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
MONITORING THE TRANSITION AT THE LOCAL LEVEL

Open Access Barometer Forschungszentrum Jülich

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
• **Funders** 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

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VIEWS AND ANALYSES

Kostenanalyse/Kostenverteilung

Subskriptionskosten: 84 % (33.840)

6 %

16 %

84 %
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
OPEN ACCESS MONITOR GERMANY: OUTLOOK

• Expand data on subscription expenditure
• Integrate additional data sources
• Investigate possibilities 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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<th>Name</th>
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<th>Role</th>
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- **https://www.fz-juelich.de/zb/synoa_en**
- **https://open-access-monitor.de**
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