



Towards a transition to open scholarship

Anna Vernon, Jisc Licensing

Jisc Licensing

Working centrally and in partnership with UK institutions

Efficiencies of scale, central data and expertise

Building agreements that reflect our members' needs and budgets - marrying diversity - institutions and our suppliers – need different approaches

165

HE institutions



300+

Agreements offered
each year



+£20m

Sector savings from OA
arrangements



90%+

FE and HE participation



Faster, fairer, and more cost-effective sharing of science/scholarship

Provide sustainable routes to OA available to all researchers regardless of institution, discipline or publication venue

Promote and support a healthy and diverse OA marketplace - diversity of languages, venues outputs, using common and open systems.

Challenge dominant suppliers to deliver greater value, and true commitment to a global and affordable OA transition

Strengthen the negotiation position of the consortium by continuing to develop robust negotiation strategies, viable and credible alternatives. Restoring the ability of institutions to develop their collections.

Deepening our understanding the market and impact of our negotiations so we can make the best possible interventions - costs + rate of transition

What impact has our approach had so far?

Circa 77% of UK research output now covered by a Jisc-negotiated transitional agreement or published in a fully gold OA journal.

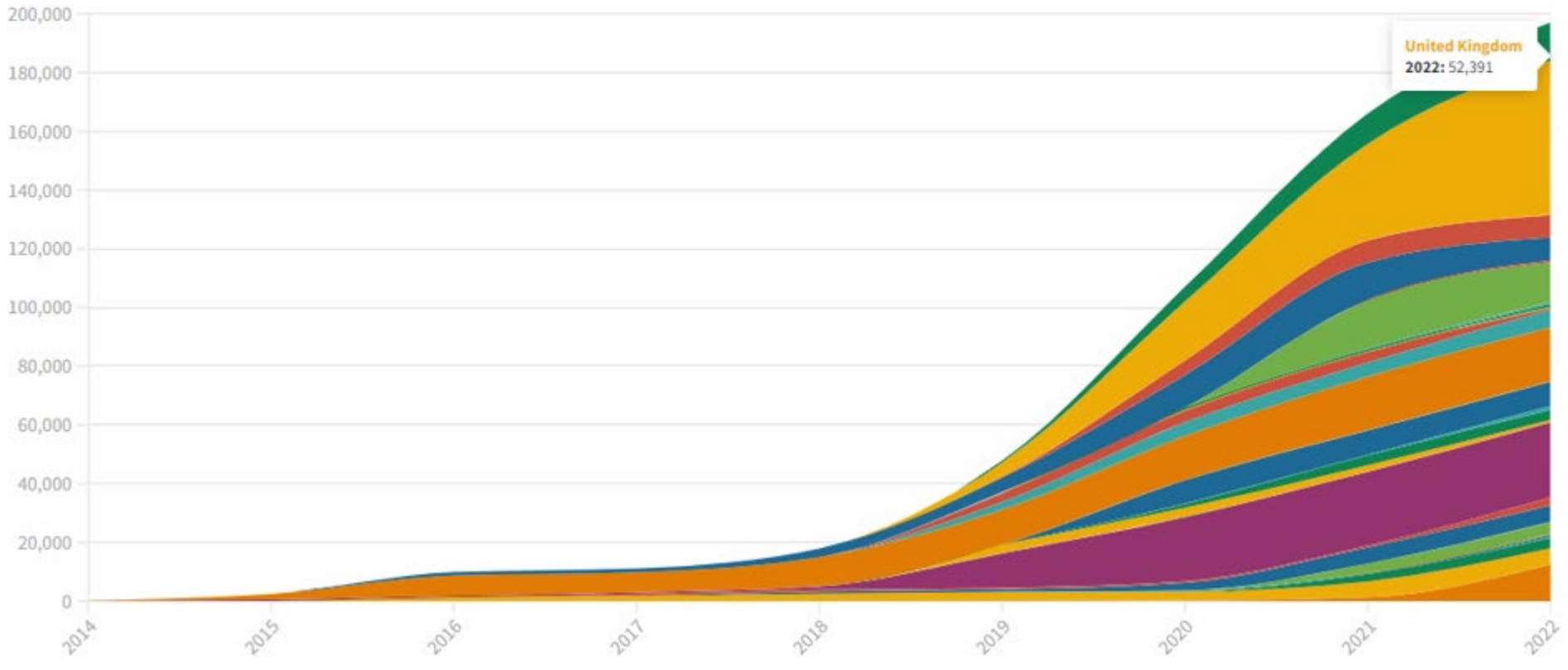
Aim: to scale up negotiations further so UK researchers have ubiquitous and frictionless routes to publish OA. Goal: 90% of UK output.

OA articles in TAs +58.5%
(2022 to 2021 - 12-month comparison)



What impact has our collective approach had

- Australia Austria Belgium Canada China Colombia Croatia Czech Republic Denmark EIFL (International) Estonia Finland
- France Germany Ghana Greece Hungary Ireland Israel Italy Japan Latvia Luxembourg Moldova Netherlands Norway
- Palestine Poland Qatar Saudi Arabia Serbia Slovenia South Korea Spain South Africa Sweden Switzerland Turkey
- United Kingdom United States



Articles per year

Supporting a variety of OA publishing options

Transitional OA models

Version of Record - immediate Open Access

Transitional Agreement (Read & Publish)

Converts subscription payments into funds for OA publishing

Transformative Journal

Commits to transition: achieving OA targets & offset subscriptions

Subscribe 2 Open + Green Route

Permits deposit of AAM on publication no embargo CC-BY

Green route

Subscriptions + Green route

Makes content OA if subscription commitments reach threshold

Open Access

Full OA + Community-based open access models

OACF Fully OA agreements

Thinking big + supporting small

Our Elsevier negotiations and extending our negotiation activity

Our member's requirements

(The most challenging negotiation objectives we've ever been set)

1. Support full and immediate access to research

All UK authors to publish immediate OA – all titles, all articles.

Guarantee permanent full text access to all content

2. Reduce and constrain costs

Open Access publishing must be met through subscription expenditure and not require new funds

Deliver reduction of 15% on contracted spend on subscriptions

Remove Article Processing Charges (APC) spend: e.g. £7.2million in 2020.

3. Build confidence that the charges for the next Elsevier agreement are fair and reasonable

4. Deliver full compliance with funder policies and improvements in service

Our strategy

Sector buy in

Value to all

Informed

Prepared

Sector buy- in: incorporating the sector voice

Consultation – two stage – agreeing principles and detailed/cost requirements to present unified voice – sought clarifications where there was divergent views/requirements

Charter with Library Directors – clarity on their role and their commitment to us / the sector in the negotiations

Communications – shared key messages mapped to key stakeholders with communications assets so that institutions could say in their own words why getting a better deal was so important whilst sticking to the core objectives

<https://www.lib.cam.ac.uk/stories/university-cambridge-and-elsevier>



Informed and value to all

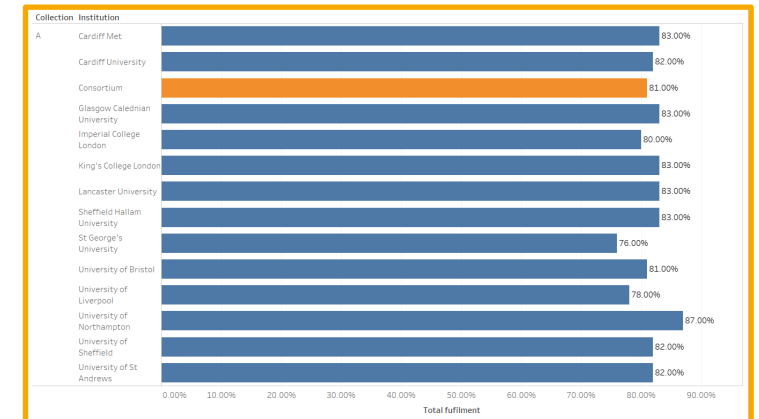
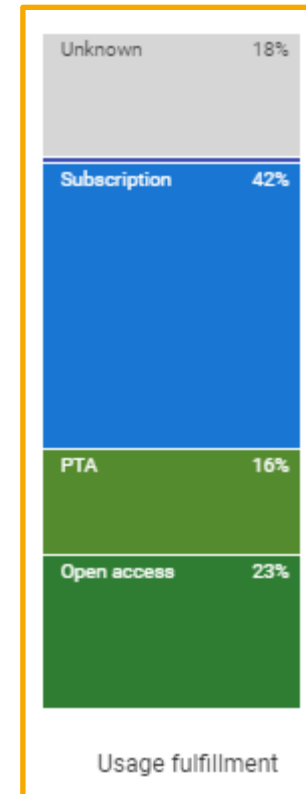
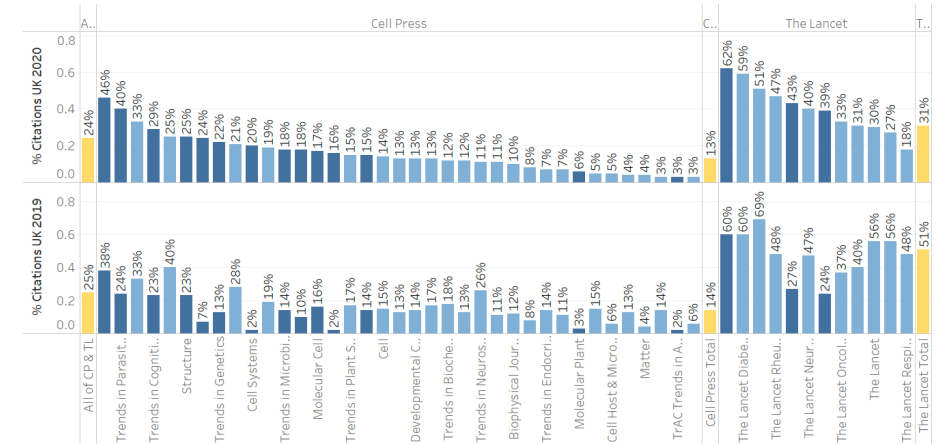
- Charter with our Library Directors
- Monthly briefings
- Jisc webinars
- Sessions with sector bodies and mission groups
- VC briefings
- Communications – blogs, assets, articles, websites

News and blogs

<p>BLOG</p> <p>Standing up for fairer publishing practices needn't hinder your career</p> <p>The 'cost of knowledge petition' takes a stand against the damaging practices of the world's largest for-profit publisher, Elsevier.</p>	<p>NEWS</p> <p>Jisc's response to Elsevier ScienceDirect negotiations statement</p> <p>"We support the sector's strong, unified rejection of the latest proposal from Elsevier and have requested a revised proposal."</p>	<p>BLOG</p> <p>Publishing research openly is not just a 'nice to have'</p> <p>Anne Mills, London School of Hygiene and Tropical Medicine, shares how the response to COVID-19 has demonstrated the huge value of open science, and how a united front is needed to accelerate the transition toward this new way of working.</p>
<p>BLOG</p> <p>Open access publishing should be the default</p> <p>Chris Banks, library director at Imperial College London reflects on the importance of a rapid shift toward full and immediate open access to research.</p>	<p>A time to choose</p> <p>For universities, the importance of transitional agreements with publishers goes far beyond price, says Jessica Gardner, university librarian at University of Cambridge.</p> <p>Read on uksg.org</p>	<p>How might we reduce our dependency on legacy publishers such as Elsevier?</p> <p>Professor Stephen Eglon from the University of Cambridge offers his perspective on the University's future relationship with the publishing industry.</p>

Prepared

- Data, data, data.....
- CorePlus
- Alternative access studies, templates, costs
- Consortiums of members (N8+)
- Unsub agreement
- Evidence based negotiations



Read and Publish Agreement 2022 – 2024 (+1 yr optional extension)

	2021 spend	2022 proposal	Reduction on 2021
Total Jisc contracted spend	£44,322,854	£37,674,426	-15%
Direct subscription spend	£1,103,915	£983,328	-15%
Total sector spend (subs + APCs spend)	£52,690,162	£38,612,754	-27%

- Read continuation of existing access to paywalled content, PCA rights
- Publish unlimited OA publishing in Elsevier subscription/core hybrid journals including Cell Press and The Lancet titles
- %increase -15% yr1, 1% yr 2, 2% yr 3

Fully OA Journals (2022-2023)

- 15% discount on APCs
- Cap on annual increase to APCs for titles 5 years and older
- 3 payment mechanisms

A

Rights retention

Need Elsevier to meaningfully engage in a broader discussion about author rights and for these rights to be exercisable in a meaningful way.

Workflow improvements

This agreement needs to deliver on the sector requirement of full and immediate OA and whilst there will be some exceptions, needs to be monitored and measures taken.

Transparency -

Agreed to work with the strategic groups to assist understanding of Elsevier's support for OA, set KPIs by which the Agreement's success (transparency, OA, workflows, cost constraint) shall be measured and monitored.

Moving Elsevier from historic model will be challenging and require global effort. They have not changed their underlying agreement charging structure from subscription model.

Why do UK institutions and authors want OA agreements with publishers?

Provides immediate open access – in 33 cases to the publisher's full portfolio at no cost to the author + administrative savings

Increased reach – usage, citation, altmetrics.

Guaranteed and automated funder compliance – seamless author experience with central application of CC-BY terms

Reduced expenditure including the removal of APC expenditure

Enhanced post cancellation access rights

Increased participation -132 (89%) of 148 Wiley Read and Publish subscribers published at least one OA article

Open access community framework

Supporting the transition to OA + greater diversity

Inspired by OACIP and OAex



Open Access eXchange (OAeX): an economic model and platform for fundraising open scholarship services

Authors: Jack Hyland , Alexander Kouker, Dmitri Zaitsev

Key benefits for publishers include:

- Predictable funding for a fixed period
- Increased awareness of journal / initiative
- Efficient way to reach Jisc community members
- Invoicing vis Jisc (optional)

Key benefits for institutions include:

- Defined funding request schedule for new OA initiatives
- Provision of standardized evaluation criteria responses
- Pricing allocated to Jisc bands
- Standardised participation agreement

This is not the end point

Building on our collective strength + post transition



**Putting institutions in the driving seat in setting what constitutes good value for publishing services -
Designing ideal state for post transitional agreements including defining what we need re transparency – costs and rate + commitment to OA transition**



Scaling up agreements, support for innovators, mission driven and non fee based OA see the OACF: [A new approach to supporting scholarly communications: announcing the open access community framework \(OACF\) | Jisc](#)



Challenge other major suppliers & mitigate the dominance and deepening integration and consolidation of suppliers

Thank you!

anna.vernon@jisc.ac.uk