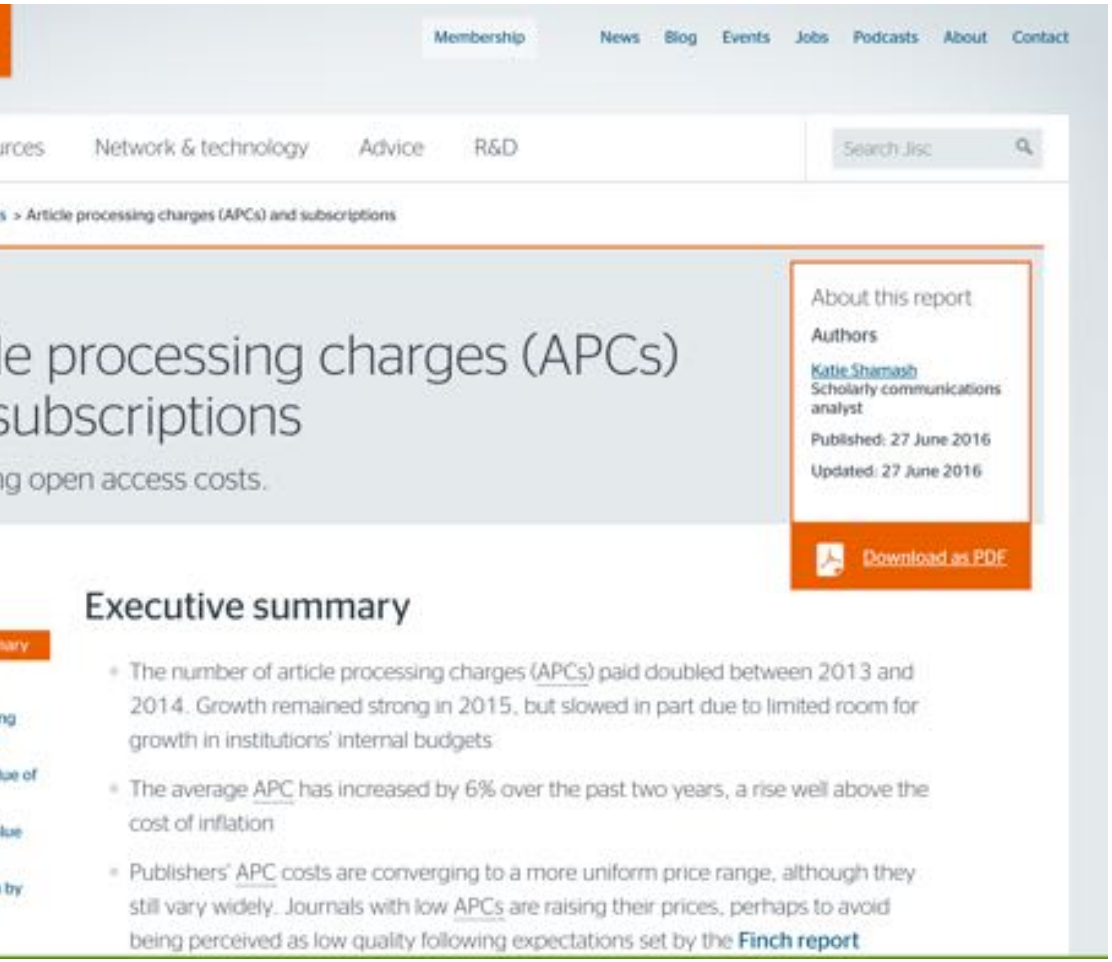
Open access business models for humanities

Pierre Mounier (OpenEdition / EHESS)

STEM disciplines : the rise of APC model

- « The research communications system is in a period of transition towards open access. We believe that, at its simplest, this is a shift from a reader-pays to an author-pays system, which in turn requires a shift in publications processes and business models. The aim of our recommendations is to accelerate that process, but in an ordered way »
- « would require an additional £50-60m a year in expenditure from the HE sector: £38m on **publishing in open access journals**, £10m on extensions to licences for the HE and health sectors and £3-5m on repositories, plus one-off transition costs of £5m. »

The rising cost of APCs

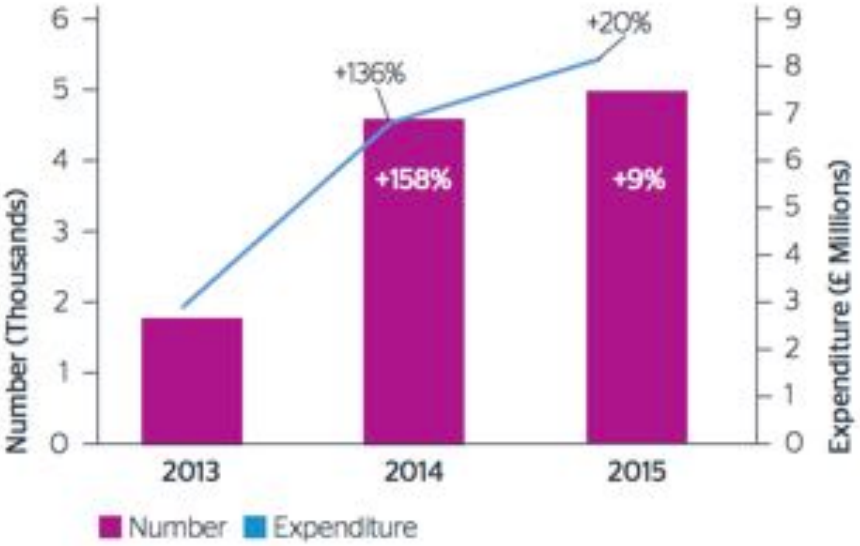


Trends in value and number

The number of APCs is skyrocketing. Between 2013 and 2014, the number of APCs doubled. Growth remained strong in 2015, but not as strong as in the previous year. One reason for this may be that RCUK funds were introduced in 2013-14 to pay for APCs, and 2014 was the first full year in which they were available. In 2015, growth had to come from within the RCUK grant or from institutions' own internal funds.

Figure 2: Growth in APCs 2013-2015. 14 institutions

APC expenditure doubled between 2013 and 2014, in part due to the introduction of RCUK funding.



igure 12: Average APC by journal type, 2014-2015
4 institutions)

he average APC for hybrid journals is consistently
everal hundred pounds higher than full open access
urnals, but full OA APCs are increasing more rapidly.

Figure 9: Average APC

There is a large variation in APC pricing across publishers. The highest average APC charged by a major publisher is ov
£1,200 higher than the average APC.

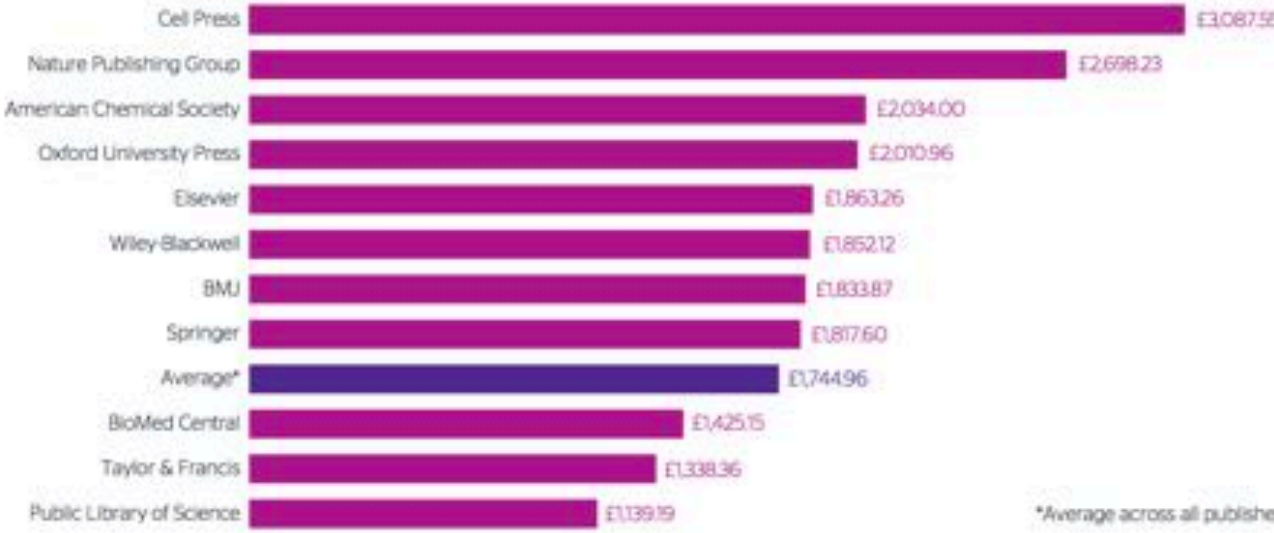
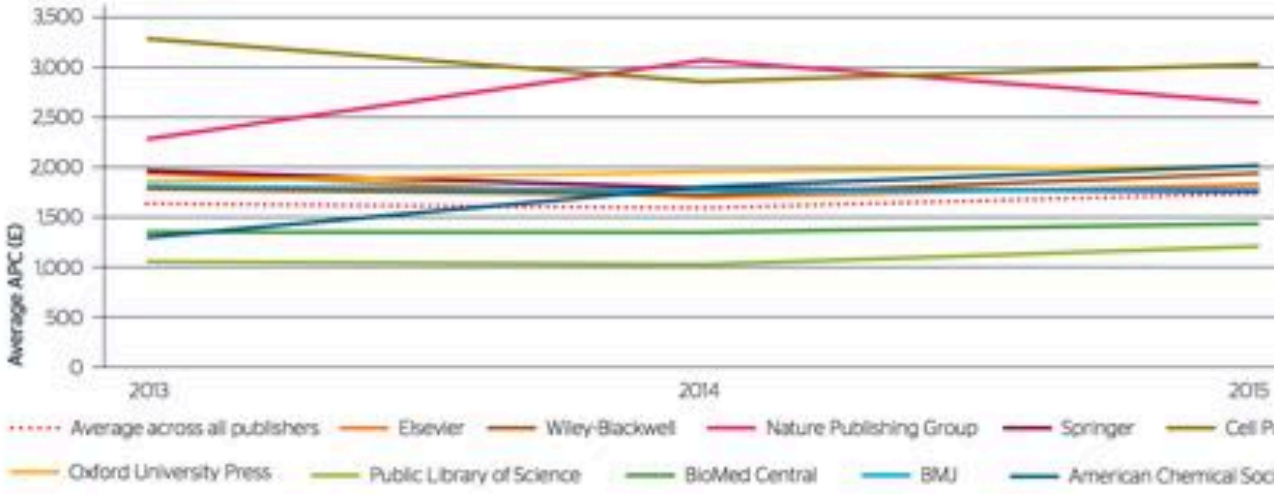


Figure 10: Average APC 2013-15

The average APC is beginning to converge and shows a general upwards trend.



PLOS

A massive business model based on APC

Investment for Current and Future Research Communication

PLOS published approximately 31,000 research articles in 2015, bringing the total number of Open Access articles published by PLOS to more than 165,000. The transition to Open Access that PLOS, together with others, has led for more than a decade continues to drive growth in the overall market share of Open Access publishing, in line with the goals of PLOS.

As of December 31st 2015, PLOS had net assets of $30.6 million, equivalent to the previous year. Of the 2015 year-end net assets, cash and unrestricted investments totaled $24.5 million compared to $28.9 million at year-end 2014 primarily due to investments in capitalized software development activities. For the year ending December 31st 2015, PLOS generated total revenues of $42.9 million compared to total revenues of $45.6 million for the year ending December 31st 2014, due to declines in publication fees and investment income.

BALANCE SHEET
December 31, 2015
($000's)

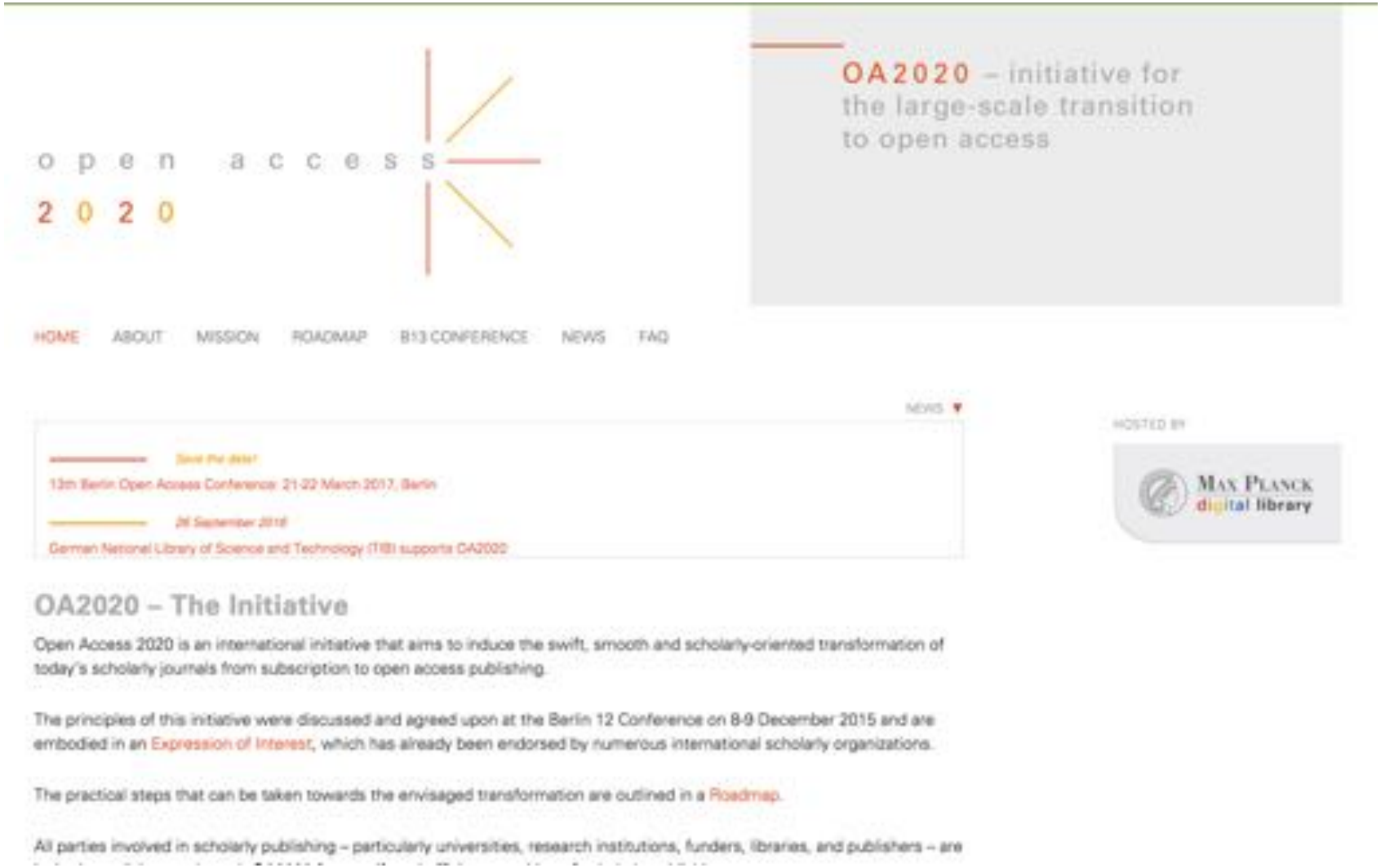
ASSETS 2015	
Current Assets	
Cash and cash equivalents	1,757
Program and accounts receivable, net	1,845
Prepaid expenses and other	814
Total current assets	4,417
Noncurrent Assets	
Investments	22,745
Restricted investments, long term	281
Loan receivable	56
Property and equiptment, net	1,931
Software development costs	6,738
Deposits	8
Total noncurrent assets	31,759
Total Assets	**36,176**

LIABILITIES AND NET ASSETS 2015	
Current Liabilities	
Accounts payable	2,072
Accrued liabilities	1,688
Institutional deposits	712
Deferred revenue	564
Total current liabilities	5,036
Deferred rent liability	494
Total liabilities	5,531
Net Assets	
Unrestricted	30,524
Temporarily restricted	122
Total new assets	30,645
Total liabilities and net assets	**36,176**

STATEMENT OF ACTIVITIES
For the Year Ended December 31, 2015
($000's)

REVENUE, GAINS (LOSSES) AND SUPPORT 2015	
Public support revenue	208
Program revenue	
Publication fees, gross	44,604
Less: Publication fee assistance	(2,329)
Publication fees, net	42,275
Reprints and sponsorships	69
Advertizing	496
Total program revenue	42,840
Unrealized losses on investments	(1,259)
Other income, net	227
Interest and divident income	849
Total revenue, gains, (losses) and support	**42,866**
Expenses	
Publishing program expenses	34,239
General and administrative expenses	8,610
Total expenses	**42,850**
Increase in net assets	**16**

Generalize APC model



Disrupting the subscription journals' business model for the necessary large-scale transformation to open access

A Max Planck Digital Library Open Access Policy White Paper

Published: 28 April 2015

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Authors: Ralf Schimmer[1], Kai Karin Geschuhn[1], Andreas Vogler[1]

Contact: schimmer@mpdl.mpg.de

[1] Max Planck Digital Library, Amalienstraße 33, 80799 München, Germany

Abstract

This paper makes the strong, fact-based case for a large-scale transformation of the current corpus of scientific subscription journals to an open access business model. The existing journals, with their well-tested functionalities, should be retained and developed to meet the demands of 21st century research, while the underlying payment streams undergo a major restructuring. There is sufficient momentum for this decisive push towards open access publishing. The diverse existing initiatives must be coordinated so as to converge on this clear goal. The international nature of research implies that this transformation will be achieved on a truly global scale only through a consensus of the world's most eminent research organizations. All the indications are that the money already invested in the research publishing system is sufficient to enable a transformation that will be sustainable for the future. There needs to be a shared understanding that the money currently locked in the journal subscription system must be withdrawn and re-purposed for open access publishing services. The current library acquisition budgets are the ultimate reservoir for enabling the transformation without financial or other risks. The goal is to preserve the established service levels provided by publishers that are still requested by researchers, while redefining and reorganizing the necessary payment streams. By disrupting the underlying business model, the viability of journal publishing can be preserved and put on a solid footing for the scholarly developments of the future.

Science annual articles calculation

journal subscription spending	EUR 7.6 billion
f Science listed articles only	1.5 million papers
ated expenses per article (rounded)	**EUR 5,000**

nnual articles calculation

journal subscription spending	EUR 7.6 billion
stimated articles output	2.0 million papers
ated expenses per article (rounded)	**EUR 3,800**

1

the current subscription system, a figure between EUR 3,800 and 5,000 is already being er research article through library subscription spending.

For the publishing year 2013, this breakdown shows the following cost distribution for each of the three countries in our example:

- For **Germany**, we can identify 70,000 APC-relevant papers of a total of 103,000 research articles and reviews listed in the Web of Science. Multiplied by our assumed EUR 2,000 average APC price, the expected open access expenditure for Germany in 2013 would have been in the region of EUR 140 million. There are no consolidated figures for the country-wide subscription spending for scientific journals, but experts project these costs to be well beyond EUR 200 million per year. So Germany should be in a position to organize a large-scale open access transformation without much pain.
- For the **United Kingdom**, we can identify 72,000 APC-relevant papers of a total of 109,000 research articles and reviews listed in the Web of Science. Multiplied by our assumed EUR 2,000 average APC price, the expected open access expenditure for the UK in 2013 would have been in the region of EUR 144 million. Estimates of what the UK's higher education institutions are paying for their journal subscriptions vary from £160 million per year (according to Jisc Collections) to £192 million (according to Research Libraries UK): that is, between EUR 218 and 260 million. So for the UK, too, we have a clear picture that a comprehensive open access transformation could be done without financial stress.
- For **France**, we can identify 46,000 APC-relevant papers of a total of 71,000 research articles and reviews listed in the Web of Science. Multiplied by our assumed EUR 2,000 average APC price, the expected open access expenditure for France in 2013 would have been in the region of EUR 92 million. According to conservative estimates, it is assumed that the French academic sector is paying at least EUR 120 million per year for their subscriptions to scientific journals. So, like Germany and the UK, France need to anticipate no difficulties in preparing for an open access transformation.

But APC pre-exists to open access and open access exists without APC

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www.mdpi.com/journal/publications

Article

Open Access Article Processing Charges: DOAJ Survey May 2014

Heather Morrison *, Jihane Salhab, Alexis Calvé-Genest and Tony Horava

School of Information Studies, University of Ottawa, 111-02 55 Laurier E., Ottawa ON K1N 6N5, Canada; E-Mails: jderg011@uottawa.ca (J.S.); acalv018@uottawa.ca (A.C.-G.); thorava@uottawa.ca (T.H.)

* Author to whom correspondence should be addressed; E-Mail: Heather.Morrison@uottawa.ca; Tel.: +1-613-562-5800 (ext. 7634).

Academic Editor: Björn Brembs

Received: 7 November 2014 / Accepted: 29 January 2015 / Published: 5 February 2015

Abstract: As of May 2014, the Directory of Open Access Journals (DOAJ) listed close to ten thousand fully open access, peer reviewed, scholarly journals. Most of these journals do not charge article processing charges (APCs). This article reports the results of a survey of the 2567 journals, or 26% of journals listed in DOAJ, that do have APCs based on a sample of 1432 of these journals. Results indicate a volatile sector that would make future APCs difficult to predict for budgeting purposes. DOAJ and publisher title lists often did not closely match. A number of journals were found on examination not to have APCs. A

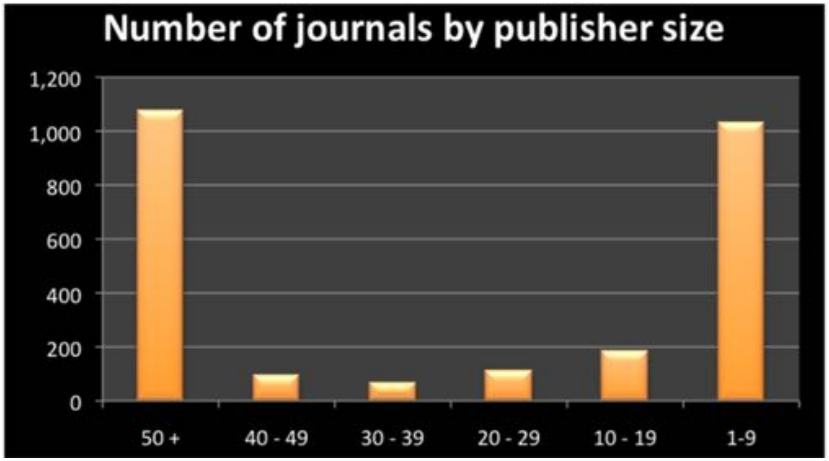
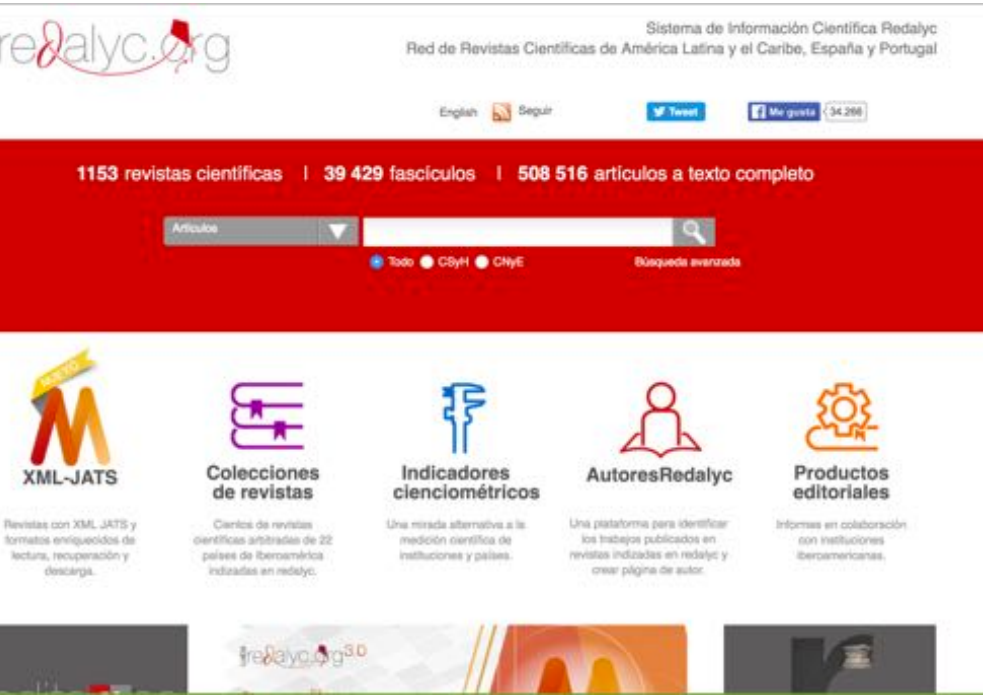


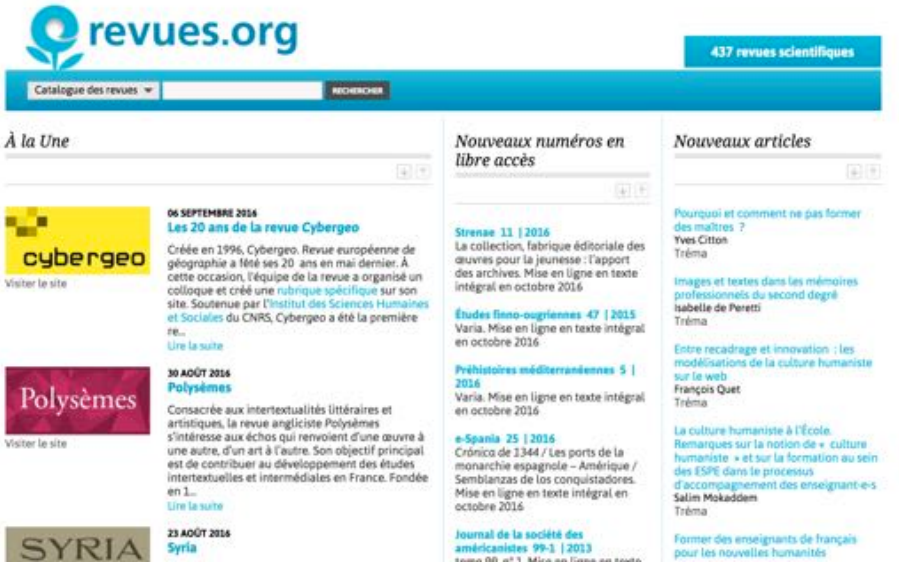
Table 2. Publishers by type.

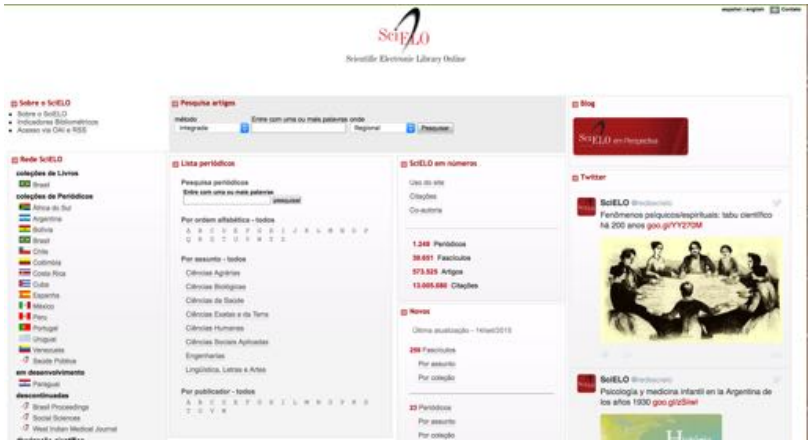
Publishers by Type	Number	Adjusted for Sampling Factor	Percentage of Total by Sampling Factor
commercial	1246	1567	61%
university	36	276	11%
unknown	31	197	8%
.com	45	185	7%
society	13	110	4%
.org	22	106	4%
not-for-profit	27	52	2%
university/society	5	37	1%
university/commercial	2	16	1%
government	2	11	0%
government/society	1	10	0%
.org/university	2	6	0%
Total	1432	2573 *	100% **

OA business models in the humanities and social sciences

The invisible rise of institution supported journals







PKP

PUBLIC KNOWLEDGE PROJECT

Software Research Community Services Support

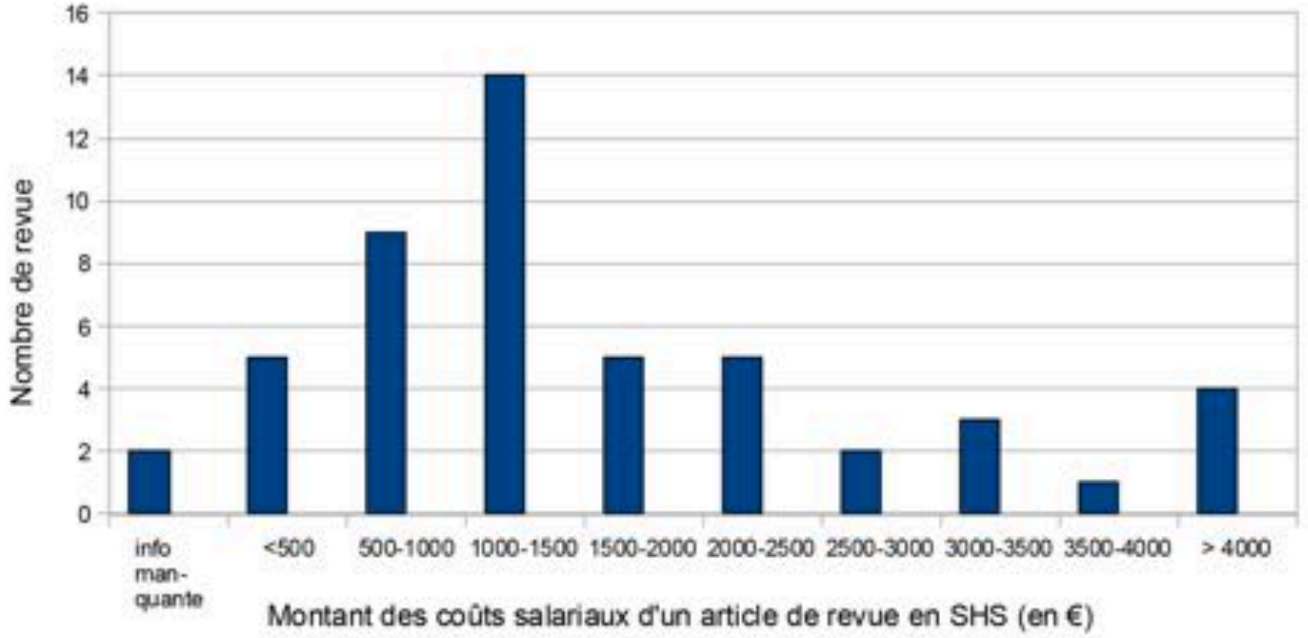
PKP is a multi-university initiative developing (free) open source software and conducting research to improve the quality and reach of scholarly publishing

OJS Map

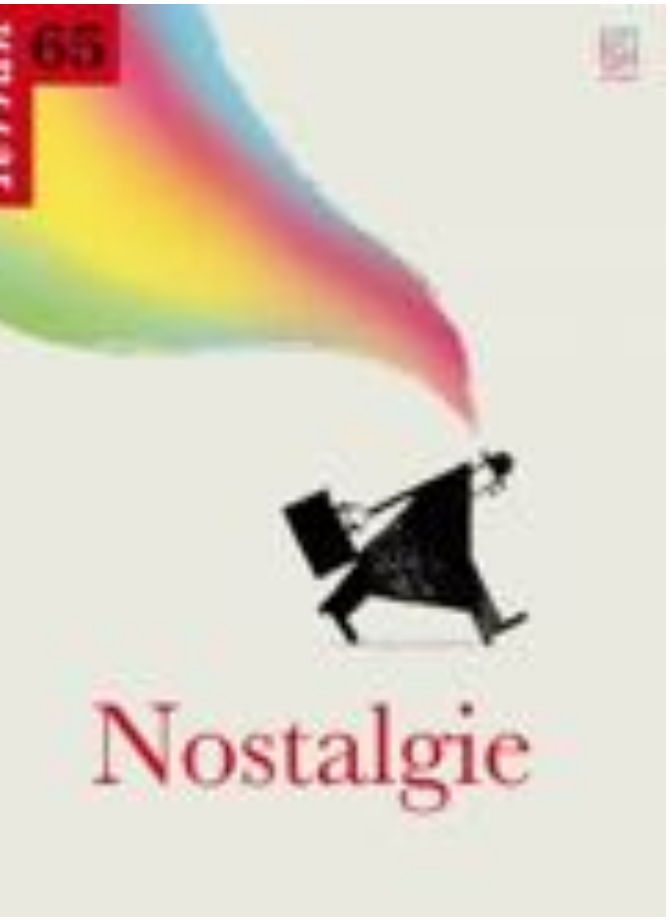
The cost of an article

En tenant compte de ce montant des coûts salariaux, le coût médian d'un article de revue en SHS est de 1 330 euros (coût minimum 500 et maximum 4 000).

- 2 revues pour lesquelles nous n'avons pas l'info ;
- 5 revues en dessous de 500 € l'article ;
- 9 revues entre 500 € et 1 000 € l'article ;
- 14 revues entre 1 000 € et 1 500 € l'article ;
- 5 revues entre 1 500 € et 2 000 € l'article ;
- 5 revues entre 2 000 € et 2 500 € l'article
- 2 revues entre 2 500 € et 3 000 € l'article ;
- 3 revues entre 3 000 € et 3 500 € l'article ;
- 1 revues entre 3 500 € et 4 000 € l'article ;
- 4 au-dessus de 4 000 €.



Weakness of the institutional support model



ulti-
stitutional
pport is
etter : the
xample of HAU
urnal

U-N.E.T.

N.E.T., or the HAU Network of Ethnographic Theory, is an international rk of research centres and anthropology departments working together to support s flagship journal and its innovative book series.

N.E.T. offers an alternative to existing subscription models in publishing. It is on the contention that the best way to support an open access, non-profit ve in anthropology is to bypass the logic and institutions of the contemporary ation regime through the establishment of a network of collaborating centers that sion and further an open access publishing press and its prospects.

same way as the HAU takes advantage of the opportunity to bring about es in academic publishing through its engagement with the digital revolution, N.E.T seeks to build on ever growing advances in communications technology to hift how we think about anthropology, how we conduct it, and how we may ue to shape it as a discipline of global exchange.

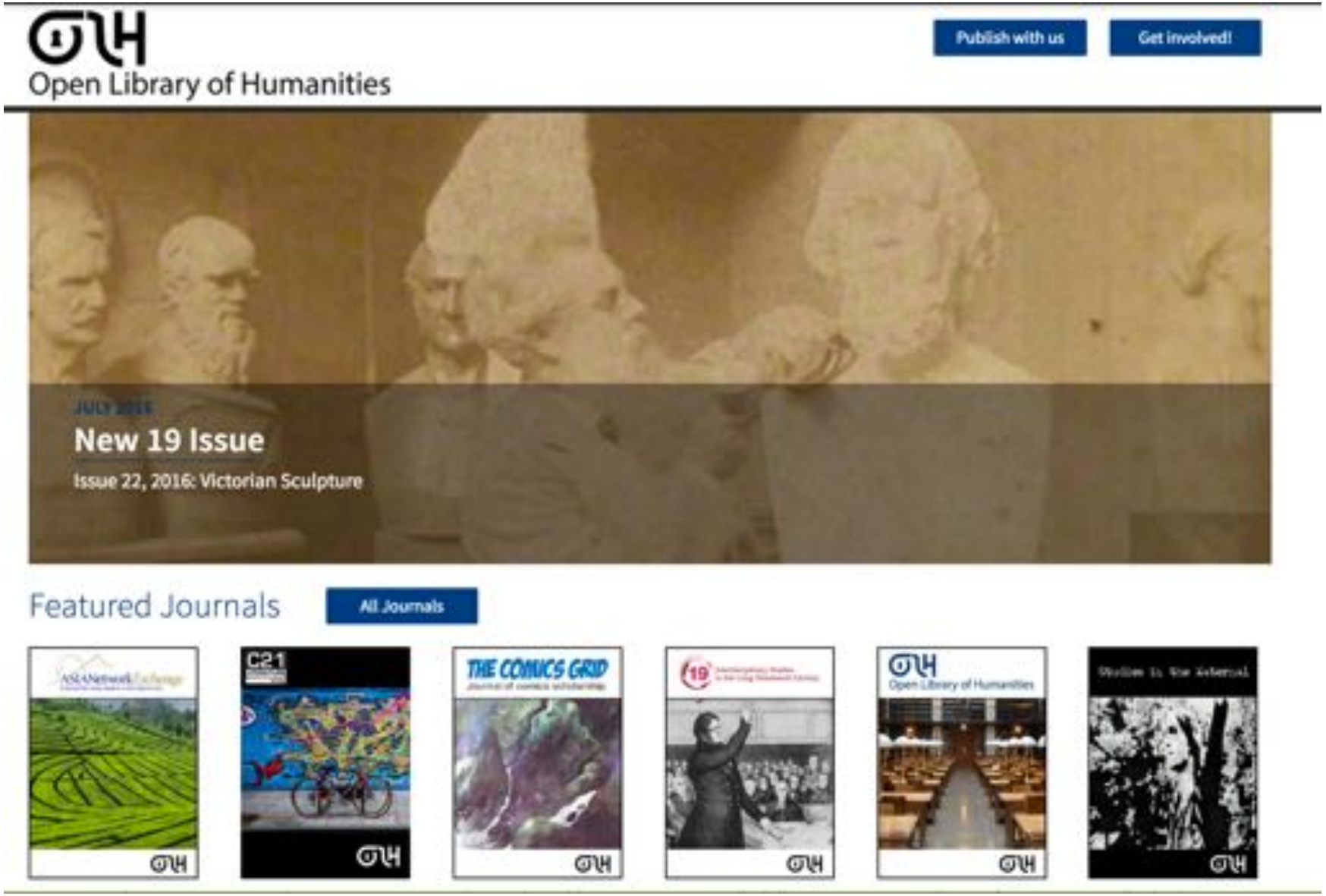
N.E.T. marks a break from institutional models of affiliation, existing as a shared rise with nodes distributed across universities, libraries, and research institutions eral different countries. These nodes participate in the development of HAU h their editorial advice, their suggestions for reprints and translations, and their g and organizing of workshops, seminars, and other initiatives. Each node of N.E.T. selects a local representative to sit on HAU's External Adivsory Board en liaises between the local network and HAU's Editorial Team.

sed HAU-N.E.T. events include academic conferences and workshops based on s in ethnographic theory, masterclasses and guest lectures, discussion groups and n-progress seminars. Visiting fellowships between member institutions are ed, and the support of member institutions will be sought in applications made ernational collaboration grants to fund these and other network activities.

Currently, HAU-N.E.T. consists of the following institutions:

- University of Aarhus (DK) – EPICENTER: The Centre for Cultural Epidemics
- University of Amsterdam (NL) – Department of Sociology and Anthropology
- Australian National University (AU) - Library
- University of Bergen (NO) – Department of Social Anthropology
- Brown University (US) – Department of Anthropology and Library
- California Institute of Integral Studies (US) – Department of Anthropology and Social Change
- University of Campinas (BR) – Graduate Program in Social Anthropology
- University of Canterbury (NZ) – Department of Anthropology
- University of Chicago (US) – Department of Anthropology
- University College London (UK) – Department of Anthropology
- University of Colorado Boulder Libraries (US)
- Cornell University (US) – Department of Anthropology
- University of Edinburgh (UK) – Department of Anthropology
- The Graduate Institute, Geneva Library (CH)
- University of Groningen (NL) – Department of the Comparative Study of Religion and the University of Groningen Library
- University of Helsinki (FL) – Faculty of Social Sciences, Social and Cultural Anthropology
- Indiana University Library (US)
- Johns Hopkins University (US) – Department of Anthropology
- University of Kent (UK) – Department of Social Anthropology
- Lafayette College Library (US)
- London School of Economics and Political Science (UK) – Department of Anthropology and Library
- Institute of Social Sciences of the University of Lisbon (PL)
- The University of Manchester Library (UK)
- Massachusettes Institute of Technology (US) – Department of Anthropology and MIT Libraries
- Max-Planck Institute for the Study of Religious and Ethnic Diversity at Göttingen (Library) (DE)
- musée du quai Branly – Jacques Chirac (FR)
- Museu Nacional - UFRJ (BR) - Department of Anthropology
- Pontificia Universidad Católica de Chile (CL) - Department of Anthropology
- Princeton University (US) – Department of Anthropology
- University of Queensland (AU) – Department of Anthropology
- University of Oslo (NO) – Department of Social Anthropology
- University of Oslo Library (NO)
- University of Rochester (US) – Department of Anthropology
- Universidad Autónoma de San Luis Potosi (MX) – School of Social Sciences and Humanities
- SOAS, University of London (UK) – Department of Anthropology and Sociology
- University of Sydney (AU) – Department of Anthropology
- University of Toronto Libraries (CA)

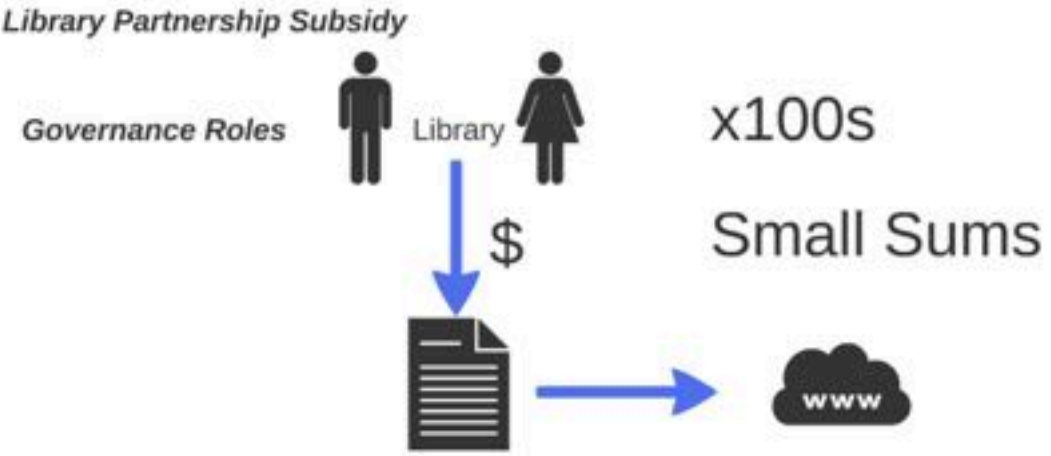
Support from libraries: the example of OLH



Vhat's innovative and how is it funded?

he current level of Article Processing Charges makes gold OA ublishing unaffordable for the majority of unfunded humanities cholars. The OLH aims instead to implement a collaborative, or ollective, funding model for gold open access in the humanities.

Lots of libraries all paying a small amount to make it work.



Vhen many libraries band together, it becomes possible to support rge-scale open access infrastructures at a far cheaper rate when ompared with closed access subscription mechanisms and direct rticle processing charges.

What do contributors receive?

All contributing libraries/individuals are given a place on the O Library Board, which will consult with the OLH Academic Board the future admission of overlay journals and ot governance/budgetary decisions.

How much does it cost?

Compared to other publishers: **very little.**

For 250 articles:

Number of Libraries	Contribution per Library per Year (USD)	Cost per Article per Institution
400	**$462**	**$1.84**
350	$528	$2.11
300	$616	$2.46
250	$740	$2.96
200	**$925**	**$3.70**
180	$1,027	$4.10
160	$1,156	$4.62
140	$1,321	$5.28
120	$1,541	$6.16
100	**$1,850**	**$7.40**

Freemium model for journals. The example of OpenEdition

Freemium : a business model to address 3 challenges

- To increase **sustainability** for Open Access publications
- To set up a business model adapted to specific needs of **humanities and social sciences** scholarly communication
- To increase **impact** of Open Access publications in libraries

Freemium

- « Freemium is a business model by which a product or service is provided free of charge, but money (premium) is charged for advanced features, functionality, or virtual goods. The word "freemium" is a portmanteau neologism combining the two aspects of the business model: "free" and "premium" »

Freemium : a common business model in the digital world

Freemium : from libraries for publishers

- Open Access on the Web (html) – *free* –
- Pdf and epub download and other services licensed to libraries – *premium* –
- 66% of income for books and journals publishers
- Partnership with libraries consortia : Couperin, Crepuq, CIFNAL

OpenEdition
Freemium

Open Access

Copy/Paste, Print, Save,…

Premium

No DRM

No Download quotas

A comprehensive set of 8 premium Services

1. Ethical Open Access

- Freemium is a contribution to OA
- HTML for ALL !
- Transparency
- 66% of income going to publishers
- Users committee

2. Exclusive access to formats

- ePub
- PDF
- Reader

3. Dashboard

- Counter statistics (*daily*)
- Logs statistics (*daily*)
- Coverage lists (*daily*)

4. Data services

- Full text *via* OAI-PMH
- Search results in XML
- MARC21 – UNIMARC
- ONIX
- Calenda Webservice
- ISBN resolver
- Dublin Core by URL resolution

5. Discovery services

- Inclusion in major discovery tools with Kbart
- Unlimited alerts
- Bookserver for mobile users
- Crosslinking via DOI (textmining)

6. Permanent access

- Permanent access for Books and Journals
- CLOCKSS
- Long term archival (CINES)

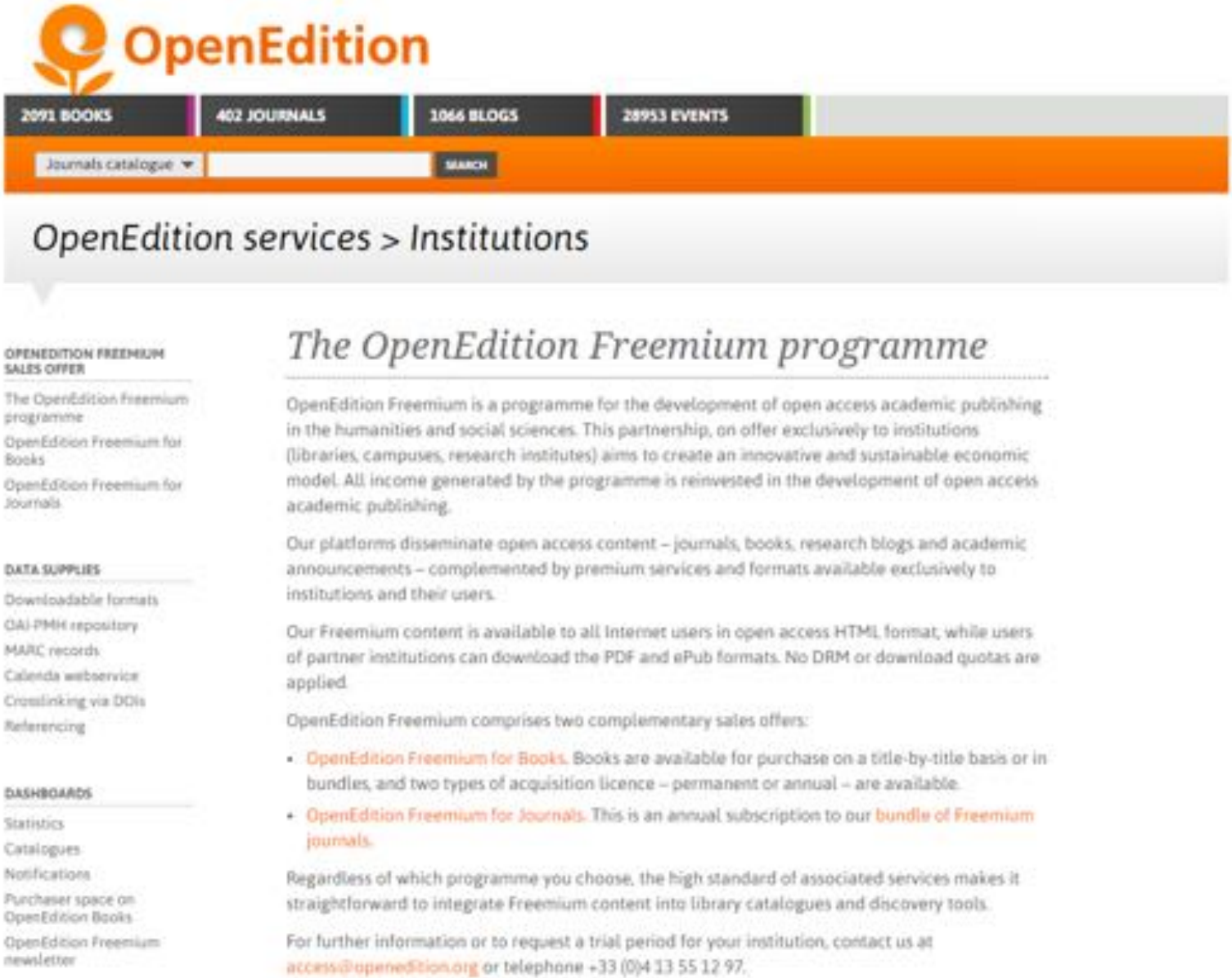
7. Hotline and training

- Hotline
- Training on demand
- Documentation for users

8. Branding

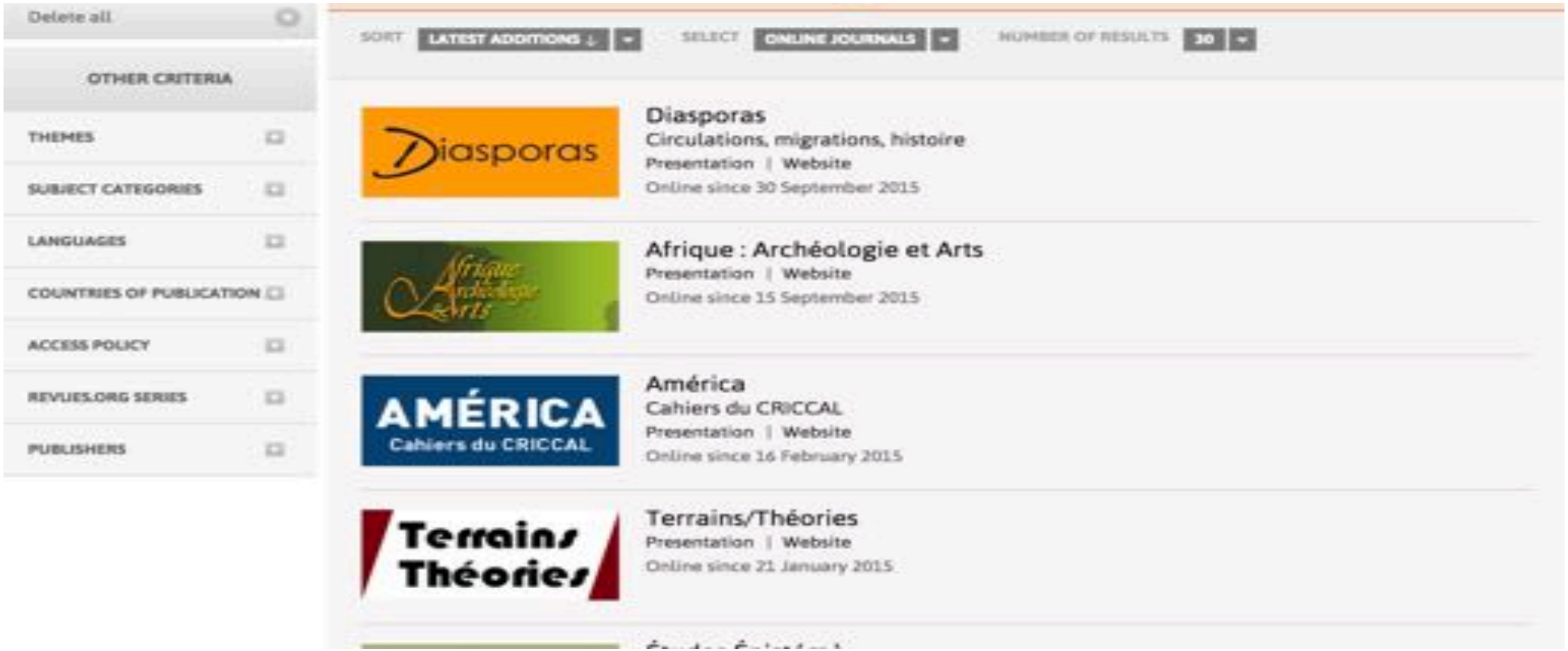
- Library name and logo on OpenEdition homepage and navigation bar
- Library name and logo on HTML, Epub, PDF

Results after 4 years of production

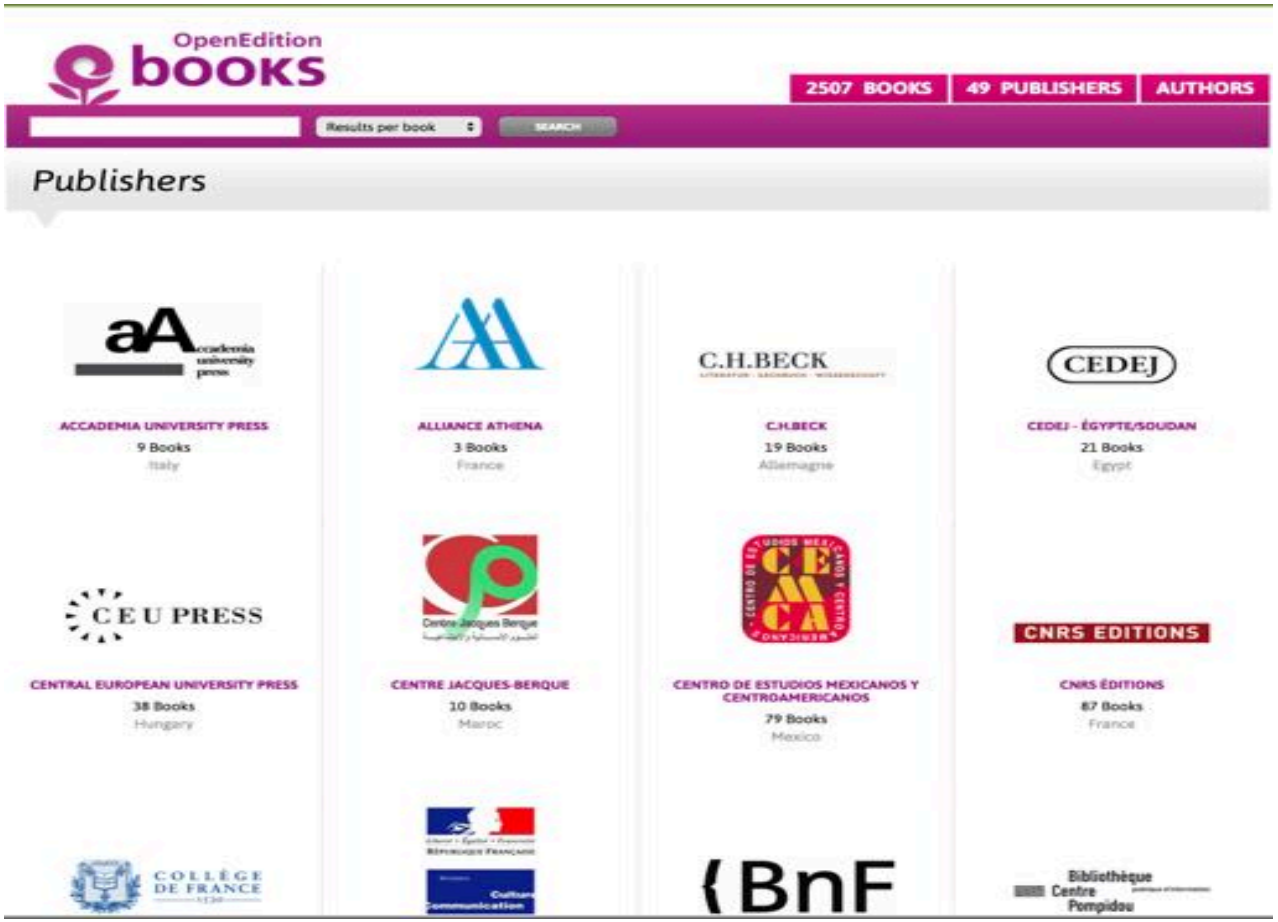


http://www.openedition.org/14043?lang=en

150 journals in OE Freemium



50 publishers of books in OE Freemium

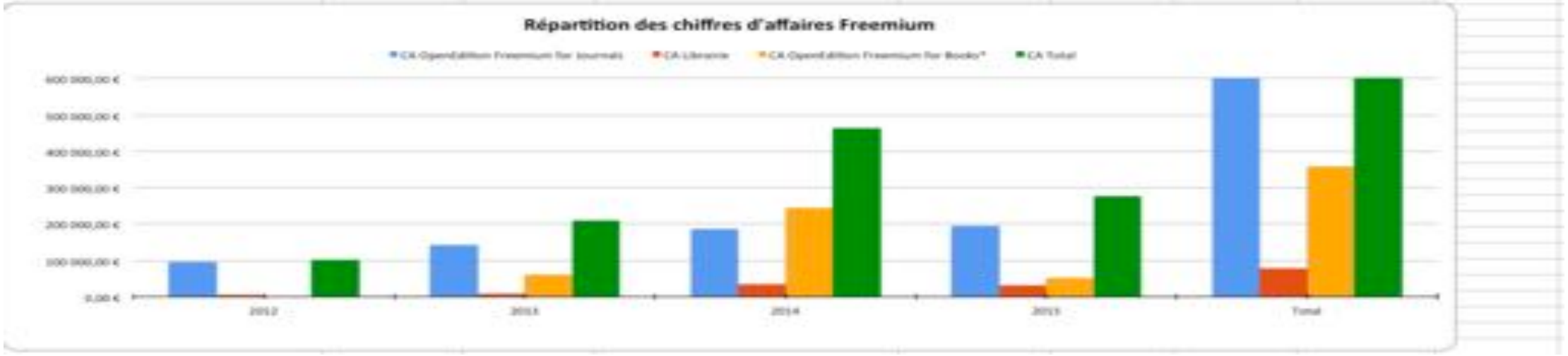


More than 110 subscribing libraries

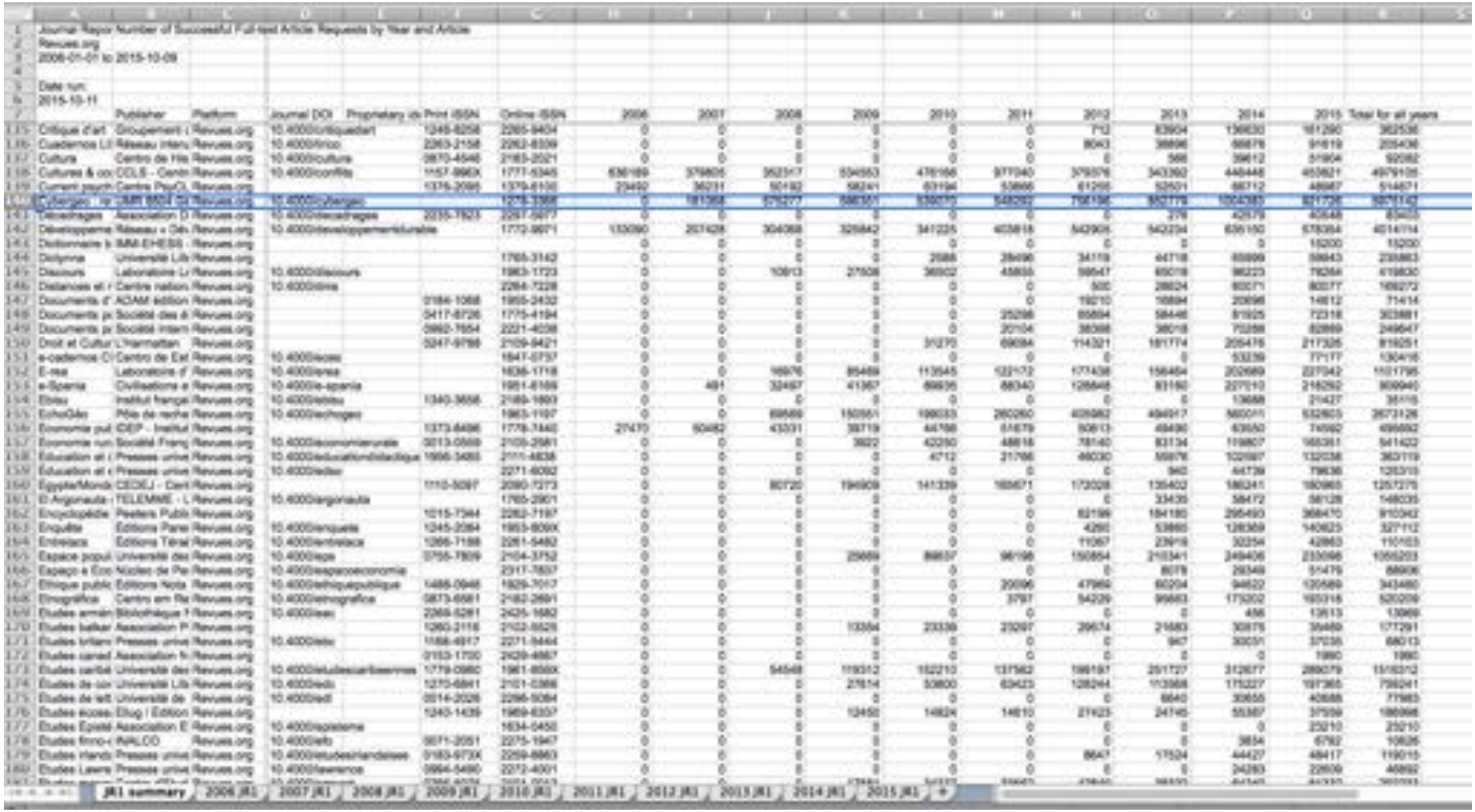
- **Most recent subscribers** : Kuwait University Library,The Faculty of Arts and Humanities – University of Porto, U.C. Berkeley U. Stanford U. Columbia U. Cornell U. Yale U. Illinois, Bryn Mawr College

Revenues

Total des CA OpenEdition Freemium depuis 2012	1 651 367,17 €		Total des revenus Freemium éditeurs depuis 2012	687 422,77 €	Total des revenus Freemium OpenEdition depuis 2012	339 499,49 €



Usage



Journal Report Number of Successful Full-text Article Requests by Year and Article

Revues.org

2006-01-01 to 2015-10-09

Date run:
2015-10-11

	Publisher	Platform	Journal DOI	Proprietary ide	Print ISSN	Online ISSN	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	Total for all years
Critique d'art	Groupement i	Revues.org	10.4000/critiquedart		1245-8258	2265-8404	0	0	0	0	0	0	712	83904	136930	161290	382536
Cuadernos Li	Réseau interu	Revues.org	10.4000/trico		2263-2158	2262-8339	0	0	0	0	0	0	8043	38696	66878	91619	205436
Cultura	Centro de His	Revues.org	10.4000/cultura		0870-4546	2183-2021	0	0	0	0	0	0	0	566	39612	51904	92082
Cultures & co	CCLS - Centr	Revues.org	10.4000/conflits		1157-866X	1777-5345	636189	379805	362517	534553	478166	377340	379376	343392	448446	453821	4979105
Current psych	Centre PsyCl	Revues.org			1376-2095	1579-8100	23492	36231	50182	58241	63194	53866	61205	52501	68712	48687	514671
Cybergeo : re	UMR 8504 Ge	Revues.org	10.4000/cybergeo			1278-3366	0	181368	575277	586551	559075	549282	798196	862778	1004585	921726	5937142
Développemer	Association D	Revues.org	10.4000/developpementdurable		2235-7823	2267-9977	0	0	0	0	0	0	0	276	42579	40648	83503
Développemer	Réseau « Dév	Revues.org	10.4000/developpementdurable			1772-9971	133090	207428	304068	326842	341235	403818	542906	542234	636150	678364	4014194
Dictionnaire b	IMM-EHESS -	Revues.org					0	0	0	0	0	0	0	0	0	16200	16200
Diotyme	Université Lib	Revues.org				1765-3142	0	0	0	2588	28498	34119	64718	65899	56843	230883	
Discours	Laboratoire Li	Revues.org	10.4000/discours			1963-1723	0	0	10813	27508	36902	45855	59647	65078	96223	78264	419830
Distances et r	Centre nation	Revues.org	10.4000/dms			2264-7228	0	0	0	0	0	0	500	28824	60071	80077	169272
Documents d'	ADAM édition	Revues.org			0184-1068	1955-2432	0	0	0	0	0	0	19210	16894	20698	14812	71414
Documents pa	Société des ét	Revues.org			0417-8726	1775-4194	0	0	0	0	0	25298	85894	58446	81925	72318	323881
Documents pa	Société intern	Revues.org			0992-7654	2221-4038	0	0	0	0	0	20104	38098	38018	70258	62869	249647
Droit et Cultur	L'Harmattan	Revues.org			0247-9788	2109-9421	0	0	0	0	31270	69084	114321	181774	205476	217326	819251
e-cadernos CI	Centro de Est	Revues.org	10.4000/ecea			1647-0737	0	0	0	0	0	0	0	0	53239	77177	130416
E-rea	Laboratoire d'	Revues.org	10.4000/erea			1638-1718	0	0	16976	85469	113545	122172	171438	158464	202689	227342	1107795
e-Spania	Civilisations e	Revues.org	10.4000/e-spania			1951-8188	0	491	32497	41367	69835	88040	128648	83160	227010	216292	869940
Ebisu	Institut franç	Revues.org	10.4000/ebisu		1340-3656	2189-1893	0	0	0	0	0	0	0	0	13688	21427	35115
EchoGéo	Pôle de recha	Revues.org	10.4000/echogeo			1963-1197	0	0	69569	150561	199033	260260	409582	494917	560041	532603	2673126
Economie pul	IDEP - Institut	Revues.org			1373-8486	1778-7440	27470	50482	43331	39719	44768	51679	50813	49490	63550	74592	496892
Economie rura	Société Franç	Revues.org	10.4000/economierurale		0013-0559	2105-2581	0	0	0	3822	42230	48818	78140	83134	119807	165351	541422
Education et (	Presses unive	Revues.org	10.4000/educationdidactique		1996-3483	2111-4838	0	0	0	0	4712	21766	46030	59976	102597	132038	363119
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Égypte/Monde	CEDEJ - Cent	Revues.org			1110-5097	2090-7273	0	0	80720	194909	141339	165671	173028	135402	186241	180965	1257375
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Encyclopédie	Peeters Publi	Revues.org			1015-7344	2262-7197	0	0	0	0	0	0	62199	184180	295493	368410	910282
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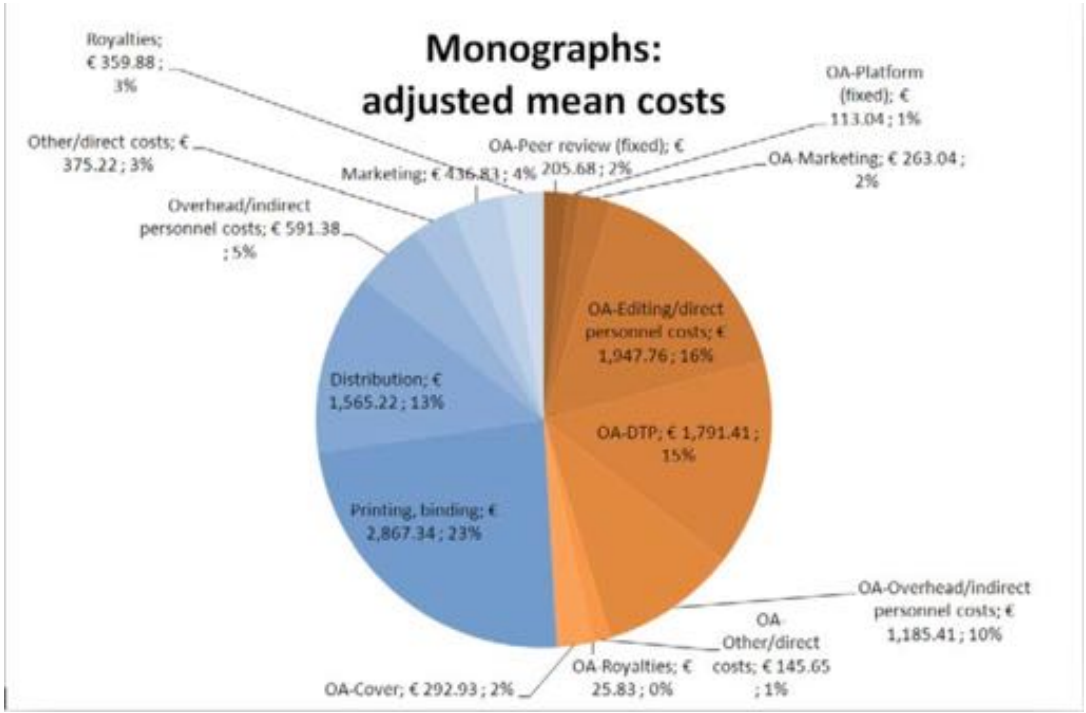
Études finno-u	INALCO	Revues.org	10.4000/efo		0071-2051	2275-1947	0	0	0	0	0	0	0	0	3834	6782	10625
Études irlande	Presses unive	Revues.org	10.4000/etudesirlandaises		0183-973X	2259-8863	0	0	0	0	0	0	8647	17524	44427	48417	119015
Études Lawre	Presses unive	Revues.org	10.4000/lawrence		0994-5490	2272-4001	0	0	0	0	0	0	0	0	24283	22609	46892

JR1 summary | 2006 JR1 | 2007 JR1 | 2008 JR1 | 2009 JR1 | 2010 JR1 | 2011 JR1 | 2012 JR1 | 2013 JR1 | 2014 JR1 | 2015 JR1 | +

The case of the books

Some fundamentals : Oapen reports



This model follows closely the analysis and divides the costs for monograph publishing in two Open Access costs and Print costs. The total costs are € 12,000, and 50% of these costs are Access expenses. If a funding council only wishes to subsidize the Open Access costs, the max grant would be € 6,000. This should cover the creation of the first digital copy plus the distril on an Open Access publication platform.

er words: the number of times a book was found in Google Books was positively affected by Access publishing.

e following table contains the descriptive data. The mean number of Book visits for books in Access is 755, while the mean number for the control group is 530. This is a large difference, will also be visible in the correlated number of pages viewed.

TABLE 7. Discovery descriptive data

	N	Mean	Std. Deviation	Std. Error	95% Confidence Interval for Mean		Minimum	Maximum
					Lower Bound	Upper Bound		
d access	221	530.45	862.049	57.988	416.17	644.73	1	4960
Access	462	755.70	676.954	31.495	693.81	817.59	2	3963
	683	682.81	748.737	28.650	626.56	739.07	1	4960

The following table contains the descriptive data. The mean number of books sold for boo Open Access is 8.67, while the mean number for the control group is 8.35. These figures are ir very close.

TABLE 6. Sales descriptive data

	N	Mean	Std. Deviation	Std. Error	95% Confidence Interval for Mean		Minimum	Maxi
					Lower Bound	Upper Bound		
Closed access	565	8.35	18.008	.758	6.86	9.84	-10	200
Open Access	803	8.67	20.640	.728	7.24	10.09	-10	272
Total	1368	8.54	19.590	.530	7.50	9.57	-10	272

London Economics Report

OA publishing functions

Figure 1: OA publishing functions

6 business models & 6 performance indicators

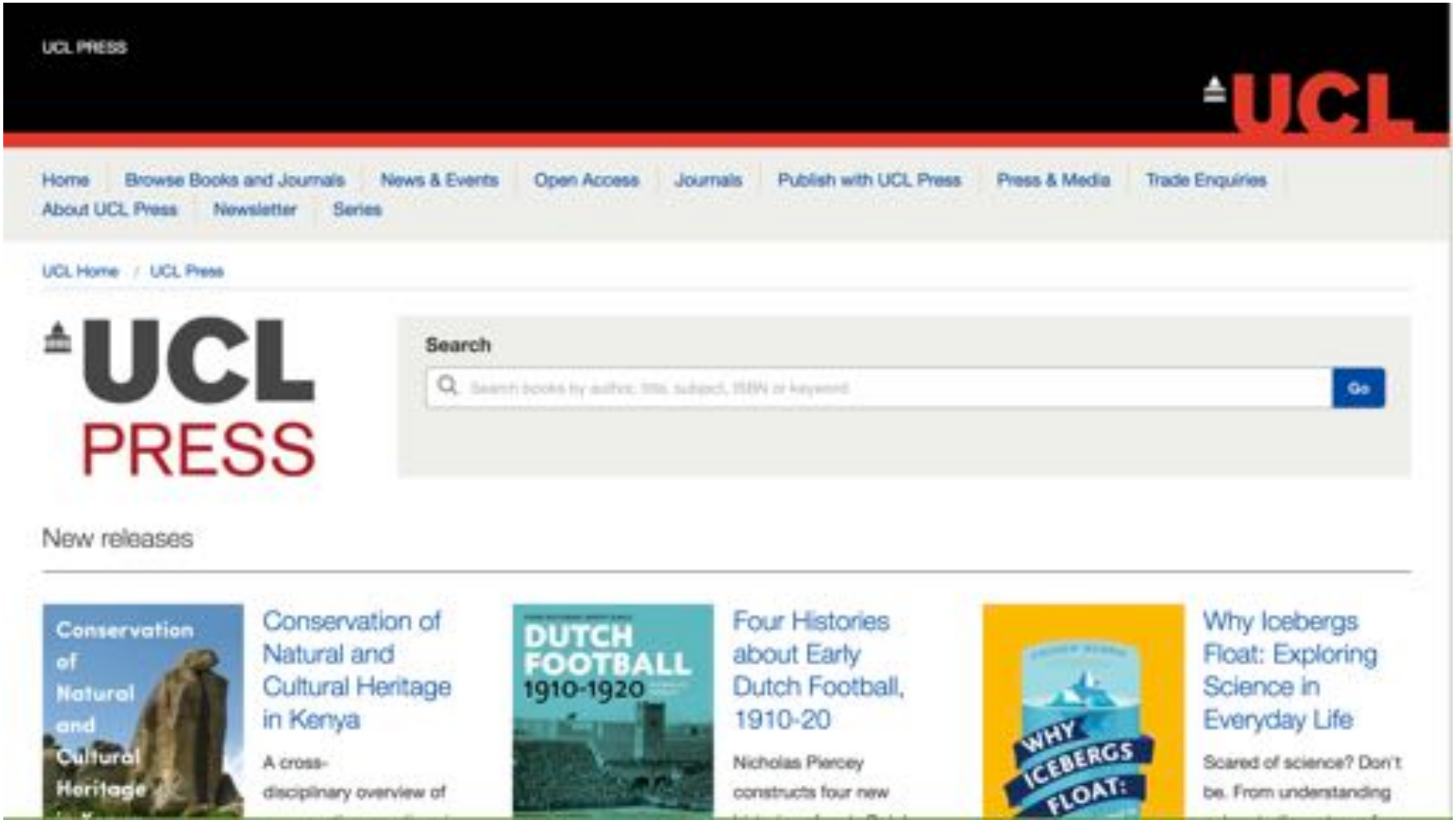
- traditional publisher;
- new university press;
- mission-oriented OA;
- freemium OA;
- aggregator/distributor
- author payment model.

- From an individual perspective
  - quality;
  - Sustainability;
  - dissemination.

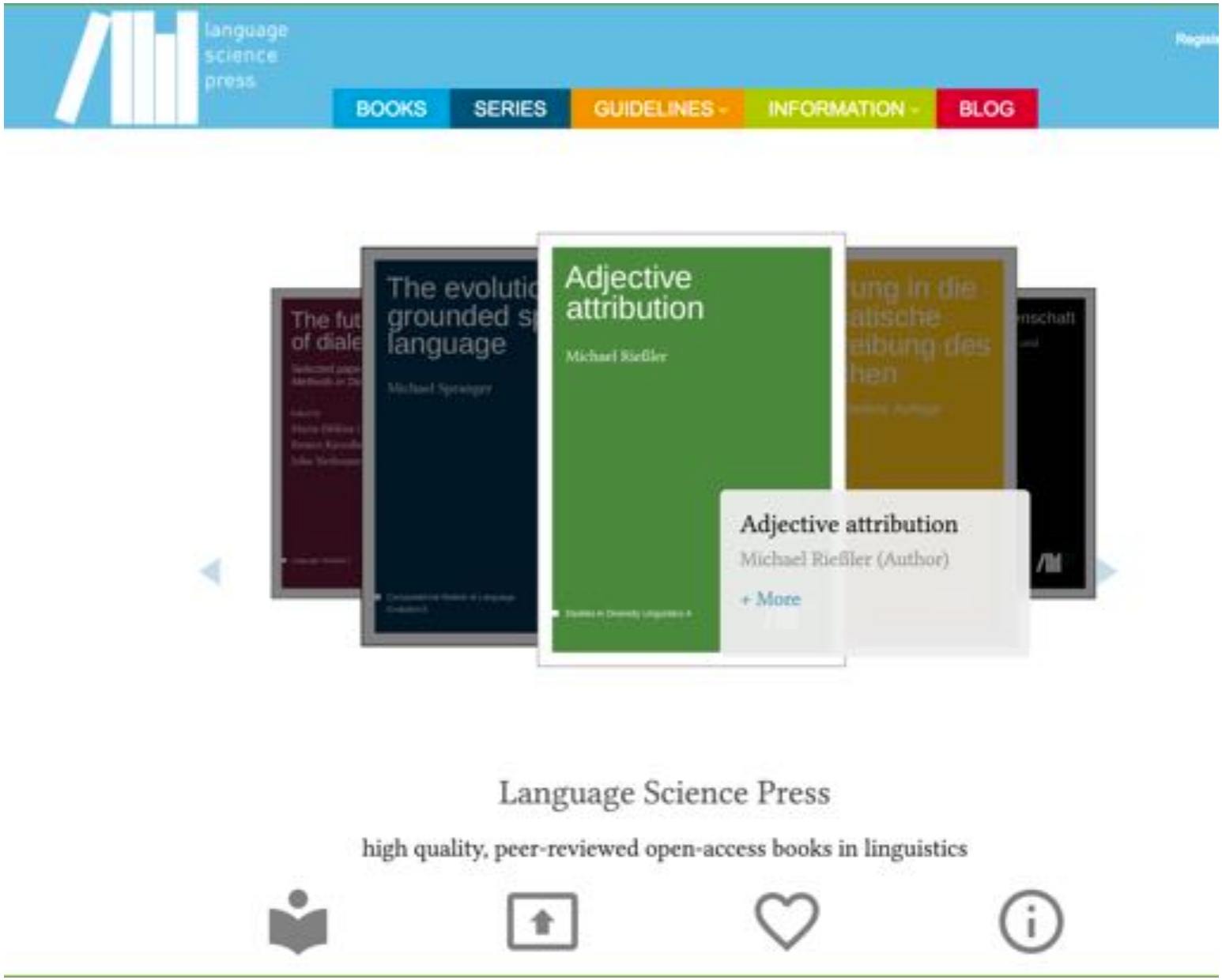
- From a system perspective
  - diversity;
  - innovation
  - integrity

Traditional publisher

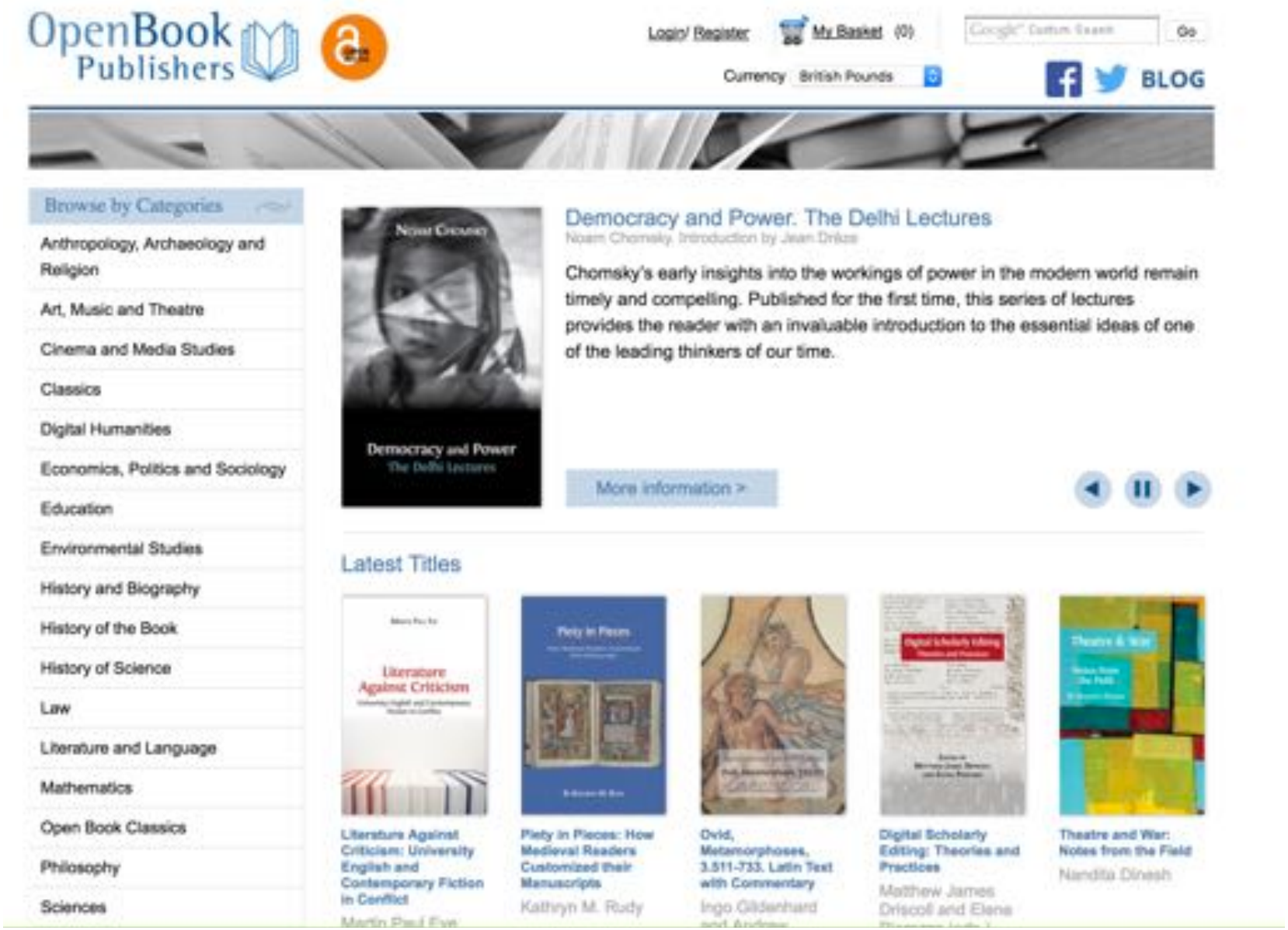
New University Presses



Mission oriented OA



Freemium OA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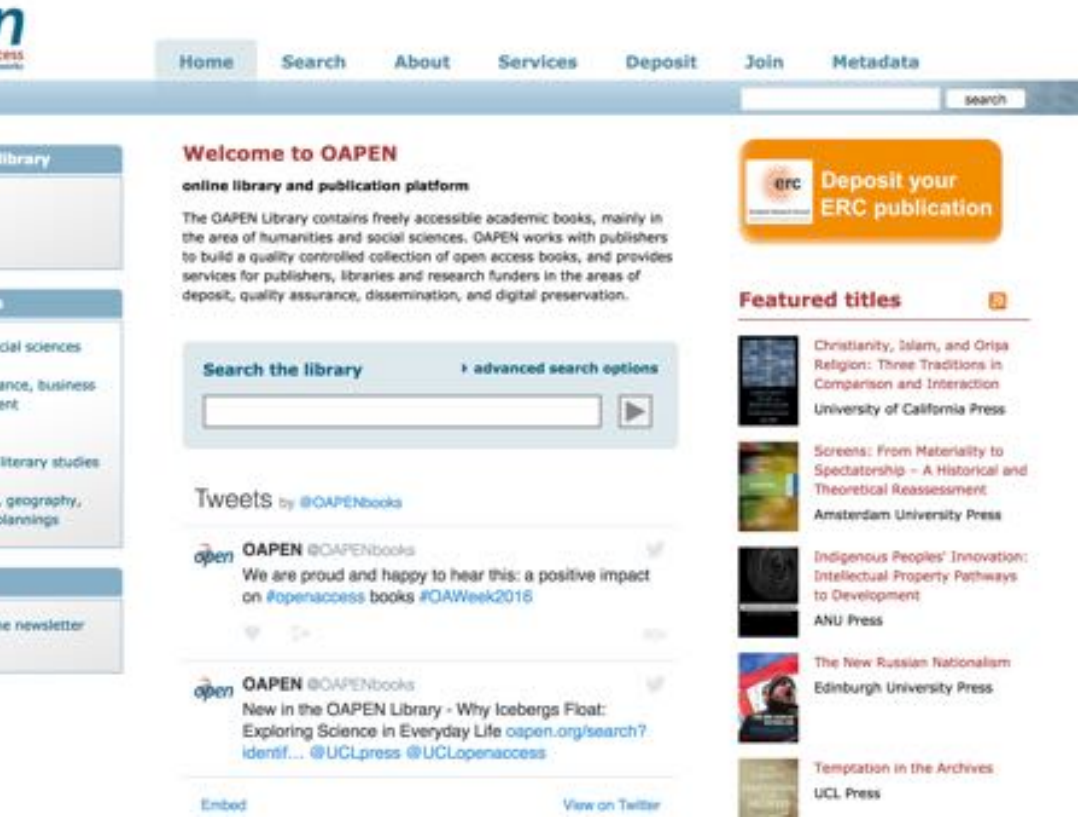

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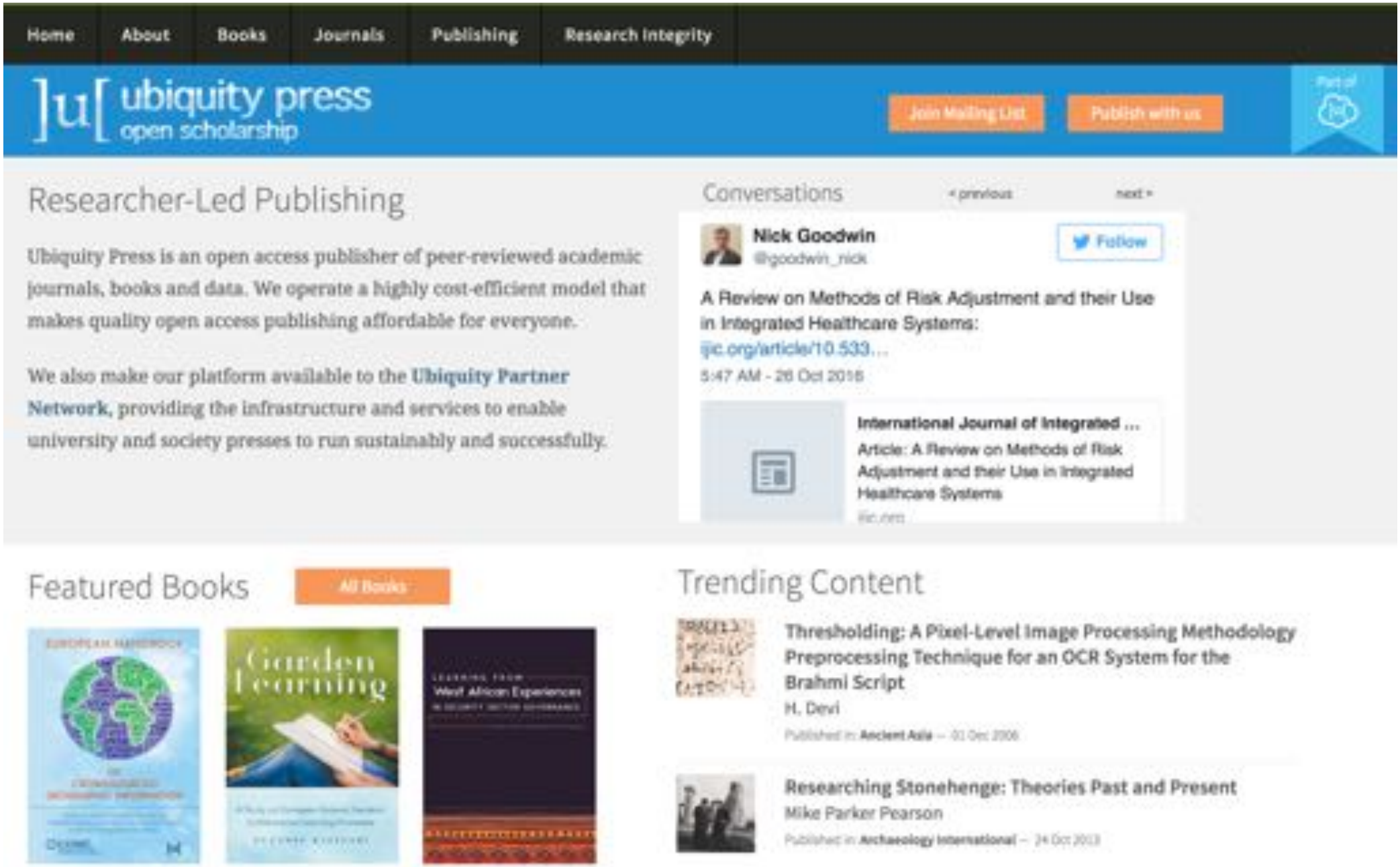

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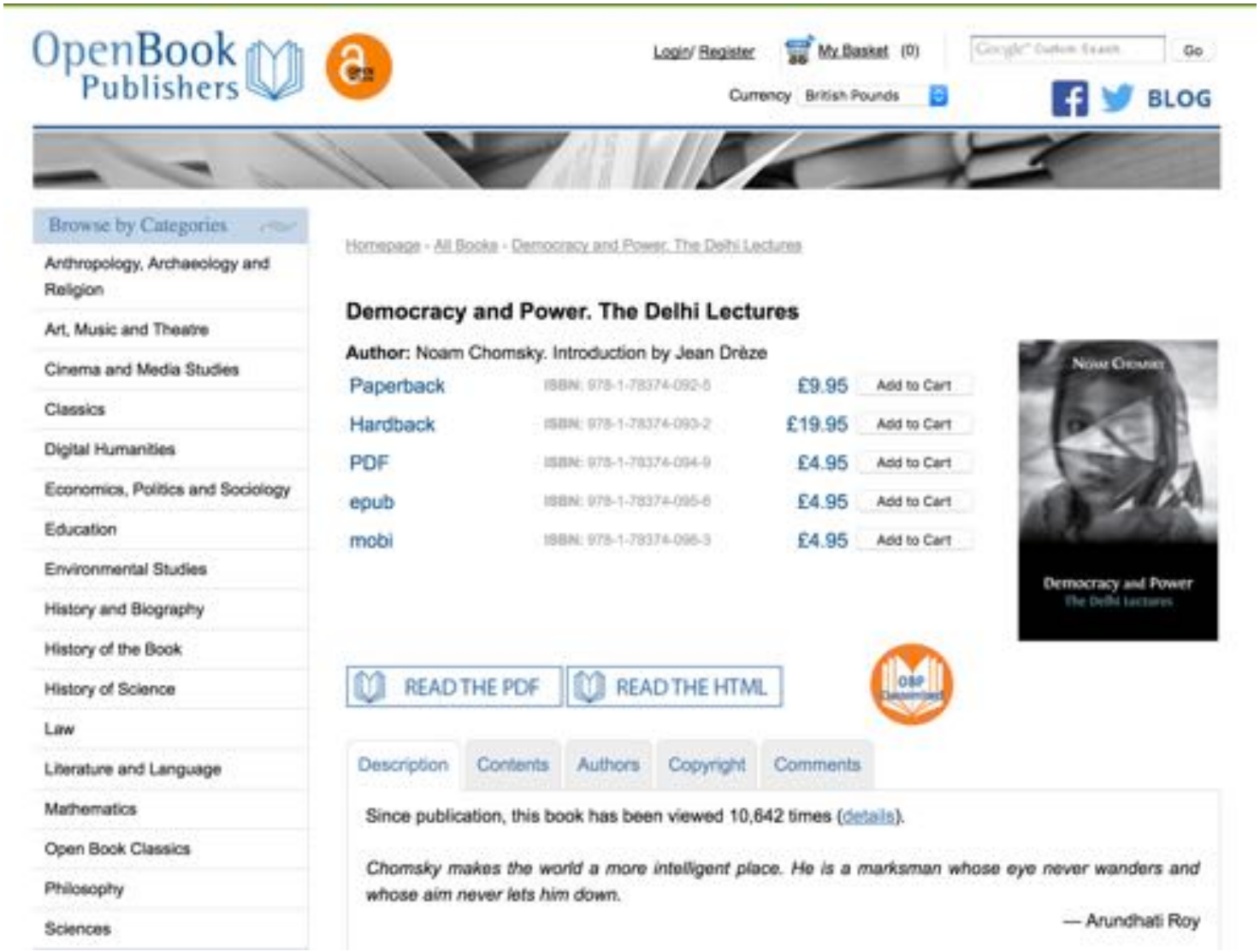
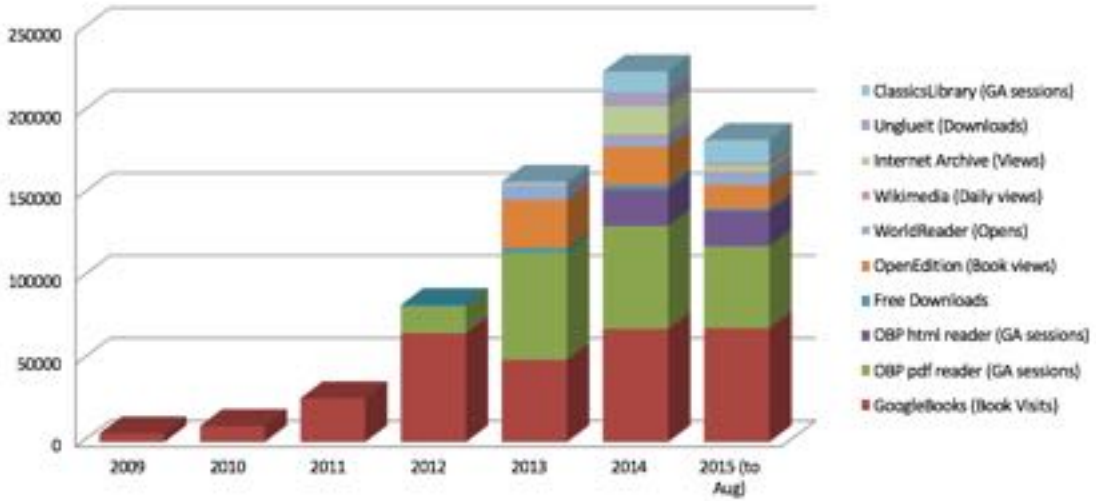


OBP Freemium

OBP Online Readers

by year and platform



Av readers per title, per month: Mean 425, Median 281

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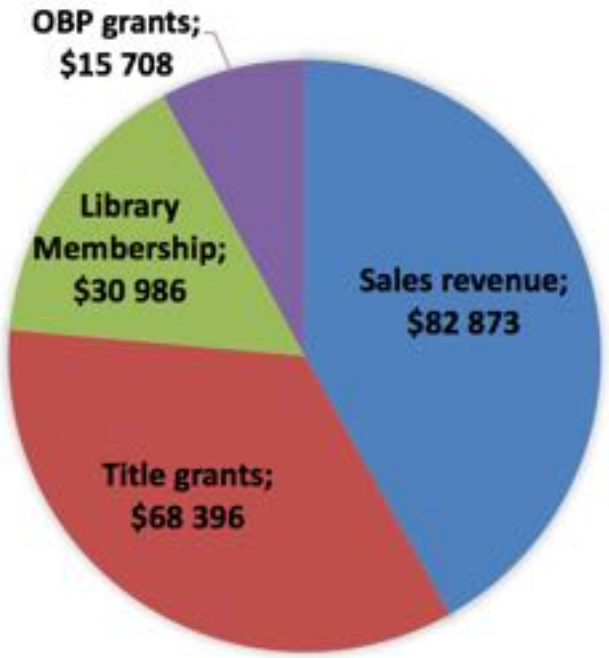

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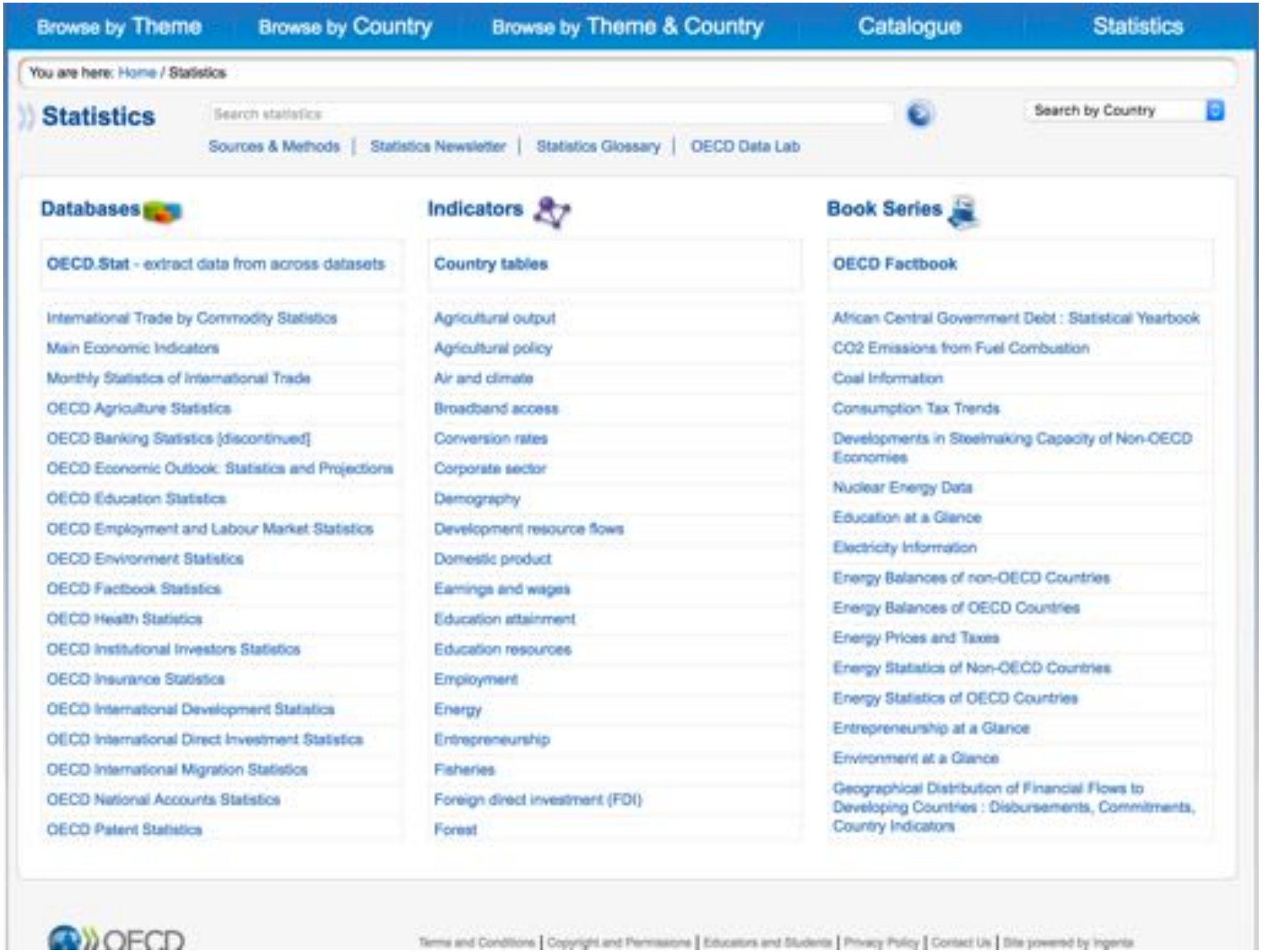
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- The Commonwealth iLibrary – Publications from The Commonwealth Secretariat now available via a separate subscription, and discoverable via Advanced Search.
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« It is a numbers game, so bust out your Excel spreadsheet. It's all about finding things in the margins — **lots of little things rather than one key thing.** »

D. Houston, Dropbox in « **Case Studies in Freemium: Pandora, Dropbox, Evernote, Automattic and MailChimp** », Gigaom, mars 2010

Diversification : the keyword for sustainable business models

And now, it’s up to you : what would be the best business model for your publications and data ?

Thanks!
pierre.mounier@openedition.org
@piotrr70
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