

About the Study

The open access movement, which seeks to provide widespread public access to peer-reviewed research and scholarship, has won in recent years the support of governments and funders, as well as many scholarly publishers and scholarly societies. Research is being recognized as a public good that can now be shared globally for the benefit of all. What has yet to be fully worked out are viable financial models for transitioning from subscription to open access models for this literature. Journal subscription revenues in excess of ten billion dollars annually worldwide suggest that there is more than enough money being spent on scholarly publishing to fund open access.

Although research libraries are as willing to support open access as they are to pay for subscriptions, the best transition path between the two models is in need of further testing and analysis, especially in the case of the social sciences and humanities. Journals serving the sciences, especially the bio-medical sciences, have developed a model for open access by having authors use their relatively high grant levels to pay Article Processing Charges (https://en.wikipedia.org/wiki/Article_processing_charge) (APC), which can run as high as five thousand dollars per article. Not only will APCs not work in the social sciences and humanities, it is putting a serious damper on support for open access among faculty in these two areas.

What may well be the way forward for all disciplines is to build on the cooperative spirit shown by research library community. To offer two examples: The University of Pittsburgh Library (<http://library.pitt.edu/e-journals>) is hosting open access journals at no cost to the journals, utilizing the Public Knowledge Project's (<http://pkp.sfu.ca>) open source publishing software which is also library based. With Knowledge Unlatched (<http://www.knowledgeunlatched.org/>), a few hundred research libraries have banded together to underwrite the cost of open access SSH monographs from major scholarly publishers, again without charge to authors or readers.

This is the time, then, for further systematic data-gathering, analysis, and trials of a cooperative publishing model. Can a cooperative offer an economically responsible and sustainable open access to rigorously reviewed and professionally published research? A number of journal collectives and publishers have expressed interest in exploring a

cooperative model and the MacArthur Foundation (<https://www.macfound.org/>) has granted a two-year award to the Public Knowledge Project, working in collaboration with the Scholarly Publishing and Academic Resources Coalition (<http://www.sparc.arl.org/>) (SPARC) and other organizations, to assess the feasibility, as well as the structure, organization, and governance of such co-ops.

The goals of the Open Access Publishing Cooperative Study for the next two years include (a) gathering data from journals and organizations to create a business model and/or to participate in pilots of cooperative publishing with libraries; (b) to consult with stakeholders, including journals, societies, funders, publishers, authors, and readers on what would make cooperatives work or not work; and (c) develop open source infrastructure for conduct co-op pilots to assess journal efficiency and quality through cooperative publishing on a global scale.

If the results of the first three stages show sufficient promise, the Open Access Publishing Cooperative Study plans to hold a culminating “constitutional assembly” for stakeholders in scholarly publishing. The goal of the assembly will be to use what has been learned in the study to forge the principles and recommend the structures by which such cooperatives might constitute a means of bringing about sustainable and universal open access to research and scholarship.

What do we mean by a cooperative?

It is fair to ask what we mean in this study by an open access scholarly publishing cooperative. We see it involving all or some of the following principles, subject to consultation, as it will ultimately be the members of the co-op who determine what will hold for their association:

Structure

1. It is a multi-stakeholder cooperative association involving journals, research libraries, publishers, portals, funding agencies, and others.
2. The co-op is a self-governing, democratically run, legally incorporated non-profit association, committed to improving the access and quality of scholarly publications.
3. It initially forms around the publication of journals and data sets, without precluding later inclusion of books and other scholarly forms and artifacts.
4. It is constituted by communities of interest (region, language, discipline), and participates in a federation of co-ops for global coordination.

Economics

5. The co-op budget is derived from libraries' and funders' previous allocations to subscriptions, subsidies, APCs, grants, and other forms of support.
6. While initially matching journal and society pre-cooperative revenues, the co-op will seek, through allocations and investment, to improve quality, efficiency, and fairness across its publications.
7. It allocates funding to publishing expenses, technical innovation, incubating new journals, training, setting standards, co-op management, etc.
8. It pools stakeholder expertise and in-kind resources (e.g., libraries provide publicity and promotional services, server capacity, etc.).
9. It contracts services (e.g., copyediting, design, software development), and fills its journals' back-issue gaps through

purchase or tax-concession gifts.

Standards

10. The co-op ensures that the co-op's intellectual property -- including publications, data sets, and publishing systems -- is placed under appropriate open licenses.
11. It maintains well-publicized and well-monitored membership criteria, adhering to scholarly publishing standards that build academic and public trust.
12. It develops and supports international and interoperable standards for publishing transparency, systems, impact metrics, and data-set sharing.

These points will be subject to consultations with potential co-op stakeholders, in a study of what is seen as beneficial and needed; acceptable and unacceptable; desirable and undesirable; missing and unobtainable. We are using a consultative, deliberative model with stakeholders as itself part of this study of a cooperative approach.

Study Objectives

Over the next two years (2015 - 2017), the Open Access Publishing Cooperative Study aims to:

1. Gather financial data from journals and libraries to establish current investment levels in professional quality publishing;
2. Consult with stakeholders – research libraries, scholarly journals, scholarly societies, presses, funding agencies, and others – about perceived gains and risks of a co-op approach to open access funding, governance, and structure; and
3. Develop and assess open source co-op publishing infrastructures for running pilot studies to evaluate impact on scholarly and public quality of this approach to open access publishing.

If the results of the first three stages show sufficient promise, the Open Access Publishing Cooperative Study plans to hold a culminating “constitutional assembly” for stakeholders in scholarly publishing. The assembly will apply what has been learned in the study to forge the principles and structures by which such cooperatives might constitute a means of bringing about sustainable and global open access to research and scholarship.

Do you have basic financial data you'd be willing to share (in confidence)? If so, let us know (<mailto:info@oa-cooperative.org>).

Potential Stakeholder Benefits from a Publishing Co-Op



Libraries

Libraries will be able to significantly expand access while at the same time stabilizing their collection budgets.



Societies

Societies will be able to expand their reach and contain their costs.



Journals

Journals will receive sustainable funding and have the opportunity to vastly increase their readership.



Funders

Funders will be able to contribute to a win-win-win situation, where readers, journals,

and libraries all benefit.



Readers

Readers will gain immediate access to the highest quality research papers.



Authors

Authors will no longer need to finance author processing charges, which be as high as \$5000 per article.

Participants

Participants are drawn from representative stakeholders interested in advancing open access publishing in new and creative ways.

Project Team

Project Director: Dr. John Willinsky (Stanford/Simon Fraser)
Project Business Model Consultant: Raym Crow (SPARC)
Project Manager: Kevin Stranack (Simon Fraser)
Project Technical Lead: Alec Smecher (Simon Fraser)
Project Researchers: Kamran Naim (Stanford), Smith Esseh (Kwame Nkrumah University of Science and Technology)

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Dominique Bérubé (Erudit)
Lars Bjørnshauge (DOAJ)
Mal Booth (UT Sydney)
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Melissa Hagemann (Open Society Foundations)
Kevin Hawkins (North Texas)
Sigi Jottkandt (Open Humanities Press)
Rebecca Kennison (K|N Consultants)
Robert Kiley (Wellcome Trust)
Iryna Kuchma (eIFL)
John Maxwell (Simon Fraser)
Susan Murray (African Journals Online)
Lisa Norberg (K|N Consultants)

Frances Pinter (Knowledge Unlatched)

Peter Suber (Harvard)

Wim van der Stelt (Springer Nature)

Funding

The Open Access Publishing Cooperative Study is generously funded by a grant from The John D. and Catherine T. MacArthur Foundation (<http://www.macarthur.org/>).

About the Public Knowledge Project

PKP (<http://pkp.sfu.ca>) is an initiative of the Graduate School of Education at Stanford University (<https://ed.stanford.edu/>), and Simon Fraser University Library (<http://www.lib.sfu.ca>), and it develops free, open source software for open access scholarly publishing and conducts research to improve the quality and reach of scholarly publishing.

Pilot Study Sites

We are pleased to welcome the following sites to the study:

American Anthropological Association

(<http://www.americananthro.org/>)

In conjunction with Libraria (see below), the AAA will be participating in the study, providing data and feedback into the feasibility of a cooperative publishing option.

Annual Reviews (<http://www.annualreviews.org/>)

Since 1932, Annual Reviews has offered comprehensive, timely collections of critical reviews written by leading scientists. Annual Reviews volumes are published each year for 46 focused disciplines within the Biomedical, Life, Physical, and Social Sciences including Economics.

Érudit (<http://www.erudit.org/en/>)

Érudit is an interuniversity consortium and a non-profit organization. For more than 15 years, Érudit has provided the research and cultural communities with a wide range of services in digital publishing and dissemination, from data markup to document indexing through international content aggregators. Érudit disseminates 150 scholarly and cultural journals.

Libraria (<http://libraria.cc/>)

Libraria is a group of learned societies, journals and public interest organisations that have come together to research viable and sustainable open access alternatives to the existing ecology of scholarly publishing dominated and controlled by commercial presses. Libraria is keen to explore cooperative scenarios that may bring together societies, libraries, universities, editors and publishers in a project that proves sustainable and rewarding to all.

Open Access Network (<http://openaccessnetwork.org/>)

The Open Access Network (OAN) is made up of individuals, organizations, societies, publishers, libraries, and institutions working together to Make Knowledge Public. They plan to tackle head-on the challenge of OA business models beginning with disciplines in the humanities and social sciences. The OAN provides a broad and transformative solution for sustainable OA publishing and archiving that is complementary, not competitive, with other OA funding approaches.

PKP Publishing Services (<https://pkpservices.sfu.ca/>)

PKP Publishing Services provides premium software hosting, customization, and support for PKP software applications. A division of

the Public Knowledge Project, all income is invested back into PKP, to ensure financial sustainability and continued open source development.

We have also received expressions of interest from the following sites and are currently investigating their participation:

Association for Heterodox Economics (<http://hetecon.net>)

The Association for Heterodox Economics (AHE) is a learned society which aims to promote open and tolerant debate in economics through a pluralist approach to theory, method, and ideology. The Association, and its membership, seek to promote heterodox economics and perspectives in the academic, governmental and private spheres of the discipline of economics.

Open Library of Humanities (<https://www.openlibhums.org/>)

The Open Library of Humanities (OLH) is a charitable organisation dedicated to publishing open access scholarship with no author-facing article processing charges (APCs). We are funded by an international consortium of libraries who have joined us in our mission to make scholarly publishing fairer, more accessible, and rigorously preserved for the digital future.

We will continue to add new study sites to the list as they sign on.

INTERESTED IN BECOMING A STUDY SITE? ([JOIN.HTML](#))

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Become a Study Site

Are you a scholarly publishing stakeholder? Whether you are with a society, a press, a journal, a library, or anywhere else in the scholarly publishing ecosystem, we want to talk.

We'd love to consult with you (anonymity assured) on the potential benefits and affordances, as well as challenges, risks, and downsides of forming an open access publishing co-op.

We also need stakeholder data (on a confidential basis) ([docs/Cooperative_Data_Request.pdf](#)) on publication costs and revenues to assess co-op feasibility.

If you're not ready to join, but still want to stay informed on what this study finds and how it unfolds, contact us (<mailto:info@oa-cooperative.org>).

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