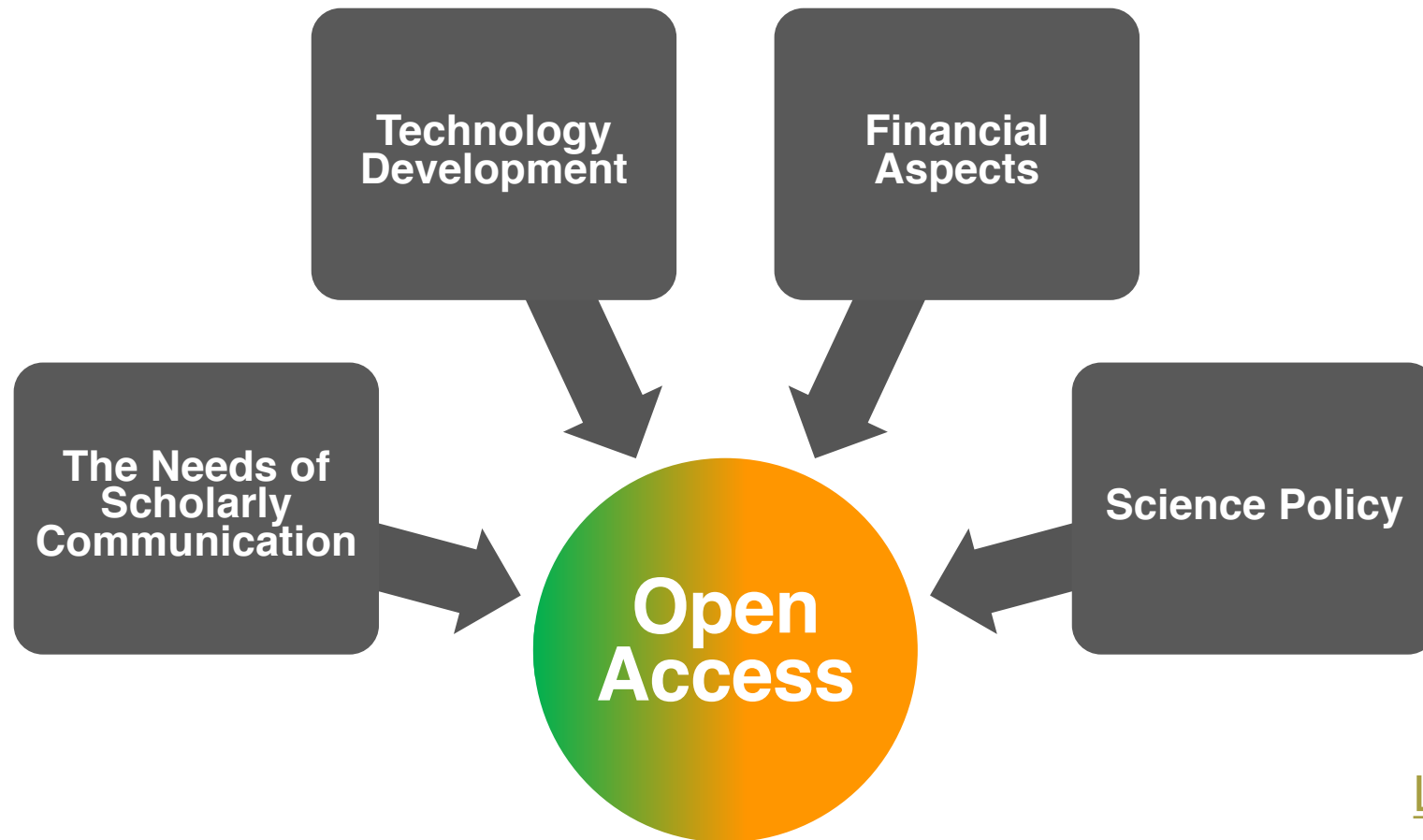


# *Agenda*



1. Why and how is scholarly journal publishing different than any other industry?
2. Open access as an extension of the serials crisis
3. A single organisation has many interfaces and interests towards the scholarly journal landscape
4. So, what direction to take based on all of this?

# *Open Access is constantly evolving*



Laakso (2014)

<http://hdl.handle.net/10138/45238>



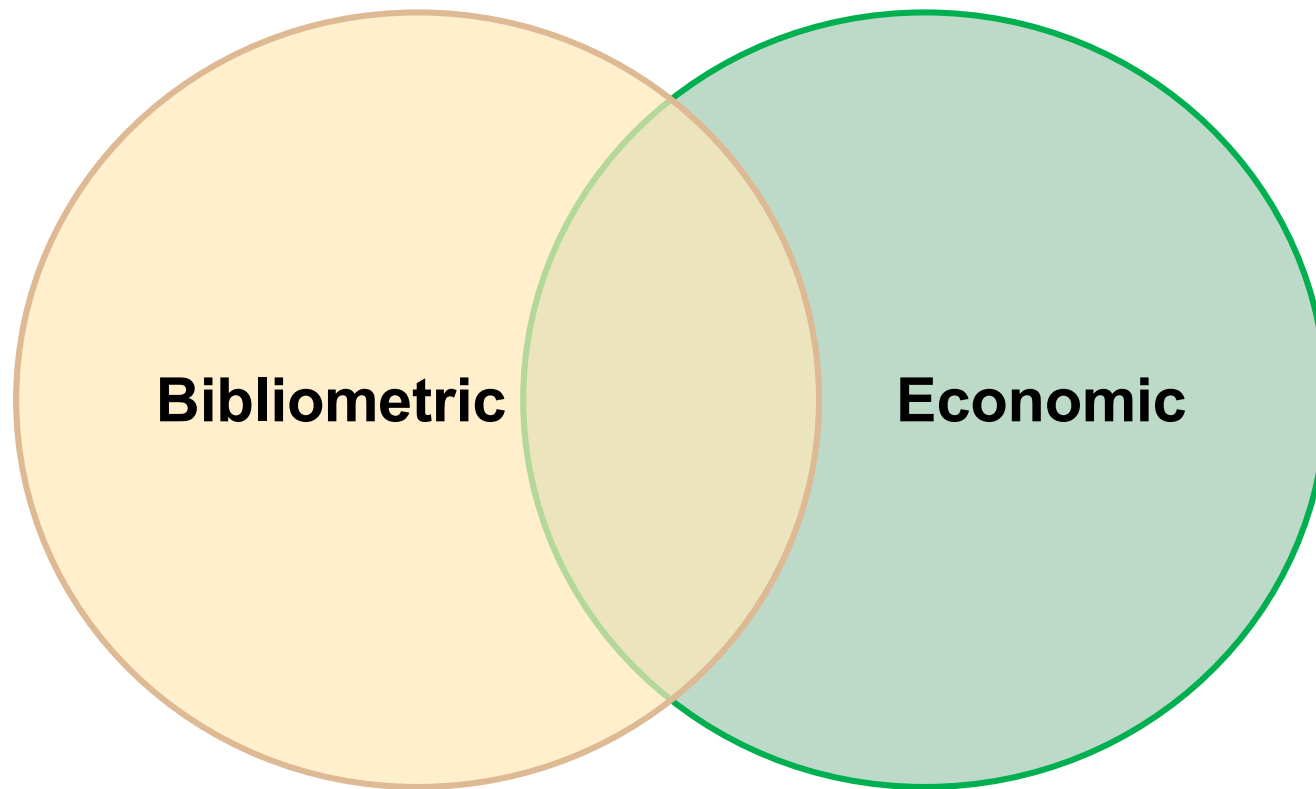
# *Focus of this talk*



- » The focus is primarily on:
  - » Full OA journals
  - » Hybrid OA journals/transformational agreements
  
- » This is not to diminish the utility or impact of green OA/self archiving in any way, but in the interest of time we'll save that for another day.

*1. Why and how is scholarly journal publishing different than any other industry?*

*Necessary components for understanding  
scholarly journal publishing*





*The five largest publishers publish around half of all scholarly journals*



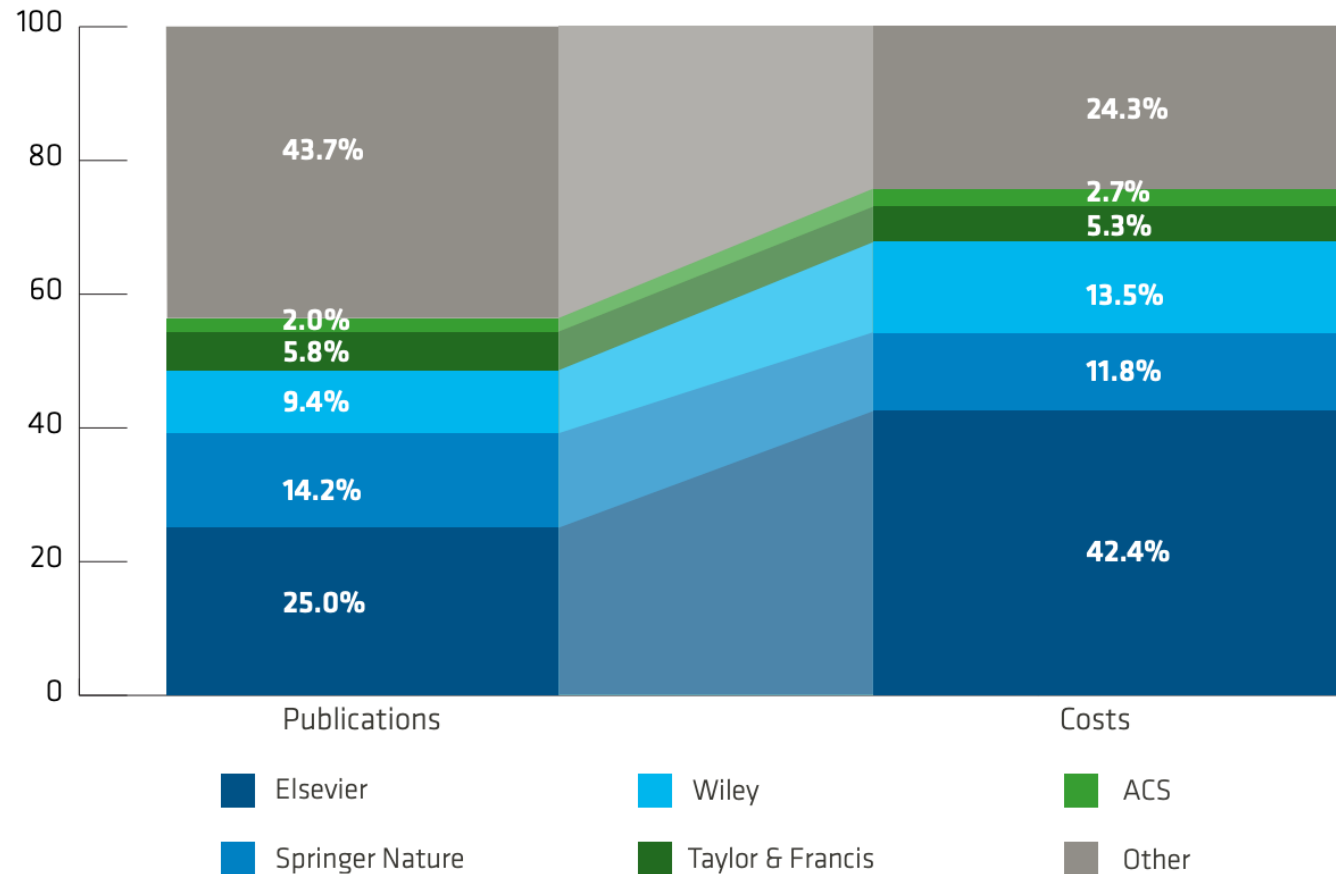
**SPRINGER NATURE**

**WILEY**



Currently  
1/5th of these  
journals are  
Open Access

# Large publishers account for an even larger share of the costs for libraries



<https://eua.eu/resources/publications/889:decrypting-the-big-deal-landscape.html>



# *Market control is not on the buyers' side*



- » Still mostly non-transparent pricing and contract terms.
- » Each journal (and thus publisher) essentially a monopoly. Both for reading and for publishing in.
- » Pricing extrapolated from historical spending.
- » De-synced international negotiation schedules.
- » Content supply disconnected from purchasing decisions.
- » Publication outlet rank deeply entangled in academic merit systems.
- » Decoupled buyer and primary end-consumer

*2. Open access as an extension of the  
serials crisis*

# Open + Money



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- » The issue of money has been intimately tied to OA from early on, yet there is only limited knowledge and experience about how to align the two.
- » Price and cost transparency is of benefit to everyone one else other than publishers who seek financial gain by not making such information readily available.
- » We need to gain added perception of **cost vs price**, thus making additional value added by providers more observable.



# *Open = less expensive?*

- » So far – **definitely no!**
- » Most of the 15 000+ open access journals active today are free to publish in, however, the problem is that most articles are published in those that do carry a fee (an APC).
- » There has been a persistent lack of one, or even a few, big and obvious “models” to bet on substantially. Scarce resources are now spread out too thin.



# *OA-focused journal publishers also show market aggregation*

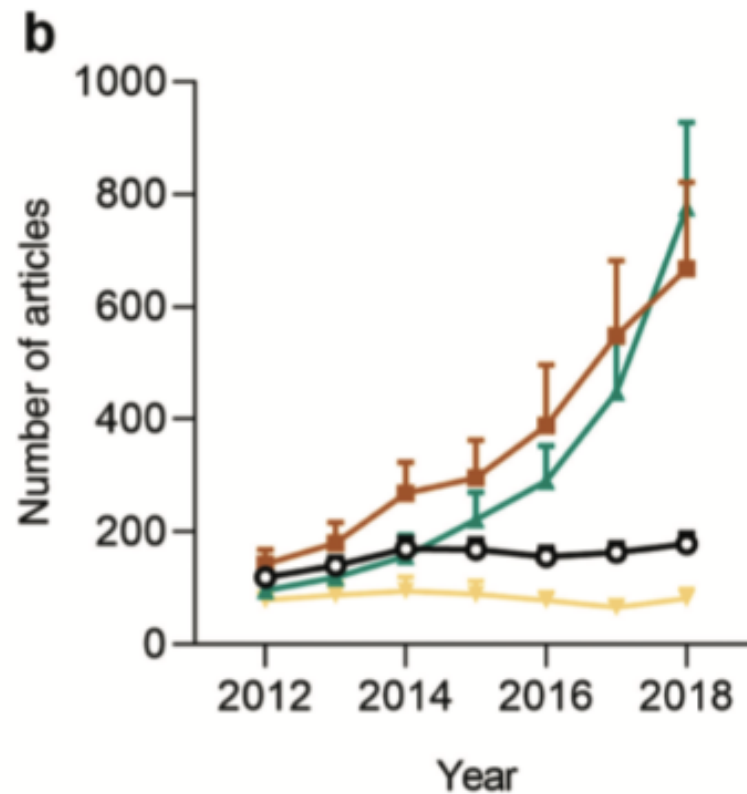
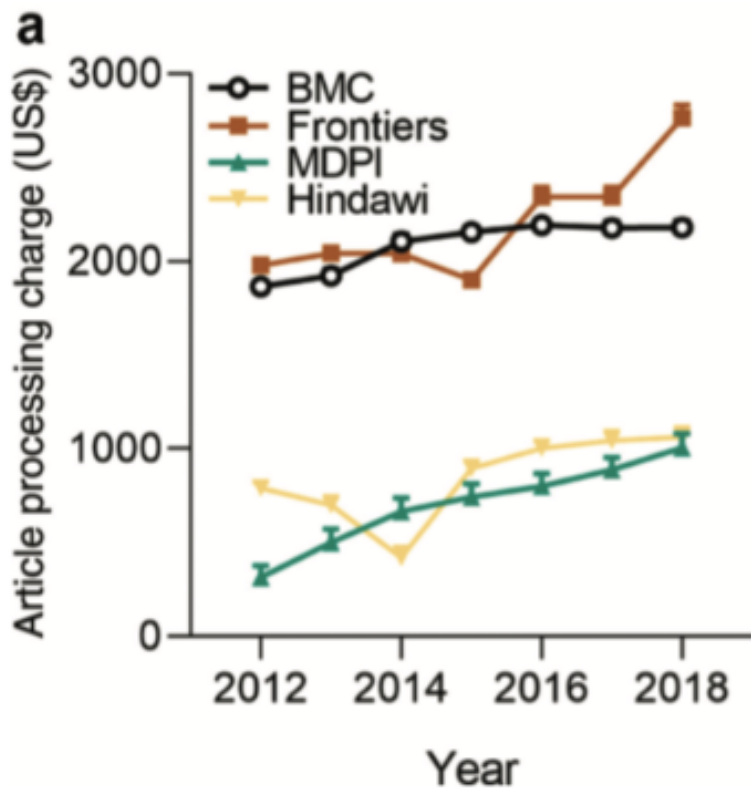


“The results reveal a fast-rising oligopoly, [.....]  
Commercial publishers clearly exercise control over the  
scope of journals and the creation of new titles, according  
to the interests of their companies, which are not  
necessarily the same as those of the scientific community  
or of society in general.”



Hindawi

*Prices of APC OA journals have increased as journals have become indexed and publication volumes have increased*



(Khoo 2019 <http://doi.org/10.18352/lq.10280>)





*How much would Elsevier need to charge for publishing all articles OA, assuming recent profit and revenue of the company?*



The results point at APCs that, on average, would be around 4173–4482 USD in order to preserve the publisher's profit margin.

(Copiello 2020 <https://www.mdpi.com/2304-6775/8/1/3>)



# *What does publishing actually cost? In what way does it matter?*



RESEARCH ARTICLE

## Current market rates for scholarly publishing services

”[...] we provide a granular, step-by-step calculation of the costs associated with publishing primary research articles, from submission, through peer-review, to publication, indexing and archiving.”

”The publication costs for a representative scholarly article today come to lie at around **US\$400.**”

(Grossman, Brembs 2021 <https://doi.org/10.12688/f1000research.27468.1>)

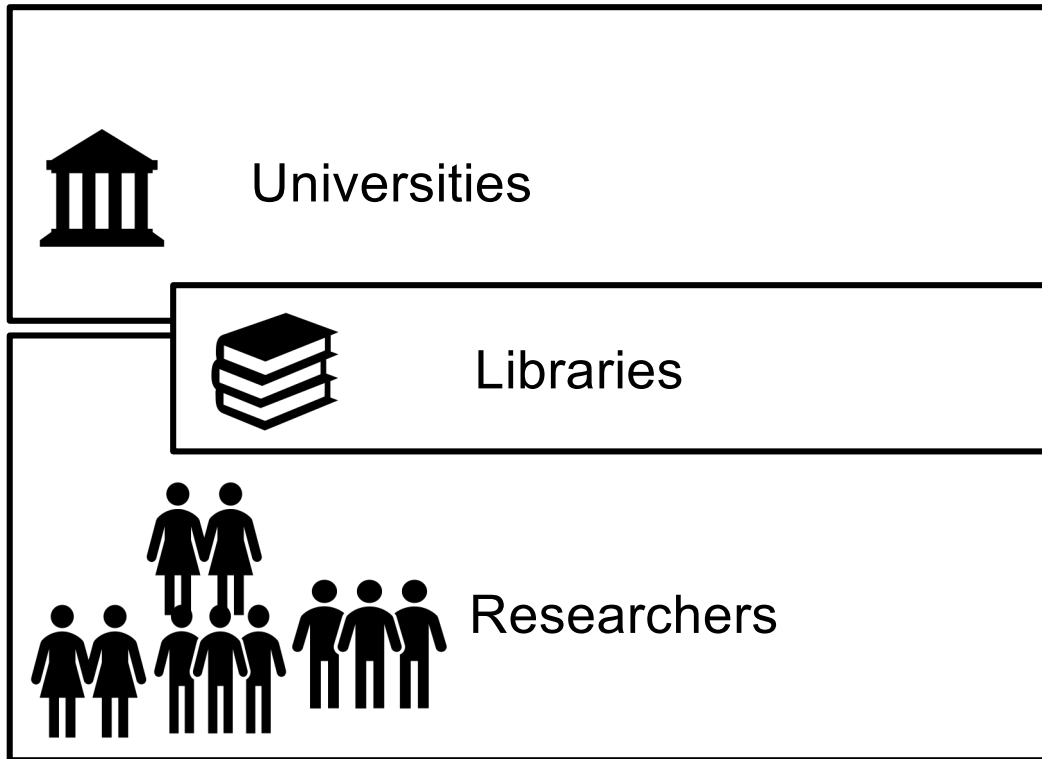
*3. A single organisation has many interfaces and interests towards the scholarly journal landscape*

# *Interrelated interests at many levels within the same organisation shape demand*



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\*not an exhaustive list



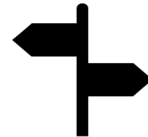
Secure funding  
Get competitive applicants  
Appear attractive in rankings and comparisons

## **How to best provide cost-efficient support for all of this, while facilitating Open Access?**

Conduct research and get it published  
Build collaboration networks  
Get positions  
Get grants  
Teach interesting and successful courses  
Have societal impact



Intern. Science Policy



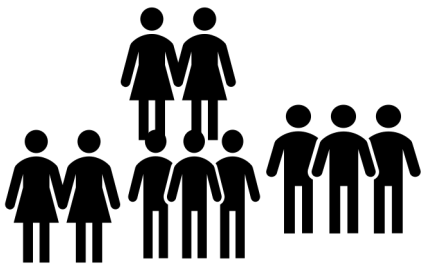
National Science Policy



Universities



Libraries



Researchers



Commercial Publishers

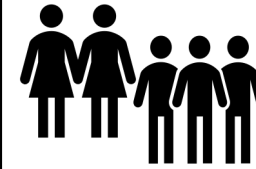


Research Funders



How to best grow Open Access by aligning individual and organisational goals and actions with science policy?

## *Researchers are in general risk averse when it comes to merit accumulation*



Researchers

- » Short-term employment with a strong "up-or-out" principle guides a lot of decision-making among researchers.
  - » (e.g. in Finland 70% of research and teaching staff is non-permanent).
- » Primary focus on established mechanisms and criteria for accumulating merit.
- » Only after that can one be more adventurous, if there is any energy or sanity left.
- » **The decisions, needs, and priorities of researchers are balancing between short- and long-term (primarily individual) interests.**



# *Aligning and mixing carrots and sticks*

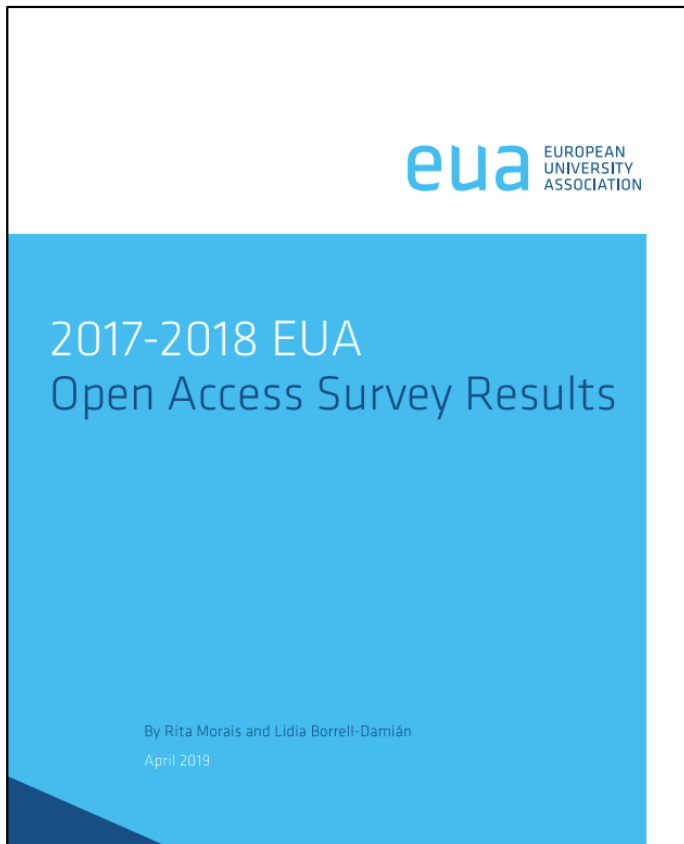


Let's have a look at some of these actors and try to identify various types of carrots and sticks at play....

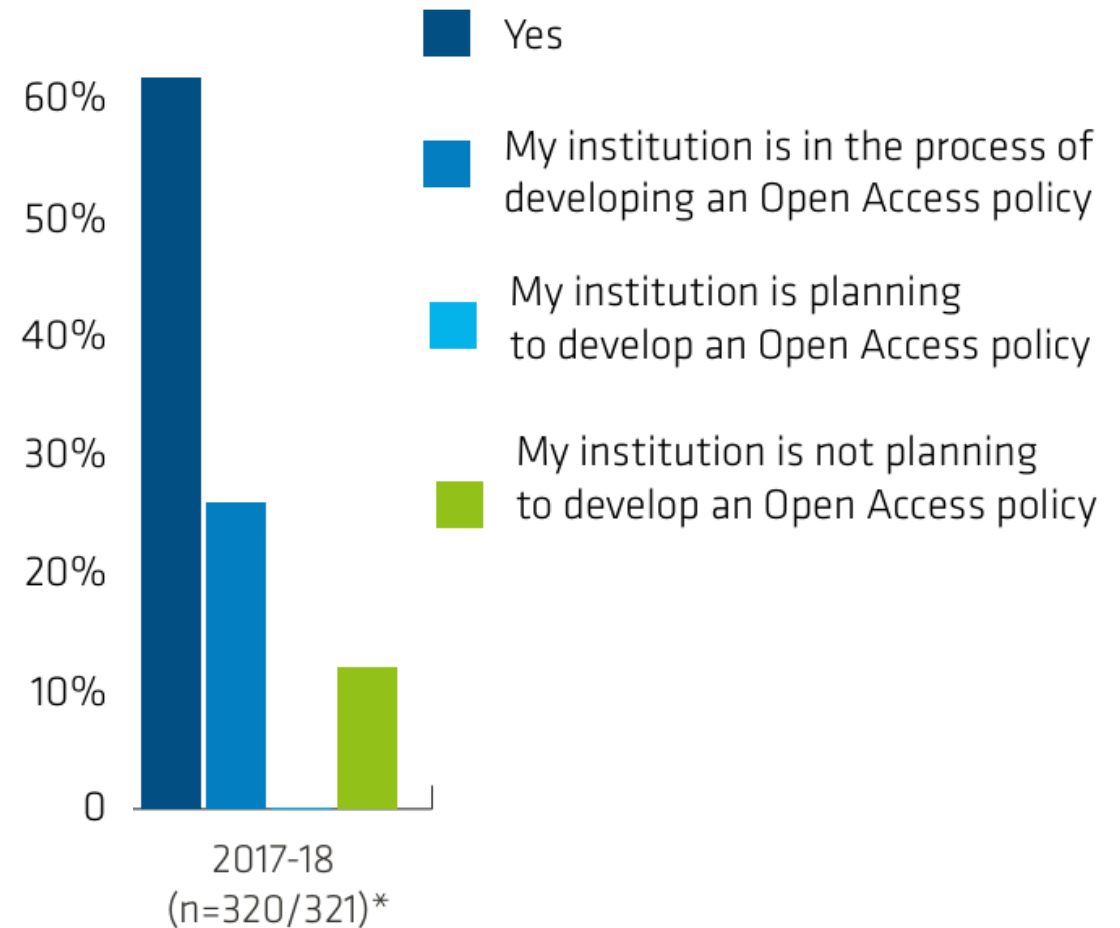
*The majority of European institutions already have an open access policy in place*



Universities



<https://eua.eu/resources/publications/826:2017-2018-eua-open-access-su>





## *A hard fact*



## Commercial Publishers

- » **Commercial companies**, particularly publicly traded, **are out to increase profits and seek growth.**
- » That is what makes shareholders happy and the leadership of the companies keep their jobs.
- » This growth can come from expanding business into new areas, or it can come from increasing market share and/or prices in existing segments.



<https://www.change.org/p/elsevier-boycott-elsevier-and-support-affordable-open-access-scholarly-publishing/sign>

*Many new startups in scholarly communications are acquired by commercial publishers*



## Commercial Publishers

Startup:	What they do:	Acquired by:	About:	From start to acquisition year:													
				07	08	09	10	11	12	13	14	15	16	17	18		
EasyBib	WRITING	Chegg	distributor/info services														
Colwiz (now Wizdom.ai)	PREPARATION/DISCOVERY/WRITING	Taylor & Francis	publisher														
GenomeCompiler	ANALYSIS	Twist Bioscience	biotech														
Plum Analytics	DISCOVERY/ASSESSMENT	EBSCO (Elsevier)	distributor/info services (publisher)														
Poetica	WRITING	Conde Nast	publisher														
ShareLatex	WRITING	Overleaf	workflow tool														
Manuscripts	WRITING	Atypon/Wiley	publisher														
Authorea	WRITING	Atypon/Wiley	publisher														
Sample of Science	DISCOVERY/ANALYSIS	fullstopp	publisher services														
HiveBench	ANALYSIS	Elsevier	publisher														

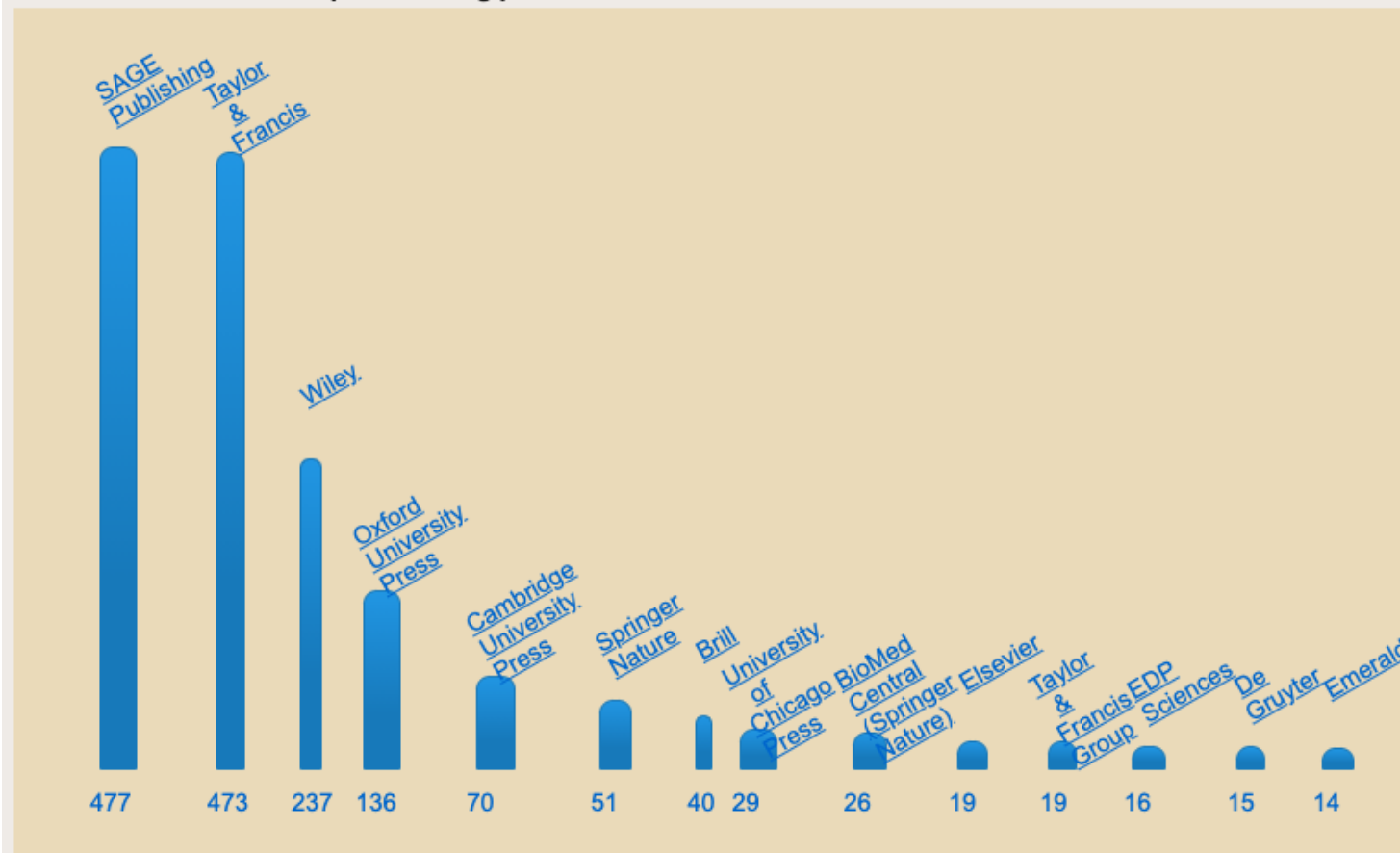
Campfens (2019) <https://doi.org/10.31219/osf.io/a78zj>

*...and the general trend concerning journals seems to continue*



Commercial Publishers

Number of transfer alerts per receiving publisher



INTERNATIONAL  
STANDARD  
SERIAL  
NUMBER

TRANSFER

<https://journaltransfer.issn.org/statistics>

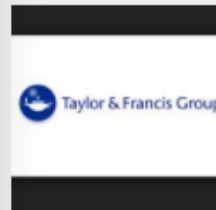
*Rather than converting journals, big publishers are adding OA journals*



Commercial Publishers

## Co-Action Publishing joins Taylor & Francis Group

Taylor & Francis Group are delighted to welcome Co-Action Publishing to join their growing open access portfolio for 2017.



### Taylor & Francis buys open access publisher Dove Medical

Published September 27, 2017 by Katherine Cowdrey

Academic publisher Taylor & Francis Group, part of Informa PLC, has acquired independent Open Access (OA) publisher Dove Medical Press for an undisclosed sum.

## Wiley Announces the Acquisition of Hindawi

*A Global Leader in Research and Education Accelerates its Strategy to Power the World's Knowledge Ecosystem by Acquiring a Fast-Growing Innovator in Open Access*

# Plan S



Research Funders



Obtaining attractive research funding (**carrot**) comes with the requirement of fulfilling requirements for Open Access of results (**stick**).

Provides incentives for journals to create compatible ways to publish.



*Will forecedd cost transparency  
help competition?*



Research Funders

## Plan S Price Transparency Frameworks: guidance & requirements

The [Guidance on the Implementation of Plan S](#) specifies that:

“ Where Plan S requirements apply, no later than 1 January 2020, cOAlition S, in partnership with publisher representatives and other stakeholders, will define the various services (e.g. triaging, peer review, editorial work, copy editing) publishers will be asked to price. This price transparency requirement will apply to all articles funded through transformative arrangements as well as those levied by Open Access journals and platforms. ”

<https://www.coalition-s.org/price-and-service-transparency-frameworks/>

*4. So, what direction to take based on  
all of this?*

# Is the only way to “win” not to play ?



**SPARC** @SPARC\_NA · Jan 5

Not the kind of news we wanted to see to open 2021...we need more competition in [#openaccess](#) journal market...not less.



Wiley Announces the Acquisition of Hindawi  
A Global Leader in Research and Education  
Accelerates its Strategy to Power the World's ...  
[newsroom.wiley.com](https://newsroom.wiley.com)

2

15

30



**Leslie Chan**  
@lesliekwchan

Replying to @SPARC\_NA

But framing scholarly communication in terms of "competition" and "market" is what got us into this situation. We need reframing.

5:05 PM · Jan 7, 2021 · Twitter Web App

4 Retweets 2 Quote Tweets 20 Likes

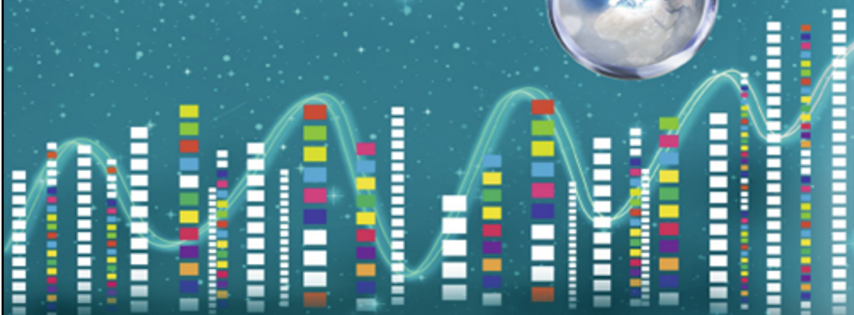
<https://twitter.com/lesliekwchan/status/1347197705014169601>





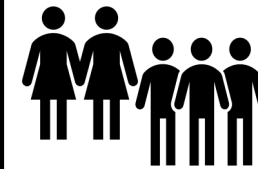
# Future of Scholarly Publishing and Scholarly Communication

*Report of the Expert Group to  
the European Commission*



January 2019

Research and  
Innovation



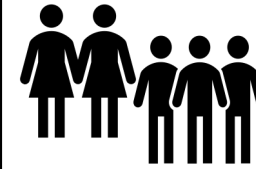
Researchers

“

...nothing will do more to foster change in accordance with the principles set out in this report than concerted work and institutional change in the area of rewards and incentives.

”

# *Alignment of reward systems*



Researchers

- » Without diversifying academic evaluation and merit systems change will be needlessly hard.
- » It does not look likely that major publishers will initiate wide-scale "flipping" of journals to open access, even in cases where hybrid OA uptake is rising.



*In what ways can libraries/universities fund open access publishing?*



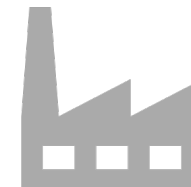
Libraries

## **A useful differentiation:**

» **Front end funding**  
(Supporting the system from the front)



» **Back end funding**  
(Supporting the system from the back)



# *The renaissance of university presses*



**HUP** HELSINKI  
UNIVERSITY  
PRESS

**LSE** THE LONDON SCHOOL  
OF ECONOMICS AND  
POLITICAL SCIENCE | Press

**Lund University Press**

WELCOME TO LUND UNIVERSITY PRESS – AN ACADEMIC  
PUBLISHER FOR THE 21ST CENTURY



**STOCKHOLM**  
UNIVERSITY PRESS

**UNIVERSITY OF WESTMINSTER  
PRESS**

**WHITE ROSE**  
UNIVERSITY PRESS  
Universities of Leeds, Sheffield & York

open access research in action

*University of*  
**HUDDERSFIELD**  
University of Huddersfield Press



Goldsmiths  
Press

**CARDIFF**  
UNIVERSITY  
PRIFYSGOL  
CAERDYDD

Cardiff University Press  
Gwasg Prifysgol Caerdydd

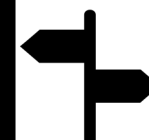


Edinburgh University Library  
**Open Journals**

Celebrating  
**500,000 downloads!**

**UCLPRESS**  
The UK's first fully open access university press

*Setting up regional portals is a good way to support OA*



National Science  
Policy

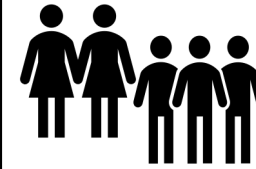


Scientific Electronic Library Online

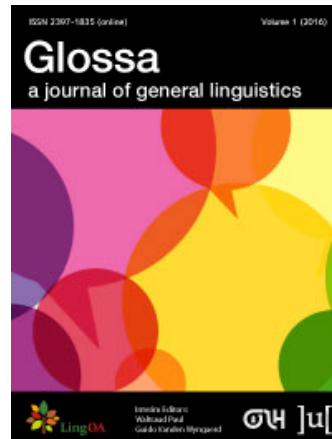


éruudit

*Encourage and provide funding mechanisms for editorial boards to transition to OA journals*



Researchers



It's ultimately the scholars that have the power for enabling change but coordinated effort is needed.

*Consortias are good.  
The larger, yet unified in goals, the better*



Libraries

couperin.org

Projekt DEAL

Bundesweite Lizenzierung von Angeboten großer Wissenschaftsverlage



FinELib



VSNU

vereniging van universiteiten  
association of universities  
THE NETHERLANDS

OA2020 – initiative for  
the large-scale transition  
to open access



ICOLC

International Coalition  
of Library Consortia





# *Unknown factors for competition in the future*



- » How transformative agreements
  - » shape publication preferences for researchers – from subscription lock-in to publishing lock-in?
  - » will influence the potential for libraries to invest in other OA channels
- » Is Europe creating an "OA bubble" that is hard to scale to be truly global?
- » If the future is based on APCs, how will equality of participation in research be managed?
- » How will the growth in preprints shape journal publishing and pricing?





## *Key takeaways*



- » The transition to open access calls for brave steps forward, not moving sideways and thus prolonging this unfavorable state of transition.
- » Drive for systematic change, which includes support for substitute alternatives to established outlets.
- » Commercial subscription-based publishers want to have their cake and eat it too, and commercial OA publishers are increasingly expensive to publish in.
- » Co-ordination is needed to make change happen, funders, universities and national consortia should collaborate to push towards the common goal of cost-sustainable open access.

*Merci!*

*Want to know more about this topic?*



What's the big deal? The economics of global Open Access, Mikael Laakso

Up next

AUTOPLAY



**Open Science MOOC**  
Published on Aug 1, 2019

<https://youtu.be/3rmbeWGgrWE>