Big deals and the transition to OA?

Liam Earney
Current Big Deals including hybrid OA

» De Gruyter
» Georg Thieme Verlag
» IOP (Institute of Physics) Publishing
» Royal Society of Chemistry
» SAGE Publishing (including the Royal Society of Medicine and the Institution of Mechanical Engineers)
» Springer
» Taylor & Francis
» Wiley
Reasons to be sceptical

Lessons from current efforts
» Emphasise the association of gold OA with the payment of APCs
» APCs tend to cost more than APCs in pure gold journals
» Higher cost of administration compared with pure gold and green OA
» Does one get what one has paid for?
» Ensuring that there has been no double-dipping
» Reinforces the status quo
"Article processing charges (APCs) and subscriptions - Monitoring open access costs" May 2016
Katie Shamash
https://www.jisc.ac.uk/reports/apcs-and-subscriptions
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Transparency
'Whereas every deal brings with it a triumphant set of press releases, public details on the financial mechanics of these deals are non-existent.'

‘confusion across the sector, leading some institutions to ignore the deals altogether and others to become increasingly frustrated with the management of the schemes’

‘There have been difficulties in collecting data which has meant that we have been more reliant on opinion than perhaps we might have liked to at the outset of the review.’

Professor Sir Robert Burgess

Cost allocation
Is Big Deal cost allocation sustainable?

» Assumes validity of status quo
  › Concentration on e-journals
  › Concentration on relatively small number of publishers
  › Concentration on subscriptions

» Allocation of costs between institutions
  › Historical Print Spend
  › Payment for Subscriptions vs Research output
  › Moving from national to international allocation
Recognising diversity
Does offsetting work for everyone?

» Institutions
  › Assumes institutions want to maintain Big Deals
  › Assumes institutions want to pursue hybrid Gold OA
  › Assumes all institutions have an interest in publishing research

» Publishers
  › Assumes uniformity of publishers
  › Assumes persistence of current ‘league table’
Reasons for pragmatic engagement?
Dealing with the world as it is

» Recognise the current primacy of the Big Deal
   › Growth in number of participants

» Acknowledge that subscription output continues to grow
   › OA output is not the only source of new content

» Recognise the popularity of hybrid OA
   › In UK c70% of OA is in hybrid journals

» Make use of existing efficient institutional and consortium relations
   › Accountability of central negotiation teams
Utilising existing relationships
Contributes to a transition to OA?
Evaluating offsetting agreements

» Contributes to a transition to OA?
» Are they affordable?
Evaluating offsetting agreements

» Contributes to a transition to OA?
» Are they affordable?
» Are they supporting efficient administration?
» Are they transparent?

» Is a Big Deal focussed on OA qualitatively better than a traditional one?
Addressing the issues
Implications for negotiations

» Redirect existing infrastructure
  › Support pure Gold, Green, infrastructure agreements
» Recognise that we are not tied into OA Big Deals
» Respond to the diversity of our stakeholders
» Include service level descriptors
  › Define expectations and penalties for all
» Conditions around use of funds
  › Transparency, pricing etc
Final thoughts
major failing of offsetting agreements lies in their assumption and continuation of the norms that govern the negotiation and implementation of existing big deals