Knowledge Unlatched webinar

Usage of Open Access scholarly books during the Covid-19 pandemic

March 22, 2022, 3 p.m. CET
Mirela Roncevic, Ph.D.
Knowledge Unlatched
Mirela@knowledgeunlatched.org
Webinar goals

1. Insight into the impact of the pandemic on Open Access monograph publishing

2. Insight into the usage of monographs during the pandemic

3. Highlight key takeaways from the pandemic

4. Draw attention to the importance of OA infrastructure post-pandemic

5. Encourage integration of OA infrastructure into library catalogs post-pandemic
The state of Open Access monographs prior to the pandemic

- Open Access is still a relatively small part of the monograph landscape.

- In mid-2019, the Directory of Open Access Books (DOAB) lists fewer than 20,000 OA books of all dates, compared to some 86,000 monographs published internationally every year.

- Initiatives such as Knowledge Unlatched and Toward an Open Monograph Ecosystem (TOME) are experimenting with new business models to move us to a more sustainable system in which costs are shifted from authors to institutions.

- Publishing is still driven by the needs of a print and journal-based market. As a result, monographs remain largely outside the growing digital scholarly infrastructure.

- The challenges publishers face in adding OA monographs to their programs include issues with discoverability.

https://www.digital-science.com/blog/2019/06/the-state-of-open-monographs-dsreports/
The state of Open Access monographs prior to the pandemic – Key recommendations

IMPROVE DISCOVERABILITY -- Publishers should invest in quality metadata for discovery.

IMPROVE INTEROPERABILITY -- Distributors and aggregators should make their usage data available in interoperable and standard forms.

INCREASE FUNDING – Funders should recognize the value that OA monographs contribute to scholarship and fund the move towards OA at a sustainable rate.

The Impact of the Covid-19 pandemic on Open Access

- Not the first global health crisis to demonstrate the role of OA in disease response; in 2015, a group of scientists working on the Ebola pandemic drew attention to the slow response to detecting the disease and to a closed and inequitable research system.

- Academics’ awareness of Open Access increased significantly during the pandemic (according to a study published in 2021 in SAGE’s Journal of Librarian and Information Science).

- The pandemic exposed a number of existing barriers to open research and highlighted both advantages of OA publishing as well as new challenges for all stakeholders.

- The pandemic changed OA in various areas of the publication process, including the pre-publication stage (preprints and article peer review), funding, and infrastructure (discovery and metadata).
The Impact of the Covid-19 pandemic on Open Access

• Not the first global health crisis to demonstrate the role of OA in disease response; in 2015, a group of scientists working on the Ebola pandemic drew attention to the slow response to detecting the disease and to a closed and inequitable research system.

• Academics’ awareness of Open Access increased significantly during the pandemic (according to a study published in 2021 in SAGE’s Journal of Librarian and Information Science).

• The pandemic exposed a number of existing barriers to open research and highlighted both advantages of OA publishing as well as new challenges for all stakeholders.

• The pandemic changed OA in various areas of the publication process, including the pre-publication stage (preprints and article peer review), funding, and infrastructure (discovery and metadata).
The opening of closed scholarly content during the pandemic

- Covid-19 gave university presses and libraries an opportunity to highlight their mission-driven identities.
- In early 2020, many publishers rushed to open content by relaxing access restrictions, and libraries worldwide took advantage.
- In the US, the ‘opening of scholarly content’ was driven by university presses, which made entire collections open at various points during the early stages of the pandemic.
- In the UK, Jisc and several other organizations issued a call for publishers to remove barriers to concurrent use and restricting off-site access. Around 40% of university and educational publishers in the UK made content freely available or at a limited rate.
- The measures that took place in 2020 were temporary and referred to as “a limited time offer.”
- The initiatives varied in scope -- Some publishers only opened the content that was useful for understanding the pandemic while others opened larger collections in various disciplines.
- The initiatives varied in time limit – Most content was only made open for several months; usually through the end of June 2020.
- The initiatives varied in degree of openness -- Some collections required registration, others did not; some titles were free-to-read only, while others were also free-to-download.
The opening of closed scholarly content during the pandemic, cont.

- More than 80 members of the Association of University Presses opened a wide variety of books (as well as journals) in the first half of 2020.

- University presses made their books freely available on the Project Muse and JSTOR platforms until end of June 2020.

- The Ohio State UP opened all its monographs, textbooks, and journals.

- University of Arizona Press opened all its monographs and textbooks.


- Cambridge UP opened its textbooks through the end of May 2020.

- More than 75 publishers made their publications freely accessible to any institution with a ProQuest account through mid-June 2020.
Immediate result: usage of non-OA monographs began to increase

“Google Analytics unique pageviews of the University of Michigan Press Ebook Collection have increased over 650% since the collection was made free-to-read on March 20, COUNTER 5 unique title requests are more than double what they were for the equivalent period in 2019, and over 95% of authors in the collection have indicated that they are supportive.”
Usage of books made OA through Knowledge Unlatched 2017-2019 (three years)

4,765,376
Usage of books made OA through Knowledge Unlatched during the pandemic, 2020-2021 (two years)
OAPEN promotes and supports the transition to open access for academic books by providing open infrastructure services to stakeholders in scholarly communication. We work with publishers to build a quality-controlled collection of open access books and provide services for publishers, libraries, and research funders in the areas of hosting, deposit, quality assurance, dissemination, and digital preservation.

• 20,303 items in total
• 18,643 books
• 1,643 chapters
Total Usage for the calendar year 2020 (COUNTER-data)
-- 4,943,308 downloads

Total Usage for the calendar year 2021 (COUNTER-data)
-- 11,239,575 downloads

% increase in usage year to year
- 2019 to 2020: 77%
- 2020 to 2021: 127%

This data is provided by the DOAB Foundation and/or OAPEN Foundation
Libraries and institutions that accessed the OAPEN platform from January to August 2021

Recommended article on OAPEN usage: The OAPEN Library and the Origin of Downloads -- https://oapen.hypotheses.org/246

Ronald Snijder, PhD
Deputy director, OAPEN Foundation
Launched in January 2020

Accessible to anyone, anywhere in the world with no restrictions

Very user-friendly with up-to-date functionality for users

Tens of thousands of quality Open Access items from 130+ publishers and growing, free of any hosting charges

A variety of formats: books, chapters, articles, videos, podcasts, posters

Indexing for libraries through all major discovery services (ProQuest/Ex Libris, EBSCO, OCLC)

Libraries support funding through Membership (Basic or Premium), with unique benefits for Premium Members

www.openresearchlibrary.org
Usage of the Open Research Library, Top Ranking Countries

2020

Locations
- United States: 22,105
- Germany: 11,882
- India: 9,073
- Brazil: 5,934
- United Kingdom: 4,695
- Bangladesh: 4,482
- Canada: 3,509
- Australia: 3,416

2021

Locations
- United States: 37,926
- Germany: 26,449
- United Kingdom: 19,578
- Canada: 12,300
- Australia: 11,257
- Austria: 4,361
- India: 3,510
- France: 3,227
User interactions on the ORL platform between January 2020 through December 2021 (Europe)
User interactions on the ORL platform between January 2020 through December 2021 (North America)
Overall Usage of the Open Research Library in 2020

Overall Usage of the Open Research Library in 2021
Increase in the number of library integrations of the Open Research Library during the pandemic.
Total **user interactions on the ORL** (including downloads and views):

Books == 235,233 in **2020** to 546,745 in **2021**

Chapters == 228,257 in **2020** to 706,789 in **2021**

= **doubling and tripling** of usage for these content types in the past two years
Significantly increased usage of Open Access monographs on both platforms during the pandemic

- Total Downloads for 2020 -- 4,943,308 downloads
- Total Downloads for 2021 -- 11,239,575 downloads

% increase in usage year to year

- 2019 to 2020: 77%
- 2020 to 2021: 127%

- Total Downloads for 2020 – 164,370 for books and 216,220 for chapters
- Total Downloads for 2021 – 408,758 for books and 689,183 for chapters

% increase in usage year to year

- 2020 to 2021: 249% for books and 319% for chapters
The pandemic showed a tremendous increase of usage of OA monographs. The pandemic was a reminder that temporary access to books was not Open Access. The pandemic demonstrated an urgent need for more OA content, including monographs. The pandemic highlighted the limitations of print books (including access and steep prices).

The pandemic showed the value of accessible infrastructure for all communities. Academics became more willing to embrace OA publishing for monographs. Publishers started showing more interest in experimenting with new OA business models. Funders started to accelerate Open Access mandates and policies for scholarly books.
UK policy change on OA monographs

• The most significant change in the UK’s research approach to OA monographs took place in 2020 when UKRI (UK Research and Innovation) published its new Open Access Policy.

• The final version of the policy released in August 2021 confirmed that all monographs, book chapters and edited collections resulting from UKRI funding published on or after January 1, 2024, will need to comply with OA policies, falling in line with the requirements for research papers and conference proceedings.

• This decision forms part of Plan S, an initiative aimed at driving forward immediate and open access to science research funded both publicly and privately.

Moving forward post-pandemic

- More funding
- Sustainable business models
- Quality metadata
- Discovery/Visibility
Visibility = Infrastructure = Integration

- The need for sustainable Open Access infrastructure
- The importance of integration of Open Access monographs into library catalogs

Kathleen Shearer, Executive Director of the Confederation of Open Access Repositories (COAR):

“To expand and extend open science practices beyond the COVID-19 pandemic, we need to incentivize openness through reforming research evaluation systems (that often rely on very narrow metrics) and redirect funding towards open services and infrastructures.”
• Pandemic Disruptor: Canadian Perspectives on how COVID-19 is Changing Open Access, Part 1 (Butler, 2021)

• Pandemic Disruptor: Canadian Perspectives on how COVID-19 is Changing Open Access in Canada, Part (Buler, 2021)

• 'Crucial time' for OA monographs (Eve, 2021)

• Has Covid-19 helped secure the future of Open Access monographs? (Metcalf, 2021)

• Knowledge Infrastructures, Monographs and Why Open Access Must be Part of the Post Pandemic New Normal (Pinter, 2020)

• Open Access lessons during Covid-19: No lockdown for research results! (Rooryck, 2020)

• Publishing during pandemic: Innovation, collaboration, and change (Smart, 2020)

• Viral Open Access in Times of a Global Pandemic (van Gerven Oei, 2020)

• Forward Looking Thoughts: Monographs in a Post-COVID World (Various, 2021)


• University presses and the impact of COVID-19 (Watkinson, 2021)

• Will the coronavirus slow open access – and is the answer different for books and journals? (Wise, 2020)
Discussion

Mirela Roncevic, Ph.D.
Mirela@knowledgeunlatched.org