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Stop, Look, Listen — Misleading Perceptions of the Open Access Book Market

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Prejudices live long and die hard. This is especially true in industries like academic publishing and librarianship, where things have not changed much until recently. What is surprising is the fact that even new business models and their developments are affected by the more traditional way to look at the world.

There is no doubt that the disciplines of science, technology, and medicine (STM) and the humanities and social sciences (HSS) have developed in quite different directions in recent decades. While publishing in the natural sciences is ever more journals-driven (and, in the near future, will most likely be data-driven, as well), scholars in HSS still create most of their research output in the form of books — about 60% in market volume, based on **Outsell** figures for 2015. It is fair to say that at least some of the dominant players in the publishing market have adapted their business models accordingly, and with quite some success. Hence, a stable system has been established, which means that making general statements about *the* academic publishing market is more difficult than ever before.

This is also true for more recent business models, such as open access (OA). Under this model, books are regarded as the format for the humanities and social sciences, while OA in STM is happening in journals. And indeed, an analysis of the Directory of Open Access Books (DOAB, see www.doabooks.org) supports this conventional wisdom. But the conclusion is still a false friend — and it is misleading when it comes to authors' actual interests and activities.

As open access develops, there is hardly any conference where presenters do not lament the fate of books under this business model, then quickly turn back to discussing the latest in journal article processing charges (APCs) — hence focusing mostly on STM. Books, it seems, are losing out — Why bother? It's only HSS. Certainly STM as a discipline is much less dependent on research monographs than HSS, as breakthrough research is mostly published in journals. And all the work done on peer review and speed of publication, as well as the reallocation of library budgets from subscription and transaction-based models to APCs, assumes the dominance of the journal article in STM and of the book in HSS.

Nevertheless, a closer look at the numbers raises serious doubts about the accuracy of that perception. It is true that the distribution of books across disciplines in DOAB confirms that about 65% of the titles registered by the end of June 2017 fall into HSS, while the remainder (35%) are STM titles, with titles from the health sciences representing the largest group. Based on over 9,300 titles from 216

publishers, everybody assumes that this is a statistically relevant sample of the market.

Yet that assessment is false. Quietly, but very effectively, InTechOpen (www.intechopen.com) has built up a list of over 3,000 OA titles — almost all of them in STM! InTechOpen is not a member of DOAB, and combining the titles of both the aggregator and the OA publisher completely changes the picture: 51% of the titles on the combined list have been published in STM, 49% in HSS.

Before we get into a discussion about the quality of individual publishers, my argument is not that anybody in the market is the new rising star in academic publishing. And I do appreciate that the type of books InTechOpen does — mainly collected volumes, not research monographs — is quite different from the publication program of other academic publishers. My core argument here is different: I am just interested in whether author demand for OA books has reached a level where they (or their institutions) are willing to pay for publications under the OA model. And the fact that there are many other small STM OA book publishers operating under a model comparable to InTechOpen further supports the point.

So it seems that the output covered by DOAB and InTechOpen speak very different languages. But why bother correcting the perception? Because the psychology and attitudes toward the product types in the respective sub-disciplines seem to blur our view of the facts. In times when library budgets are being reorganized away from traditional collection-building and toward supporting Open Access, prejudice and analytical mistakes can become self-fulfilling prophecies and lead to misallocations of funding.

Since InTechOpen commands 47% of all titles published in this aggregate analysis, it becomes obvious that other publishers have not sensed the researcher demand this newcomer is covering. This is surprising in a market environment where revenue development has been under pressure for quite a few years now, especially for books.

In contrast, a brief comparison of the number of books with that of articles registered by the Directory of Open Access Journals confirms that 70% of all the content indexed is STM, 30% HSS.

A Fresh Look at Academic Book Publishing

It seems that the time is ripe to revisit perceptions of the publishing market. When

we look at the numbers, there do not seem to be two separate segments with distinct developments for OA books — rather the opposite. And while one could argue that the share of OA as a percentage of the total book market is even lower than in the journals market, that assessment should not concern us too much. Since OA books are still a new market segment, the legacy of the overall industry structure should not impact future developments.

It is likely that major publishers will soon turn to OA books to push their sluggish book sales. And the observation of an evolving pattern in OA book publishing — also in STM — was reason enough for **Knowledge Unlatched (KU)**, www.knowledgeunlatched.org to question its historical strategy of completely abandoning STM in scaling its model. The approach of the KU initiative, which launched in 2012, was rather to focus on adding new categories — like journals — and initiatives such as **Language Science Press** (www.langsci-press.org).

But how can we approach the issue of expanding into STM? The conversations had with both publishers and librarians at conferences like **SSP** or in library meetings across Europe indicate that Open Access seems to be moving into a new phase. Disciplinary differences are obviously much less important in OA book publishing than we have assumed so far. That could very well be a consequence of the robust support major funders have given to flipping so much content from closed to open access. And it might also confirm librarians' assessments that journals alone will not do the trick in STM. On the contrary, market assessment makes it clear that there is a strong interest in OA books in STM, so it seems natural in our survey to expand the model further and reframe the discourse around open access books. In their latest OA books report, the market research company **SIMBA** forecast that funders' mandates in particular will give STM OA books a push — although it expects that the hard sciences will go down a different route than HSS did and still does. The report stipulates that book processing charges (BPCs) will be more important in STM than in HSS.

Funders now have an opportunity to help increase transparency in the open access landscape by avoiding the implementation of different, discipline-specific funding models. They will have to work with very different partners in both hemispheres of academic publishing. But if this is done in the right way, it will help them remain more independent in their choices,

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Being Earnest with Collections
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were not available. A breakdown of allocations and number of titles selected follows.

LSU Libraries Gap Analysis FY2017		
Discipline	Allocation	Number of Titles Selected
African American Studies	\$5,000	111
Art & Design	\$9,000	134
English	\$1,000	31
Film Studies	\$4,000	116
French	\$5,000	52
Foreign Languages & Literature	\$5,000	51
History	\$8,000	125
Music	\$8,000	78
Religious Studies	\$5,000	130

The project began in April 2016. This allowed the project lead to use the summer months to work with **Gobi** and obtain the peer-purchase lists. A librarian in collection development used the summer and fall to analyze the humanities' circulation and report five-year trends to liaisons. Even though **Gobi** lists and circulation analyses were conducted for all of humanities, the initial focus of the project was only one discipline, art & design. After art & design proved to be successful, the other areas of humanities were folded into the project. Project allocations and instructions were sent to liaisons in the fall. During the fall and spring, liaisons evaluated all of their information and made selections. The deadline for the liaisons to put titles in the project's **Gobi** folders was March 1, 2017. Acquisitions completed all orders by mid-April with a shipping timeframe of May 2017. From concept to completion, the gap-analysis took thirteen months.

Is it Essential to the Collection?

Selecting titles for the humanities gap-analysis project shifted the mindset of selectors and provided a slightly different purpose in decision-making. Instead of usage data or evidence-based data, liaisons used their expertise and the expertise of other librarians at peer-institutions for purchasing decisions. At **LSU Libraries**, the liaisons curate and maintain collections with a focus

on supporting the overall research and curricular needs of the campus and strategizing to develop a long-lasting comprehensive collection reflecting the long-term value of university investments. The gap-analysis was an additional pathway to continue the

meaningful and systematic development of the humanities' collections.

Liaisons framed their choices with the following two questions: (1) If **LSU Libraries** doesn't have this title in the collection, is the collection sub-standard? and (2) What is the most effective way to improve the collection with a small pool of money? Liaisons appreciated the chance to address collection weaknesses and wanted to make the best use of their unexpected opportunity. Some liaisons focused on call number ranges or areas where little systematic title selection had occurred on a regular basis. Other liaisons made title selections based on their knowledge of their departments' curriculum and research needs, interdisciplinary interests, and book reviews or spotlight lists.

Resources for Liaisons	
Gobi Peer-Purchased Title Lists	Circulation Analysis Reports
Faculty Suggestions	ILL "Essential" Title Requests
Curriculum Maps	Faculty Profiles
Choice Reviews	Gobi Spotlight Lists
Knowledge of Publisher	Areas of Collection Specialization

Weeks before the launch of the gap-analysis, all liaisons completed curriculum maps, which guided decision making and allowed liaisons to identify departmental or programmatic priorities. The curriculum maps included valuable information for decisions such as degree programs offered and course summaries. When creating the curriculum maps, liaisons also profiled individual faculty members taking note of specific research interests, publications, and teaching loads.

In addition, liaisons were able to use in-house interlibrary loan title lists as decision-making tools. **LSU Libraries'** customized interlibrary loan request form includes a drop down menu for faculty to indicate whether the requested title should be purchased — is it essential to the collection? Monthly ILL reports of title requests marked by faculty as "essential to the collection" are provided to liaisons for purchasing decisions. Also, liaisons were encouraged to seek faculty input and to set up meetings within the colleges or with individual faculty. As with many academic libraries, faculty suggestions have a higher priority and they can offer justification for specialized or esoteric resources. Most of the liaisons did receive title requests and input from the faculty.

Project Challenges

Some may wonder why **LSU Libraries** used **Gobi** to produce such extensive spreadsheets of peer purchases that ultimately proved cumbersome to liaisons trying to grasp the large amounts of data provided to them. Collection development librarians did look into different title analysis tools such as **OCLC's** WorldShare Analytics Evaluation, **Green-Glass**, or **Bowker's** Book Analysis System, but at **LSU Libraries**, justification for operations typically boils down to cost — there was not enough money.

Most of the liaisons work in public services, and the gap-analysis started too late in the fall and coincided with periods of heavy student and faculty needs. Most of the liaisons did not receive their allocations or instructions until November or December. The six liaisons and the one staff member overseeing acquisitions considered the project highly time-consuming and labor-intensive because workflow was condensed into January and February with a March 1, 2017 deadline to submit title selections.

Some liaisons began reviewing their **Gobi** lists in November 2016, but lists contained between 5,000 and 6,000 titles; liaisons needed more time for review and selection. Liaisons were unable to work on the gap-analysis project every day and the difficulty of ordering gap-analysis titles was compounded because expenditure of annual firm order funds had to continue during the same period, giving some liaisons a sizable amount of money to spend between regular collections and the gap project. For example, for fiscal year 2017, the liaison for French and foreign languages had close to \$25,000 to spend which was an increase of \$11,000 over prior yearly amounts.

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as opposed to supporting the models that some large publishers would like to see developed.

The case of OA books is an interesting one: Do preconceptions in the publishing

industry prevent innovation from happening? Does this make even a highly stable setting vulnerable to disruption by outside players? The developments over the coming twelve months will show whether the stakeholders in OA book publishing have learned their lessons from dysfunctional developments in the past. It will be particularly interesting to see

whether OA advocates find ways to unify the conversation across disciplines again — and whether publishers take the opportunity to reduce complexity by streamlining their offers in OA from multiple (books, journals, STM, HSS) to consolidated options. 🌱