

STM FRANKFURT CONFERENCE 2017

What's Happening? Open Access

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10 October 2017

DELTA THINK

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What's Happening?

- The **Open Access** market
- The need for **Better Data**

About Delta Think

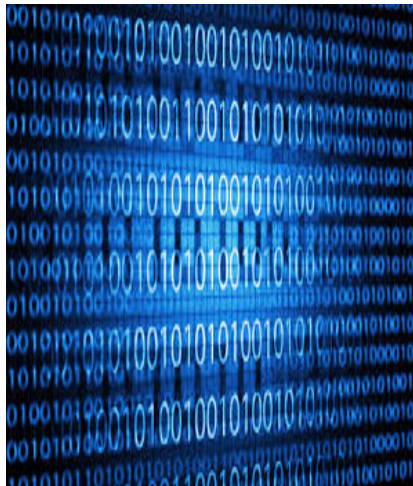
Founded in 2005

Scholarly Communications — Change Management

- Strategy
- Marketing Intelligence and Research
- Technology & Organizational Transition
- Business Data and Analytics



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DELTA THINK

Open Access Data & Analytics Tool

- **Centralised Data + Analytics**
- **Continuously updated**

- Public data sources
- Confidential Survey



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Survey

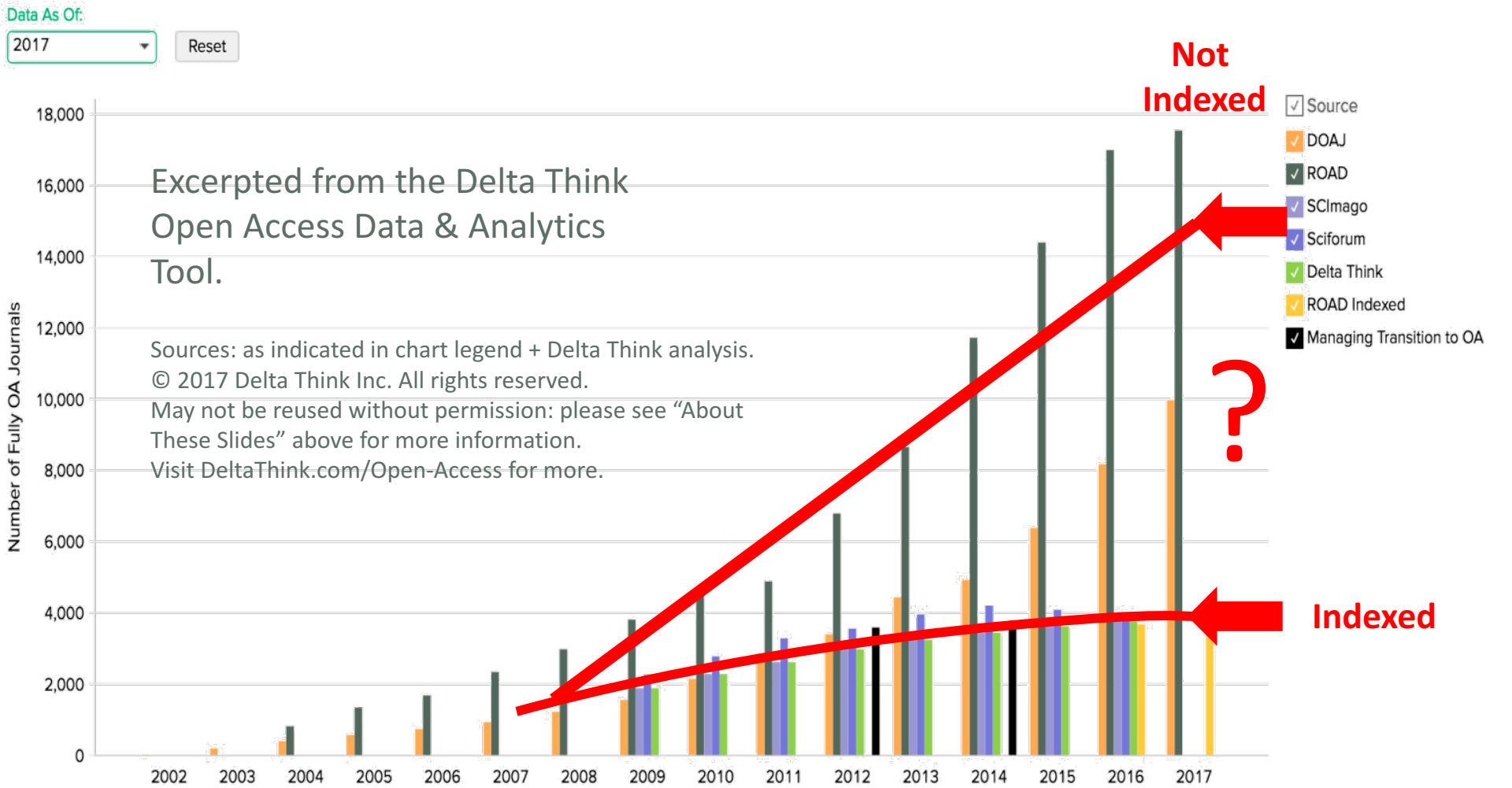
Private Data Stays Private

Averages, benchmarks only!

What's Happening

OA Market Dynamics

Fully OA Journals

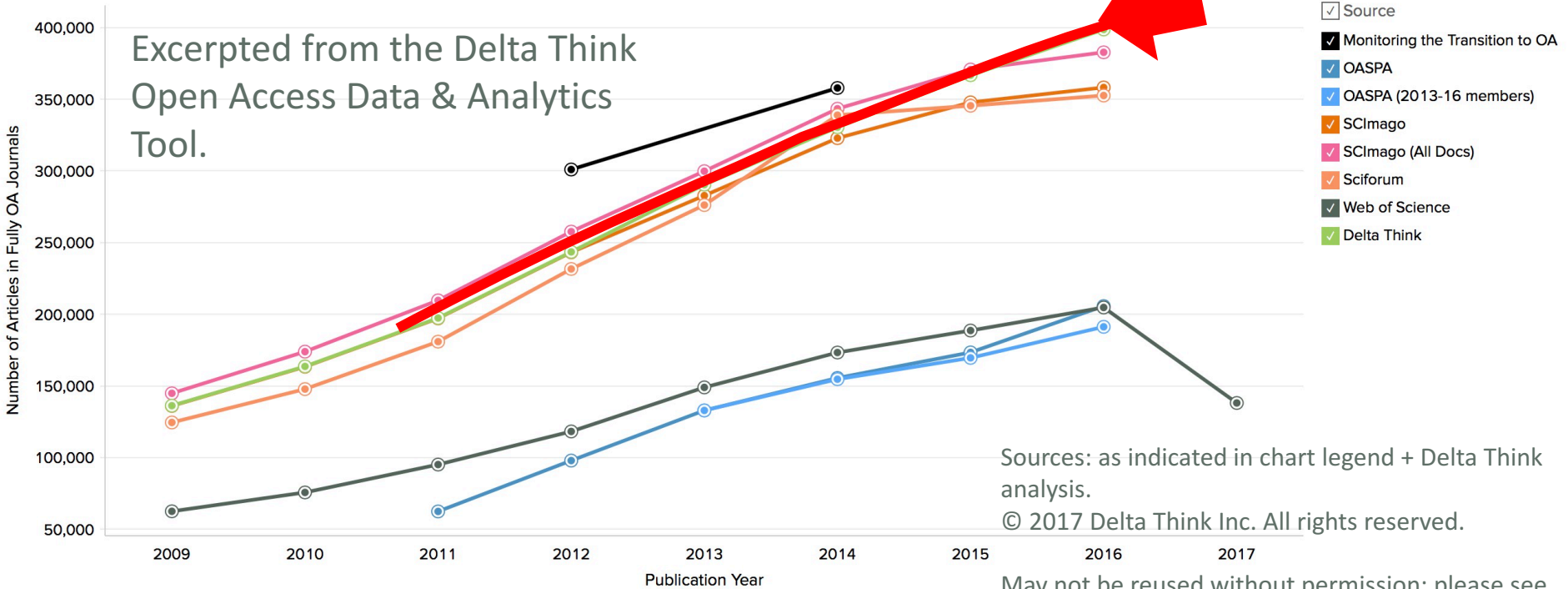


Articles in Fully OA Journals

Data As Of:

2017

Reset

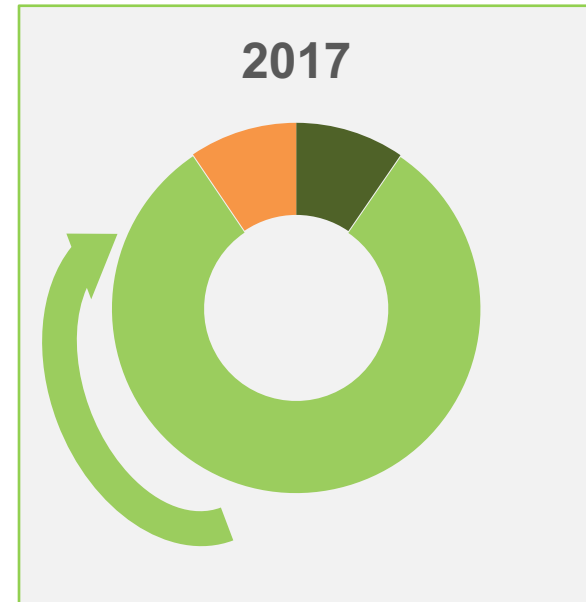
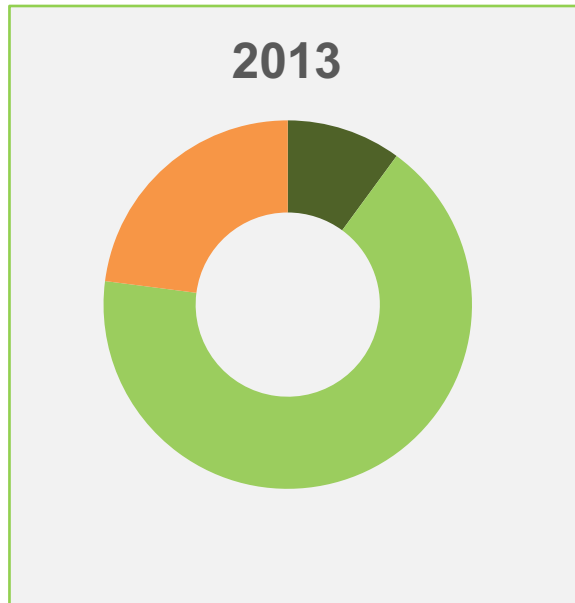


Sources: as indicated in chart legend + Delta Think analysis.

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Hybrid Journals



■ Fully OA ■ Hybrid ■ Subscription Only

Source: Delta Think analysis.

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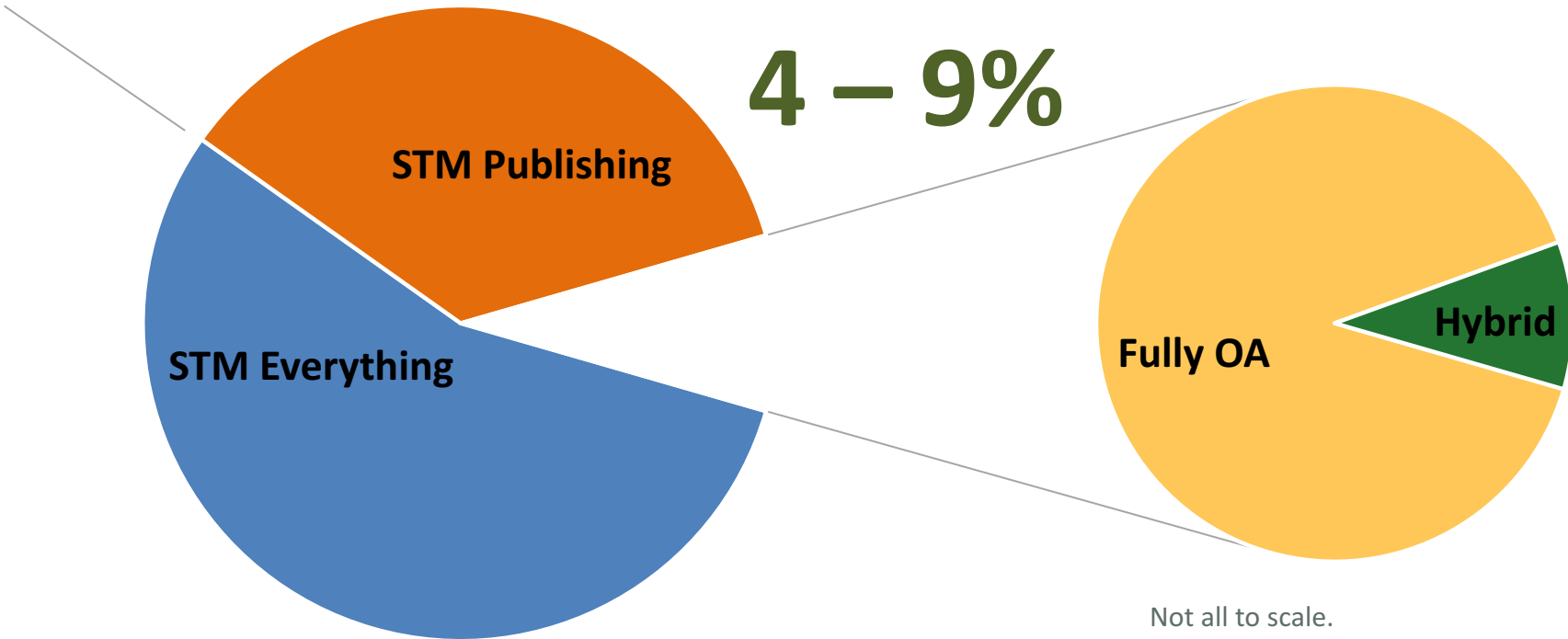
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Open Access Market

2015 \$394M

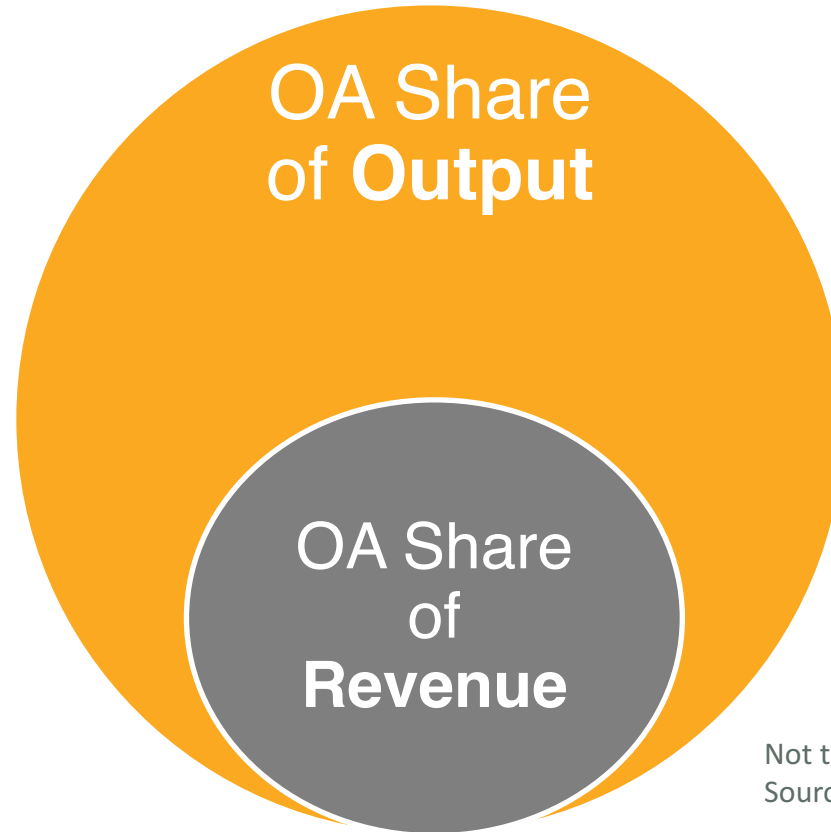
2016 \$467M

OA Estimated 2016 Market Share



Not all to scale.
Source: Delta Think analysis.

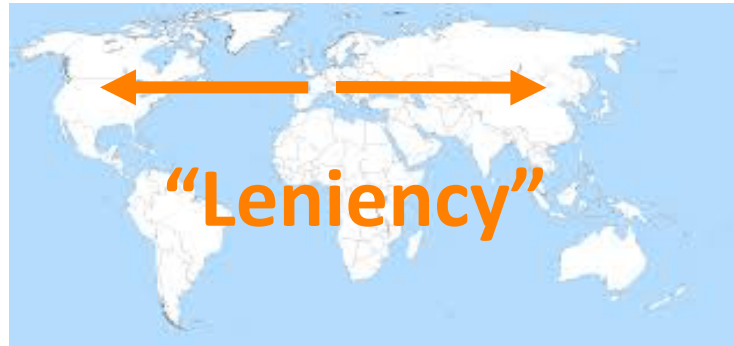
OA Output vs Value



Not to scale.
Source: Delta Think analysis.

Funders Impetus \longleftrightarrow Researcher Inertia

**Academic
Independence**



**Fragmented
Policy
Landscape**

Europe

- Centralised Vision (Horizon 2020)
- Some mandate against Hybrid

UK

- Centralized negotiation & policy.
- Funders aspirational; mix allowed

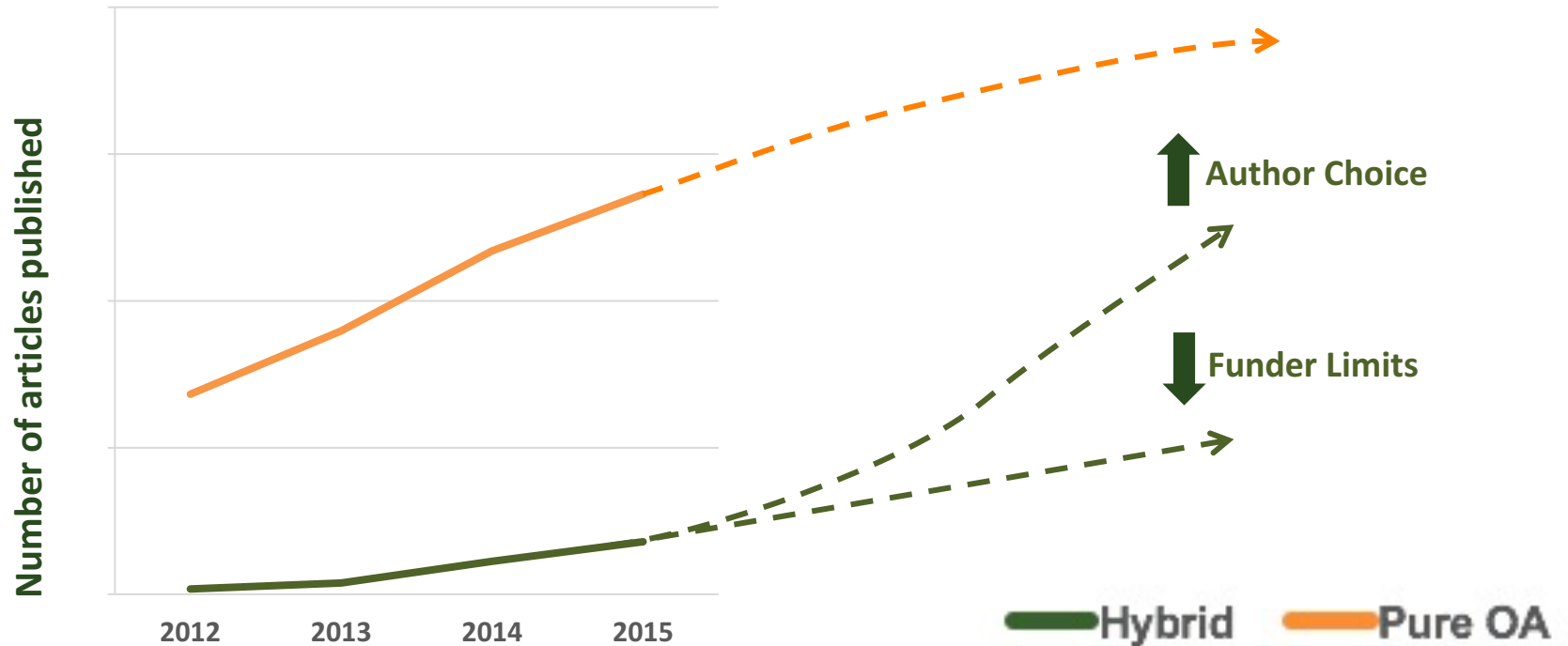
US

- Least centralized
- Public Access

China

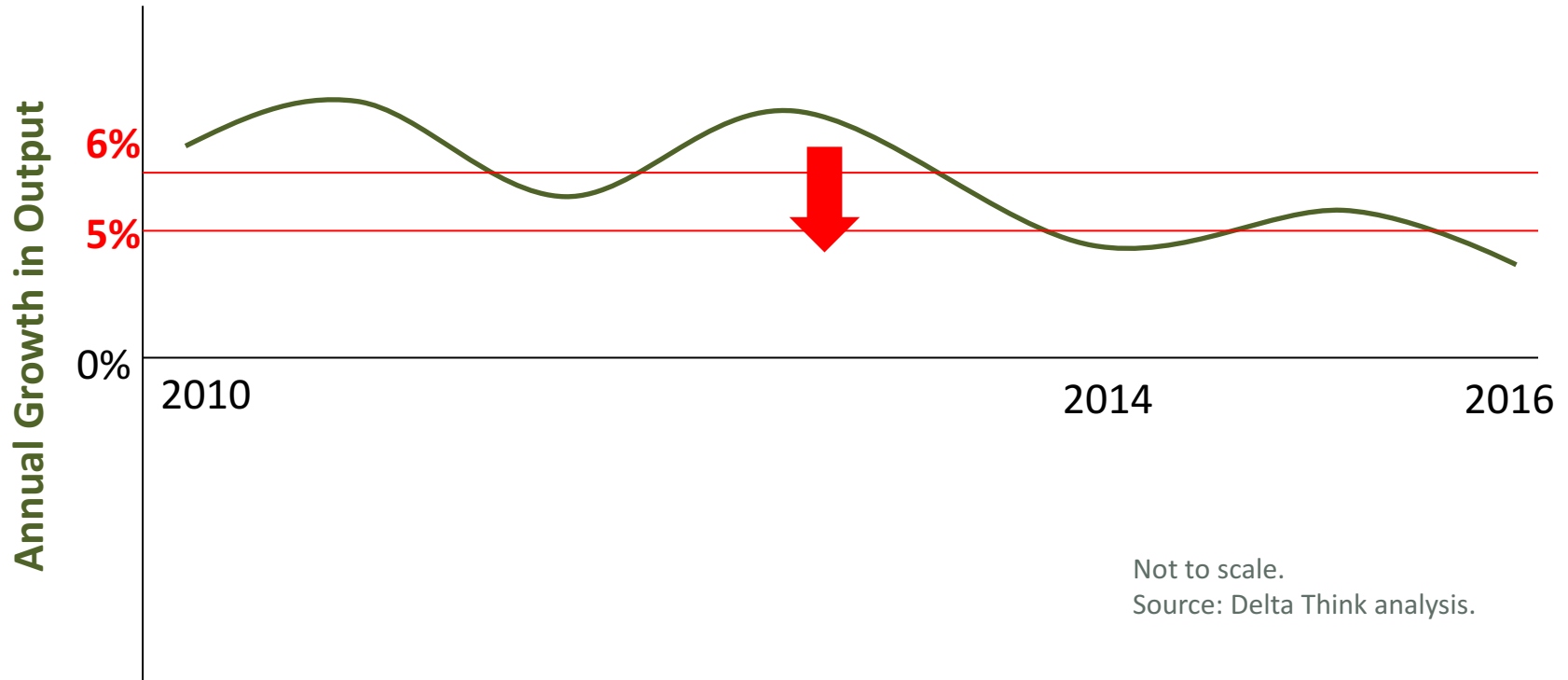
- Reward publication in Journals w/ IF ... esp. if > 5

Market Dynamics: Hybrid Outlook



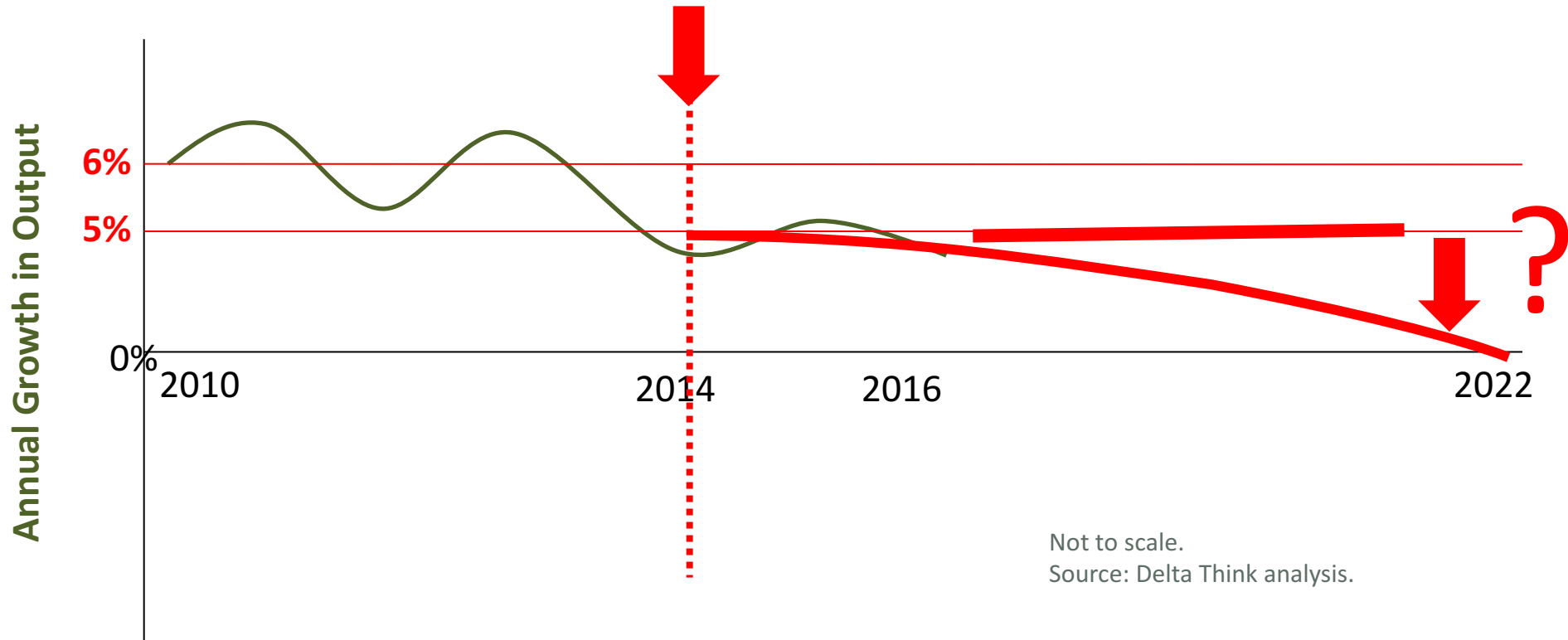
Not to scale.
Source: Delta Think analysis.

Overall Output Declining



Not to scale.
Source: Delta Think analysis.

Overall Output Declining...?



Delta Think Open Access Data & Analytics Tool

- Open Access Entrenched
- Continue to grow strongly
- Mid term funder restrictions?
- Overall output growth slowing?
- Let's measure!

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