OA2020 US Working Group
Business models and transition mechanisms in open access and transformative agreements
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Agenda

Wiley’s OA Journey
Read and Publish
Lessons Learned
Open Research

Facilitating faster and more effective research discovery

Open access
Helping researchers share their work with the world

Open data
Enabling reproducibility and verification of researcher data, methodology, and reporting standards

Open practices
Focusing on transparency in research communication and peer review

Open collaboration
Helping researchers work together

Open recognition & reward
Making sure researchers get credit for all their work
Our open access program is 10 years old!

What a journey.

From two fully gold OA journals in 2011 to 232 in 2020.

From 2,000 articles published open access in 2012 to 53,000 in 2020.

Congratulations to our authors, partners and colleagues for joining us in a more open future.
OA Output Growth

Hybrid OA articles up 70% YoY

Gold OA up 39% YoY

Subscription articles up 8% YoY

26% submissions growth
Wiley strives to lead the market in the transition to open access while ensuring a fair and equitable return to our society partners.

**Wiley Acquires Hindawi**
Hindawi is one of the world’s fastest growing open access publishers, with a robust full-gold open access portfolio of 240 peer-reviewed scientific, technical, and medical journals, and a technologically advanced, author centric publishing platform.

**Transitional Deals**

**The Institution of Engineering and Technology and Wiley Announce Open Access Publishing Partnership**
IET partners with Wiley and transitions its entire hybrid subscription journals portfolio (40 journals) to a gold OA model, joining its existing gold open access journals, to create a leading collection of engineering and technology open access journals.
Wiley’s Approach to Open Access

Open Access Launches

With careful market analysis, we ensure each new journal addresses a gap within the subject community and has its own unique aims and scope.

Our new journals span a wide range of subjects and disciplines, both in partnership with societies and as our own proprietary titles.

Wiley’s new OA launches cater to a wide variety of researchers needs, with titles that publish research on a sound science value and ethos, such as Ecology and Evolution, through to cutting edge research, as shown with our new highly selective title Advanced Genetics.

Transitioning the Market

Transitioning individual journals to OA allows us to meet the needs of specific subject and author communities. However, Wiley is also committed to delivering OA options on a larger scale via the negotiation of country-level agreements.

These agreements allow authors to choose the OA publishing option in any of our Hybrid journals with no charge to the author. In addition, several of these agreements also make provision for publishing in any of our Gold OA titles.

Wiley has already negotiated country-level agreements in the UK, Germany, Austria, The Netherlands, Hungary, Sweden, Norway and Finland and at institutional level with Iowa State University in North America.

Transitioning Journals to OA

We have successfully transitioned 41 titles to OA since 2012.

When transitioning a title to a fully Gold OA model, we consider:

- subject discipline
- funding availability
- geographical distribution of authors
- journal and article types
- Finances

Based on historic flip data, we have seen usage increase significantly during the year of the transition to OA, and this trend continues after the transition year. On average, usage more than doubles in the transition year.

We have also seen increases in Impact Factor in all journals that we have flipped across varying subject disciplines.
Read and Publish
A Road Map for Transition to Open Access

Read and Publish

A transitional agreement allows the migration of funding from reading towards publishing – while recognizing that the subscription element remains an important part of the agreement.

• OA publishing rights to all journals currently in the Wiley database.
• Guarantee perpetual access rights to all subscribed content published in each year of the term of the agreement.
• Reduce reading fees to a certain percentage to the total fee in final year.
• OA funding increasing from Year 1 to final year.
From Read to Publish

Reduces the proportion allocated to reading content from Year 1 to Year 3.

Cost for Read Access

- Current: 120%
- Year 1: 80%
- Year 2: 60%
- Year 3: 40%

OA Funds

- Current: 10%
- Year 1: 30%
- Year 2: 50%
- Year 3: 60%

Increases funds available to authors to publish open access.
The result – an increase in OA articles published

The proportion of open access articles increase from its starting level (funded by the authors only) to Year 3 (funded within the agreement).
Read and Publish

Before agreement

Subscriptions

decentralized Open Access

Y1

Open Access fund
(Publishing allocation)

Subscriptions
(Reading allocation)

Y2

Open Access fund

Subscriptions

Y3

Open Access fund

Subscriptions

OA2020 US Working Group
Why Read and Publish?
Enable institutions, researchers and publishers to transition to a more open future in a sustainable way

**For Libraries**
Puts the library at the center of scholarly communication in the institution.

Provides a new layer of support to faculty, researchers and students.

Supports the institutional mission.

Continues their ability to control spend.

Builds increasing value over time.

**For Wiley**
Allows us to deliver on change in a predictable and sustainable way.

Ensures there is always a reading fee, allowing us to sustain journals in under-funded disciplines.

Supports our societies in a manageable way through the transition and enables us to make some of world’s best and most respected research open access.

Allows us to invest in successful execution across the ecosystem.

Enables us to lead in open access by combining agile strategies with respect for different positions.
Lessons Learned
Assessing OA Readiness

Open Access readiness dimensions

### EARLY STAGE/LOW OA READINESS

- **OA as an on-going industry movement**
  - OA as a regional/institutional priority or mandate

- **Authors autonomously choose OA**
  - Institution/Consortia promotes and sponsors OA

- **OA publishing is dispersed and not tracked**
  - OA publishing is enabled and tracked centrally

- **OA publishing is funded by author/grant**
  - OA publishing is funded by a central budget

- **OA advocacy is fragmented or dispersed**
  - OA advocacy is widespread and coordinated

### HIGH OA READINESS

- **Prioritization**
  - OA as an ongoing industry movement

- **Sponsorship**
  - Authors autonomously choose OA

- **Management**
  - OA publishing is dispersed and not tracked

- **Funding**
  - OA publishing is funded by author/grant

- **Advocacy**
  - OA advocacy is fragmented or dispersed
Lessons Learned

Author Behavior

Journal/Publisher Selection

Predicting article output in a tough science

COVID bump: a new normal or return to normal
Thank you!

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