OPEN ACCESS MONITOR GERMANY

SONAR Workshop OA Monitoring 2019, Bern

04.12.2019 I IRENE BARBERS, PHILIPP POLLACK | Forschungszentrum Jülich, Central Library

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MONITORING THE TRANSITION TO OPEN ACCESS

- Reliable Data is needed to support the transition to Open Access and to monitor the shift of financial flows
  - Publications data: count of publications per publisher, per journal, per institution; proportions of Open Access and Closed Access
  - Cost data: subscription expenditure and publication fees
  - Usage data
  - Citations
- Until 2018 only singular reports with a limited scope available
  - On federal state level (for Berlin in 2016)
  - For individual institutions (OA Barometer, FZ Jülich)
- **Universally desirable for all academic institutions**

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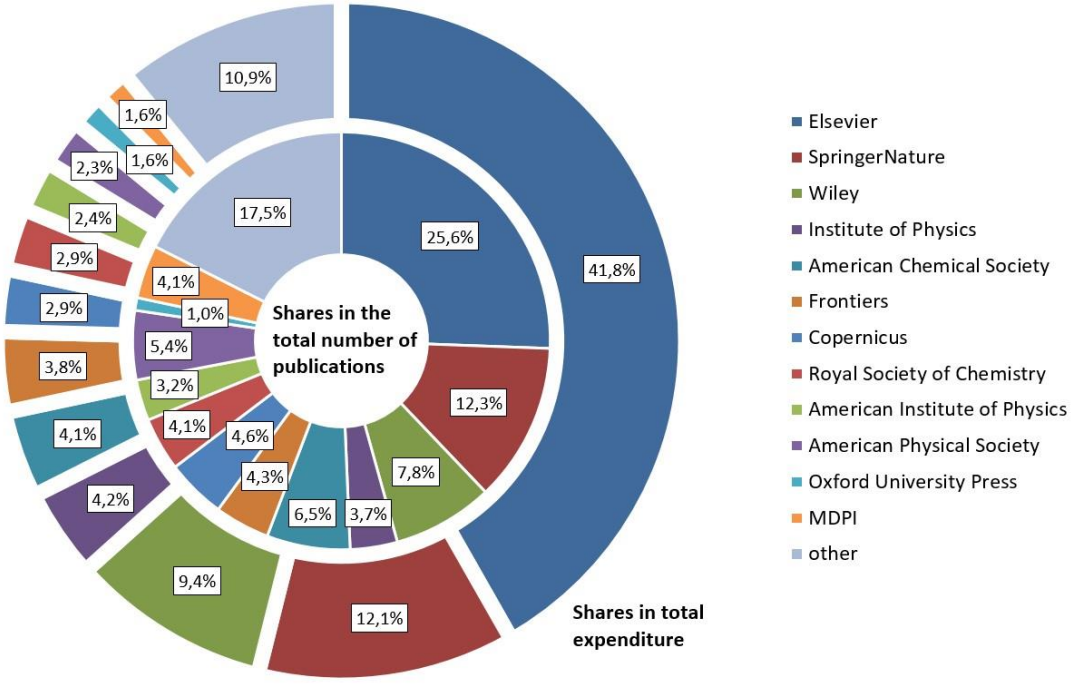
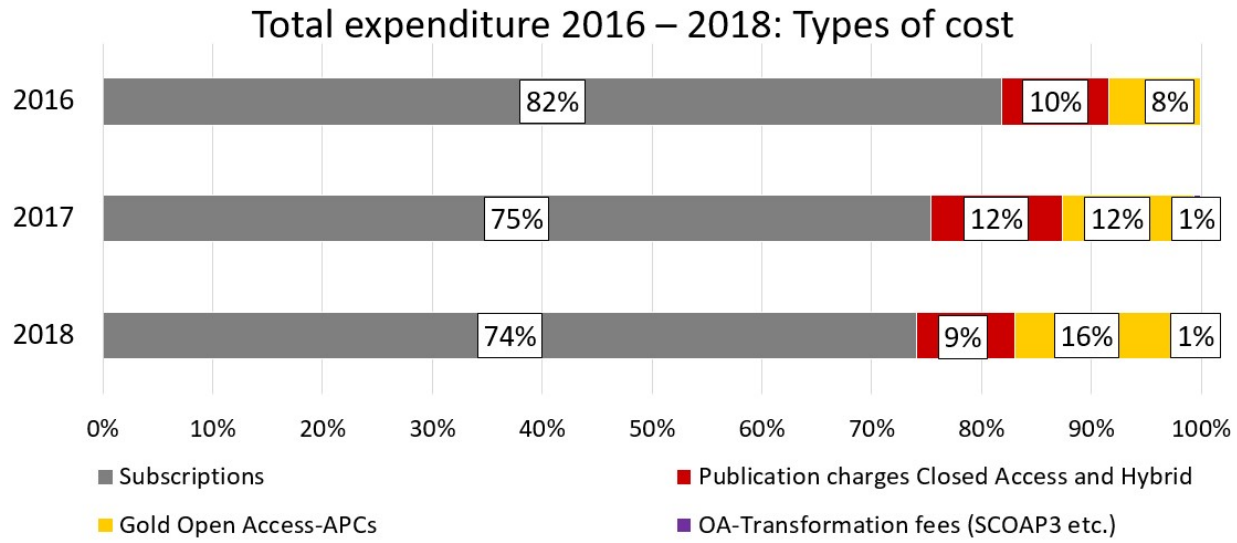
MONITORING THE TRANSITION AT THE LOCAL LEVEL

Open Access Barometer Forschungszentrum Jülich

Shares of publishing houses in number of publications and in total expenditure 2018





https://www.fz-juelich.de/zb/EN/Expertise/open_access/oa_barometer/oa_barometer_node.html

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OPEN ACCESS MONITOR GERMANY: PROJECT ORGANIZATION

- Data Office for the National Contact Point Open Access **OA2020-DE** - funded by the **Alliance of Science Organizations in Germany** to support the large-scale Open Access transformation until mid-2020: 1 of 3 FTEs
- **SynOA** - funded by the **Federal Ministry of Education and Research** as a part of the national Open Access Strategy until mid-2020: 2 FTEs + part-time contributions from FZ Jülich staff
- Application for continued funding in preparation

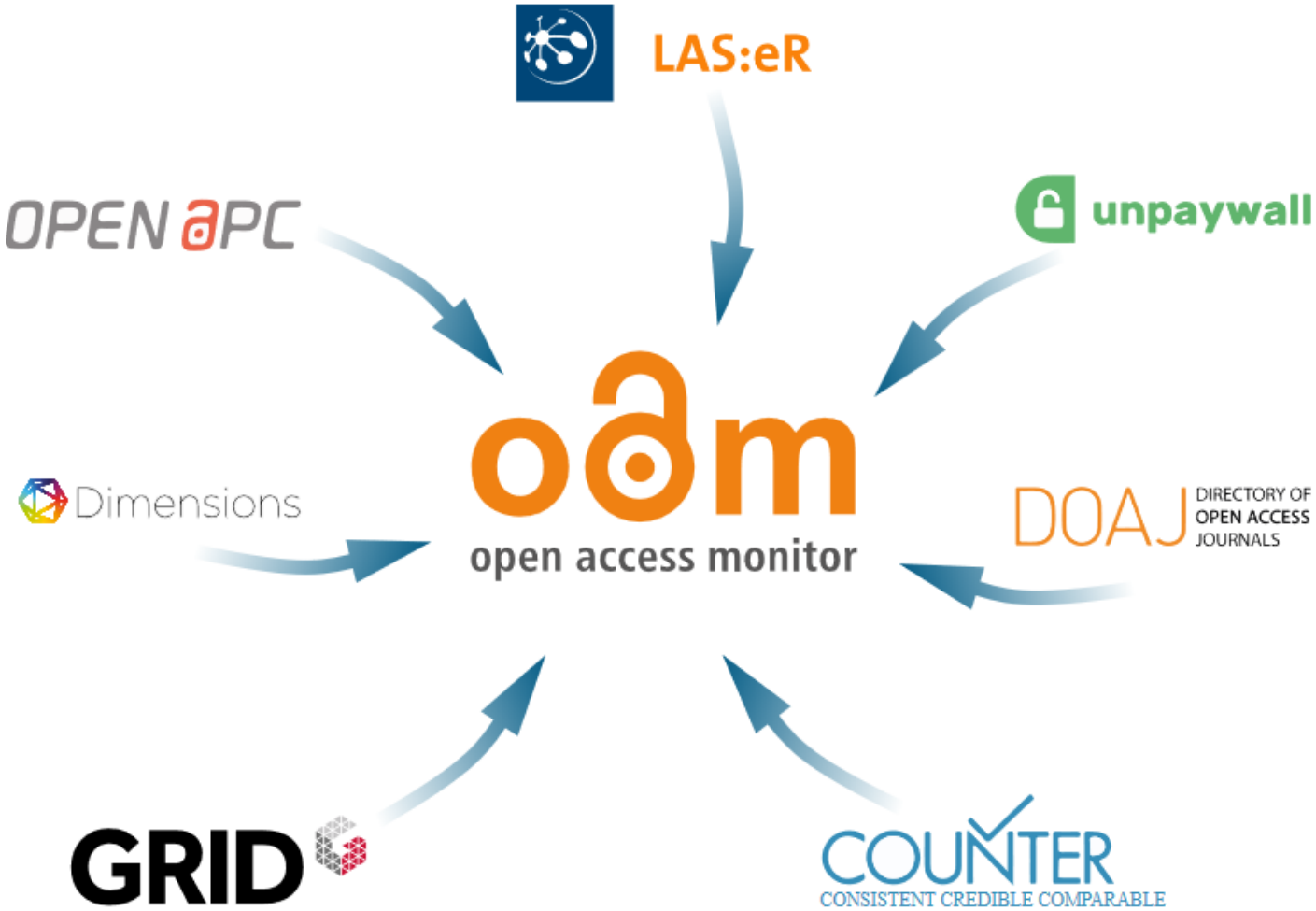
PROJECT MISSION

- The Open Access Monitor Germany aims to cover the full extent of publications that have been published by German academic institutions in scholarly journals
- By analysing subscription expenditure and publication costs we observe and support the transition to the Open Access model in German scholarly publishing
- The Open Access Monitor Germany builds upon systems which are already in existence or are currently being developed
- It serves as a data warehouse for OA2020-DE, e.g. compiles supporting data and prepares reports to inform negotiations for transition agreements

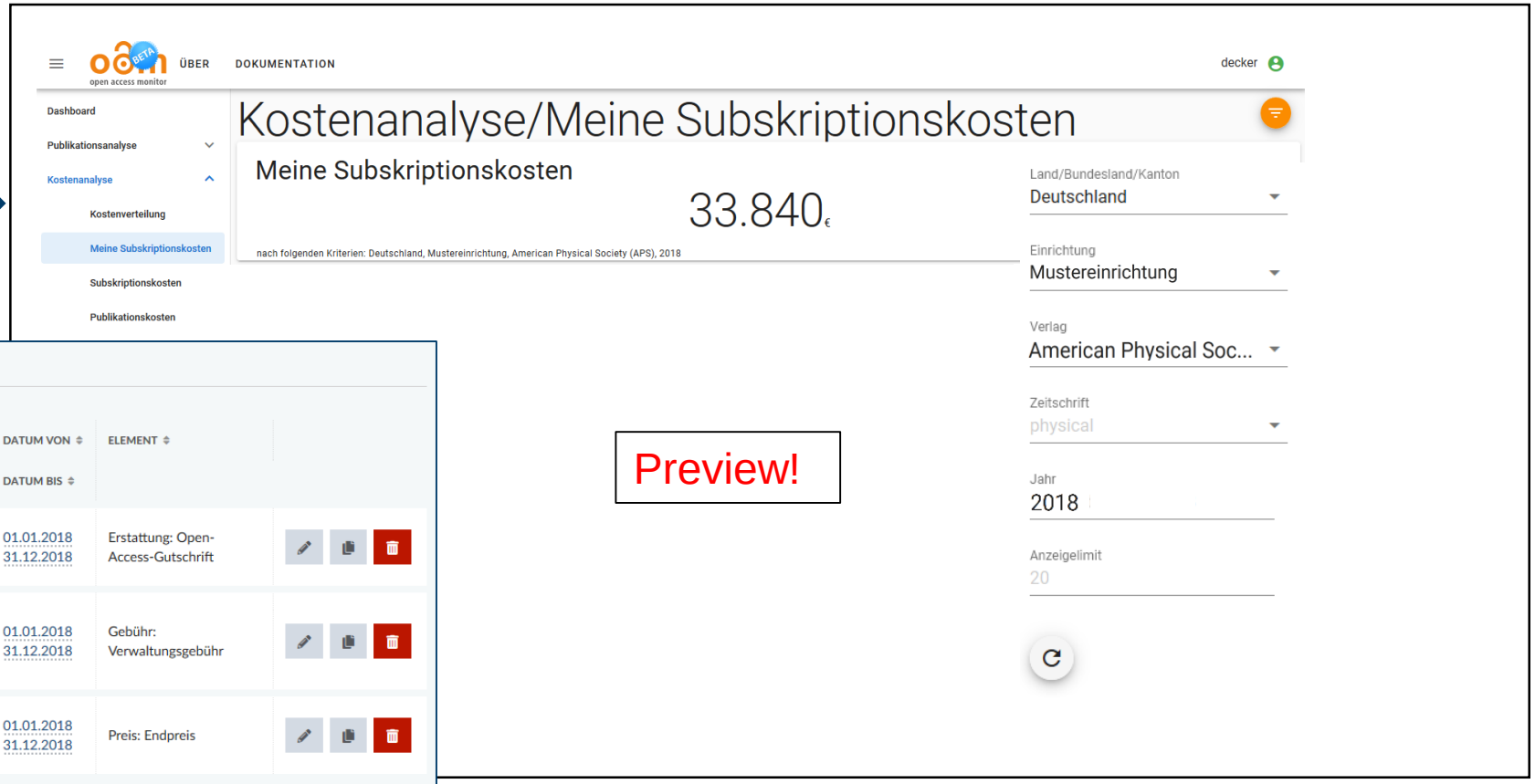
PROJECT STAKEHOLDERS

- **National and regional authorities** gain detailed overview of the situation in their area of responsibility
- **Funder**s may prioritize and evaluate their programmes
- **Institutions** may identify scientific areas where they can increase their efforts
- **Libraries** may negotiate fact-based agreements for the transition to Open Access and switch funds from subscription budgets to publication funds
- **ScholComm Researchers** have access to data for research on scholarly publishing
- **Publishers** can verify their own data on publications

SOURCE SYSTEMS



VIEWS AND ANALYSES



Preview!

Eigene Kosten

NR.	BEZEICHNUNG		RECHNUNGSSUMME	WERT (IN EUR)	STATUS	DATUM VON / DATUM BIS	ELEMENT	
1	Gutschrift SCOAP3	⊖	5.813,12 USD 6.917,61 USD (19%)	4.970,18 € 5.914,51 € (19%)	feststehend	01.01.2018 31.12.2018	Erstattung: Open-Access-Gutschrift	
2	Handling	⊕	1.134,07 USD 1.134,07 USD (Steuersatz nicht gesetzt)	969,62 € 969,62 € (Steuersatz nicht gesetzt)	feststehend	01.01.2018 31.12.2018	Gebühr: Verwaltungsgebühr	
3	APS all	⊕	38.120,00 USD 45.362,80 USD (19%)	32.592,34 € 38.784,88 € (19%)	feststehend	01.01.2018 31.12.2018	Preis: Endpreis	
GESAMTKOSTEN								
	Rechnungssumme in USD Endpreis		33.440,95 USD 39.579,26 USD					
	Wert in EUR Endpreis			28.591,78 EUR 33.839,99 EUR				

LAS:eR

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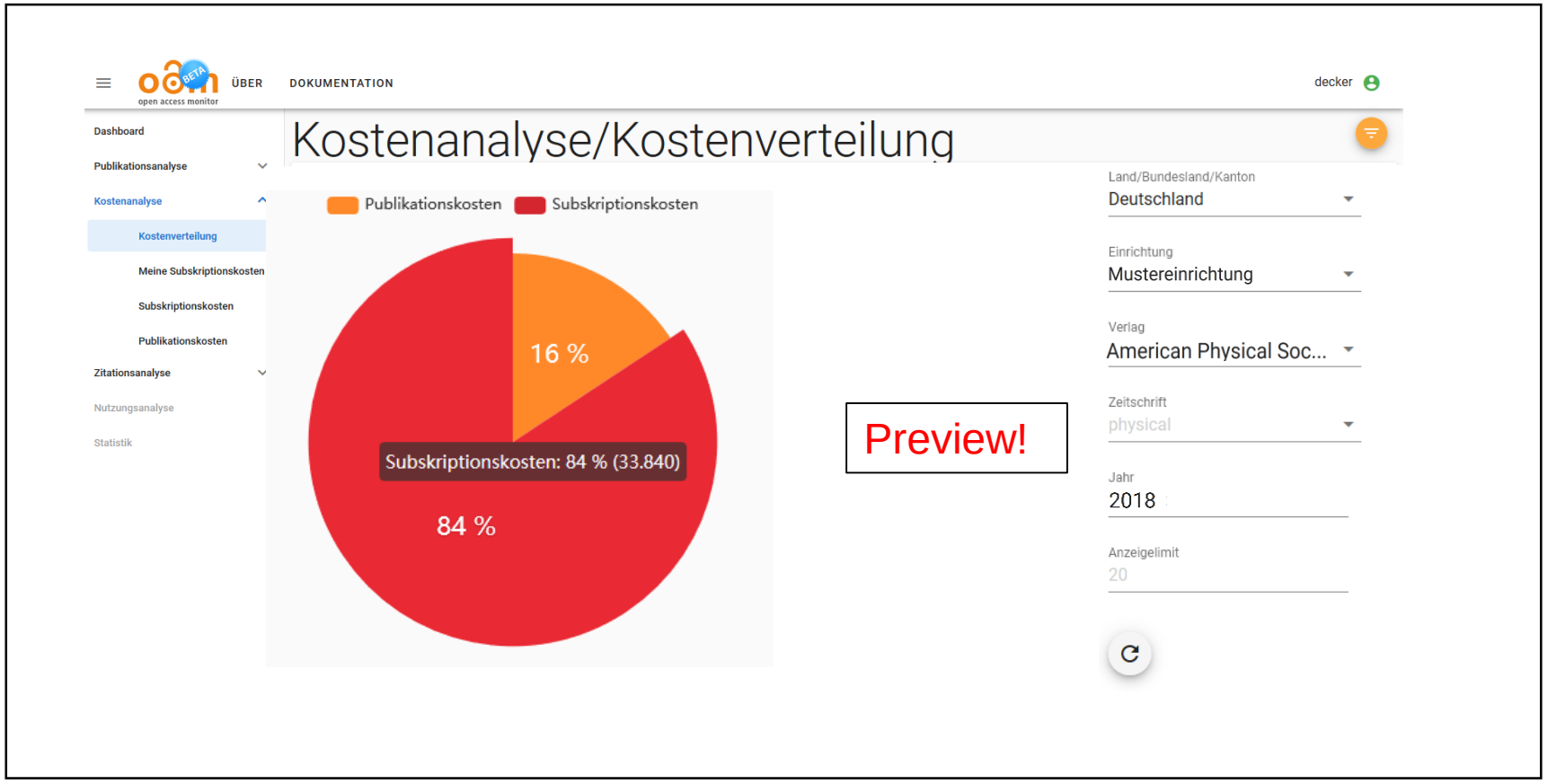
VIEWS AND ANALYSES



OPEN ACCESS MONITOR GERMANY: SUMMARY

- Database developed, set up and running
- Data sources integrated
- Web Interface established and already well used by the community
- Libraries are advised on use of web interface and interpretation of data, e.g. in the DEAL context
- API and Query Tool provided
- Code snippets for embedding into institutional websites

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OPEN ACCESS MONITOR GERMANY: OUTLOOK

- Expand data on subscription expenditure
- Integrate additional data sources
- Investigate possibilites for monitoring of traditional publication costs, e.g. colour charges
- Develop more functionalities for different use cases and according to user feedback
- Supply more views and analyses, e.g. views for consortia
- Integrate usage data
- Introduce mapping to fields of research

TEAM AND CONTACT

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https://www.fz-juelich.de/zb/synoa_en

https://open-access-monitor.de

SOURCE SYSTEMS REFERENCES

Dimensions	https://www.dimensions.ai/
GRID	https://www.grid.ac/
OpenAPC	https://www.intact-project.org/openapc/
LAS:eR	https://laser.hbz-nrw.de/
Unpaywall	https://unpaywall.org/
DOAJ	https://doaj.org/