



The Jülich Open Access Barometer

A precursor for the Open Access Monitor Germany

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Open Access Strategy of FZ Jülich: Gold OA

- The publication of the scientific findings of Forschungszentrum Jülich in gold open access journals is **explicitly encouraged**. Forschungszentrum Jülich's objective is to ensure that the number of open access publications is **10 % higher than** the **global average**.
- Publication fees for gold open access journals are **paid in full** from the library managed publication fund when the corresponding author is from Forschungszentrum Jülich.

Resolution of the Board of Directors from 24 November 2015

Open Access Strategy of FZ Jülich: Green OA

- Library completes – as far as possible – the data sets in **JuSER** by adding the **publishers' versions** of publications.
- The heads of the organizational units should send the “**Final Draft Post Referee**” version of publications to the library. The library clarifies secondary-use copyright issues and uploads the publications to Forschungszentrum Jülich's **repository** accordingly.
- The library and the Corporate Development department **monitor** the development of any **obligations** concerning open access that may be required by funding bodies, research funders, or the Helmholtz Association (PoF).

Helmholtz: 6 months, 60 % compliance in 2019, 100 % in 2023

Horizon 2020: 6 months for all peer-reviewed works

OA Strategy of FZ Jülich: Subscriptions

- Through the **active collection management** of subscription journals, the library will ensure that the increasing financial requirements of the publication fund are covered by procurement resources that become available due to subscription cancellations.
- **Publication charges** for subscription journals, including hybrid open access fees, will **no longer be paid** for out of the publication fund (cut-off date for submitted publications: 1 January 2016).

Goal of Open Access Barometer

- The library documents its course of action through the Open Access Barometer:
 - Some key figures are available to the general public on the Internet site.
 - Additional comments on the cost structure and the transformation status of the individual publishers are available exclusively on the intranet.
- Scientists at Forschungszentrum Jülich may find this information useful for their own publication strategies.



Issues to be resolved

- What data are important?
- How should these data be compiled?
- How can we comply with confidentiality clauses?

The concept

- Input data: All payments
 - Gold Open Access APCs
 - Subscription fees
 - Other publication fees (page charges, colour charges, cover charges, ...)
- Output data:
 - Usage (COUNTER)
 - Number of corresponding author publications
- Avoid absolute numbers, instead displaying fractions or ratios

Combining financial data

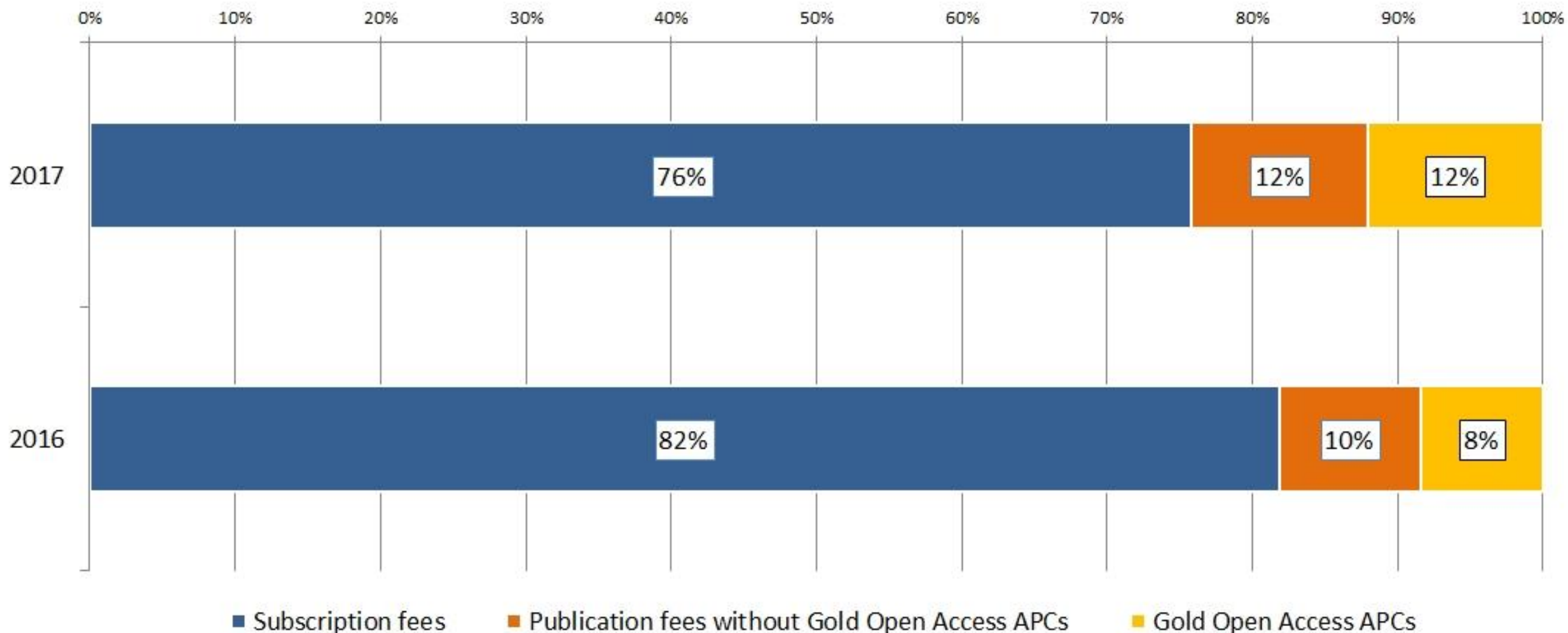
ERM
Subscription fees
Journal level
Authority records of publishers' names
ZDB-ID

Repository
All publication fees
Article level
ZDB-ID

Combination
ZDB-ID
Expenditure on journal level
Expenditure on publisher level

Irene Barbers, Nadja Kalinna, and Bernhard Mittermaier:
Data-Driven Transition: Joint Reporting of Subscription Expenditure and Publication Costs
Publications **2018**, 6(2), 19; <https://doi.org/10.3390/publications6020019>

Total expenditure in 2016 and 2017: Proportion of types of cost

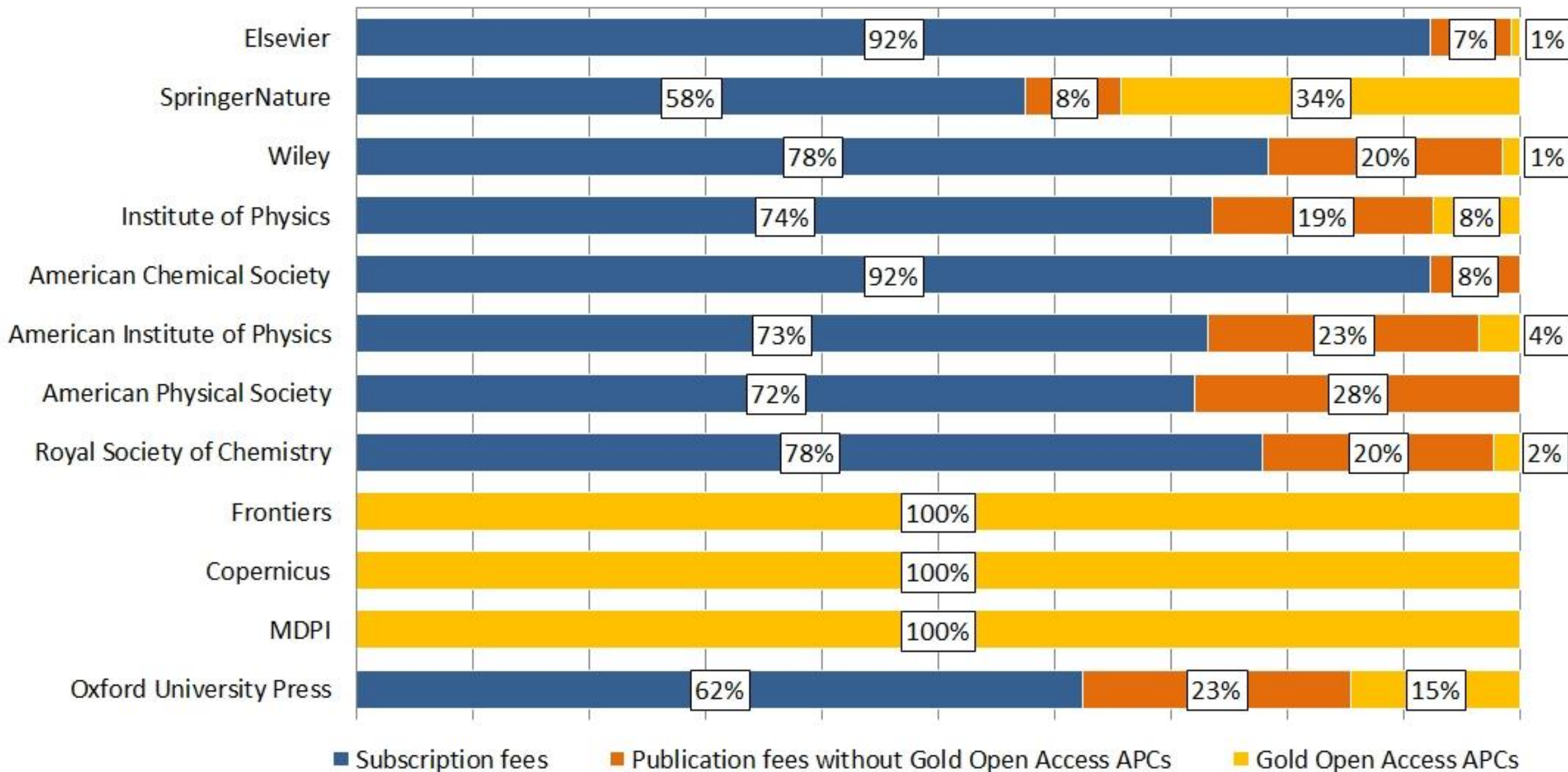


http://intranet.fz-juelich.de/zb/EN/Expertise/open_access/oa_barometer/oa_barometer_node.html

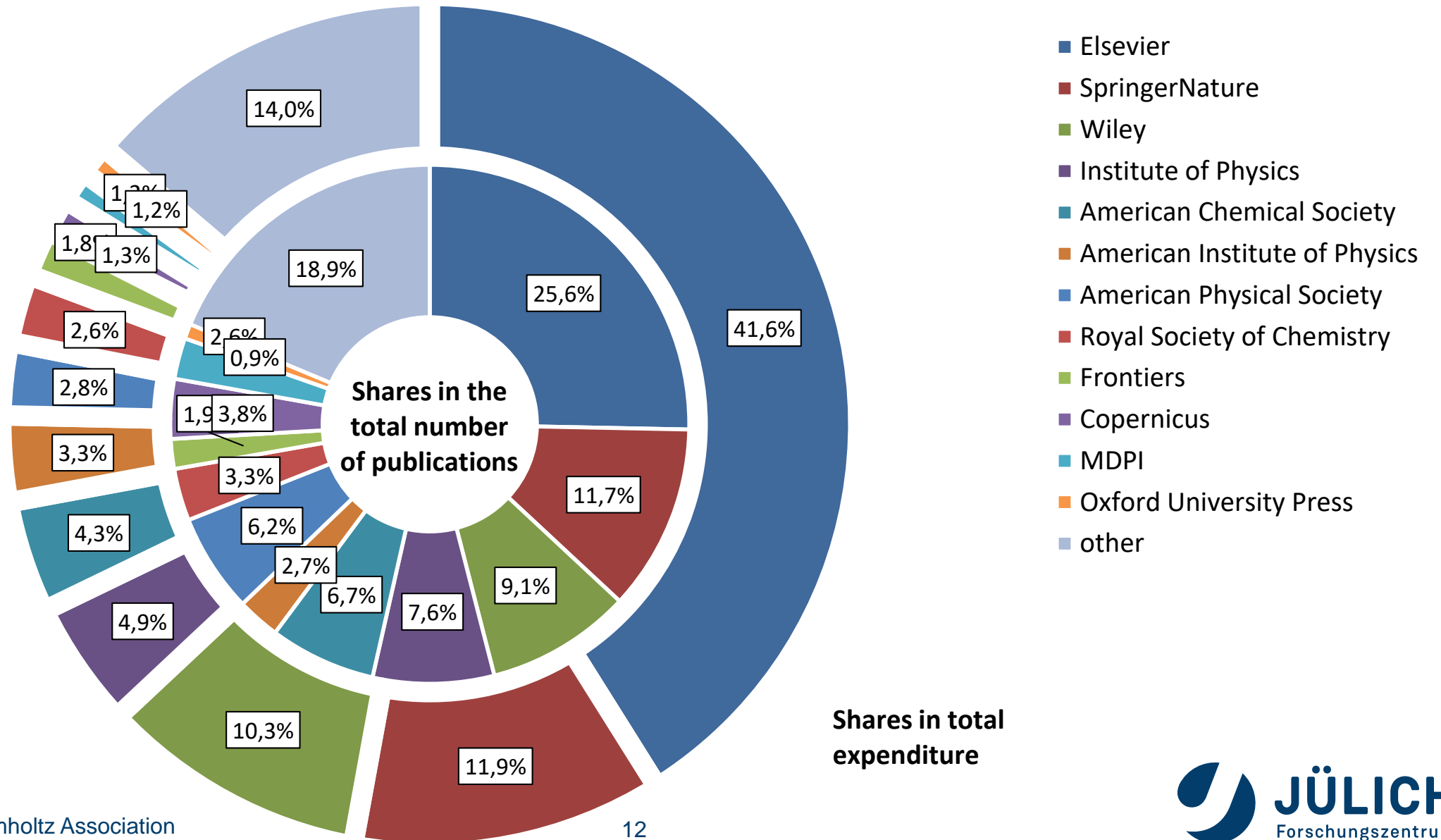
http://www.fz-juelich.de/zb/EN/Expertise/open_access/oa_barometer/oa_barometer_node.html

Proportion of types of costs in the total expenditure per publishing house 2017

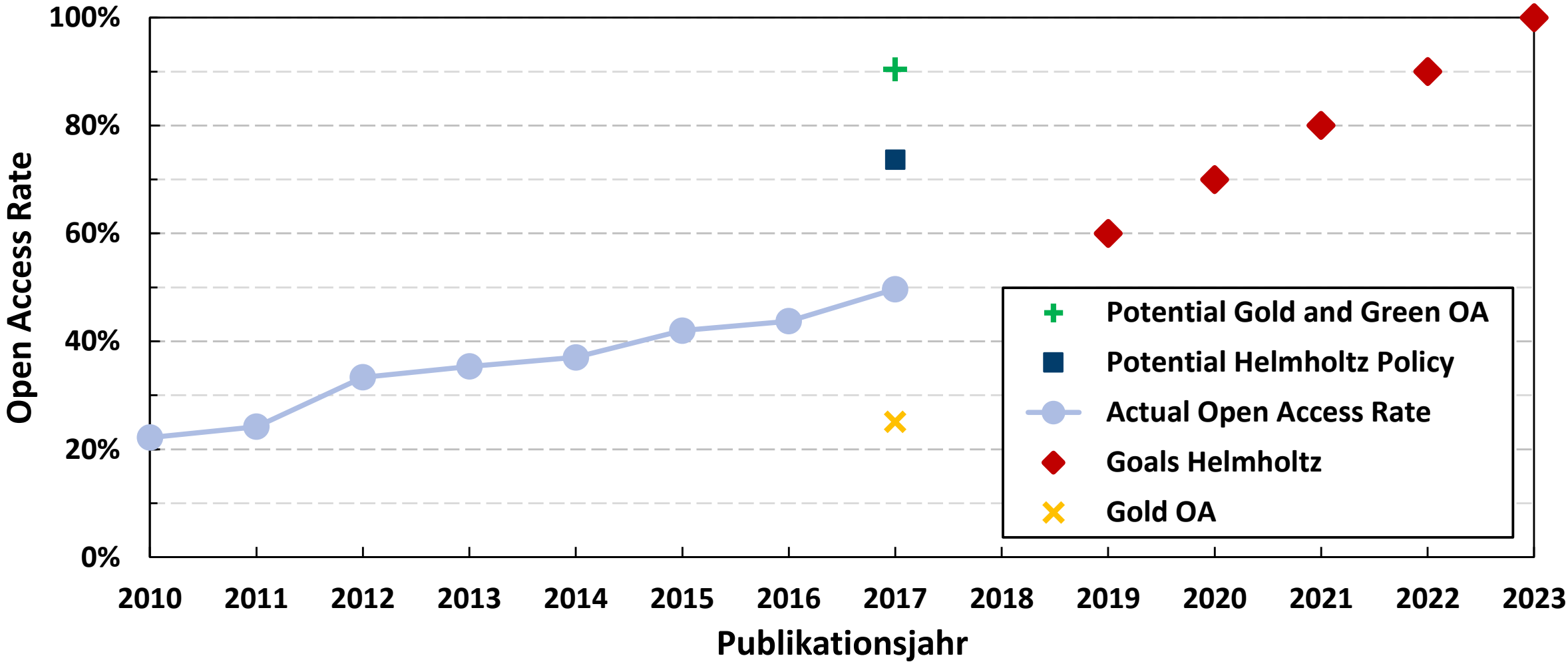
0% 10% 20% 30% 40% 50% 60% 70% 80% 90% 100%



Shares of the 12 most important publishing houses in number of publications and in total expenditure 2017



The current state of Open Access compliance





Stakeholder-specific goals of the Open Access Monitor Germany

National and regional authorities gain a 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

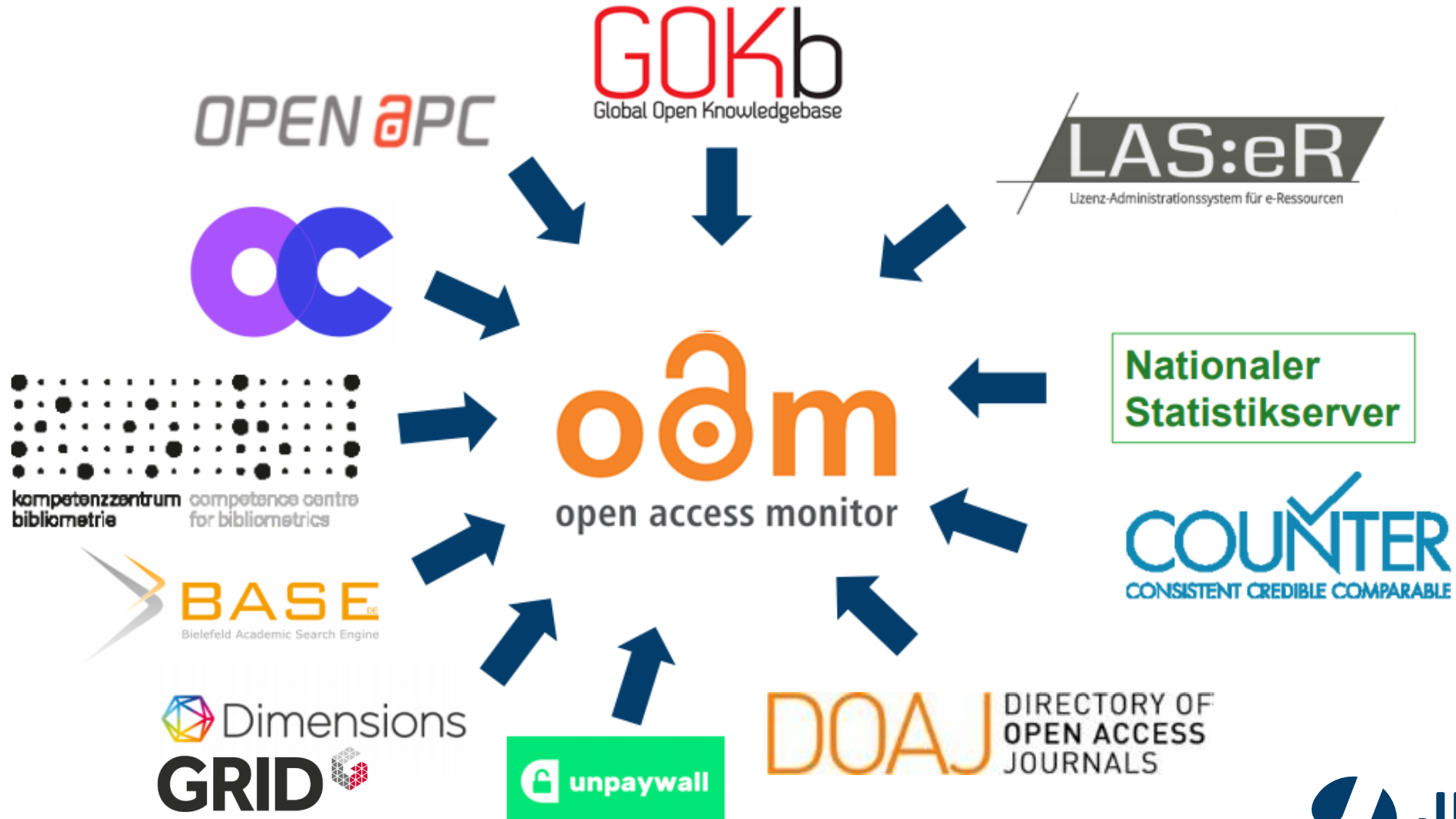
Libraries may negotiate fact-based agreements for the transition to Open Access and switch funds from subscription budgets to publication funds.

Authors may optimize their respective publication behaviour.

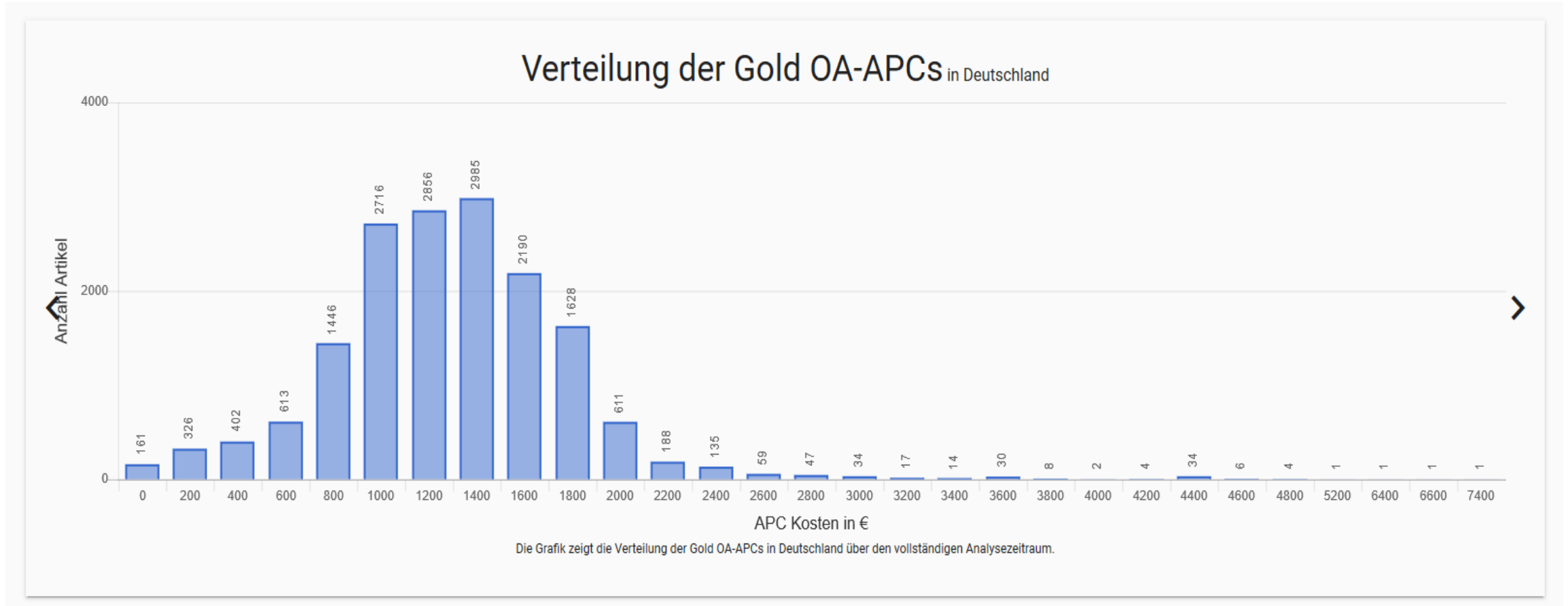
Information scientists get research data for studies on scholarly publishing.



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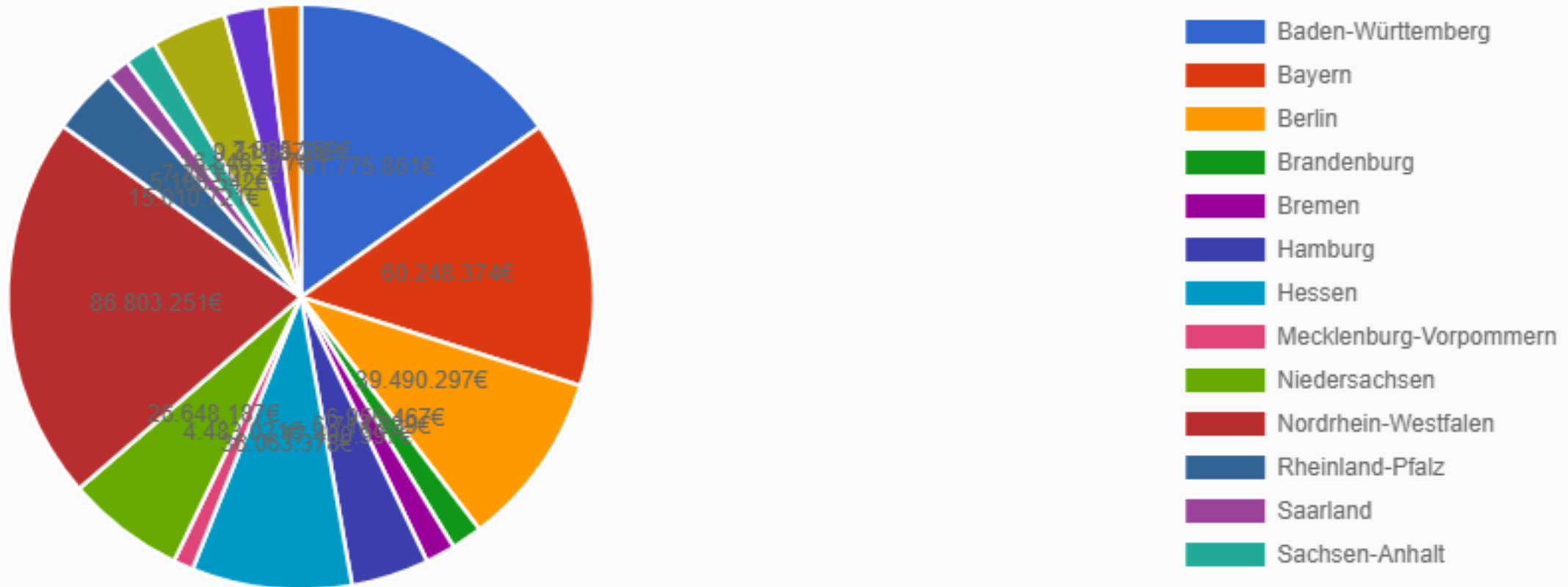
The Open Access Monitor Germany



<https://open-access-monitor.de/#/>

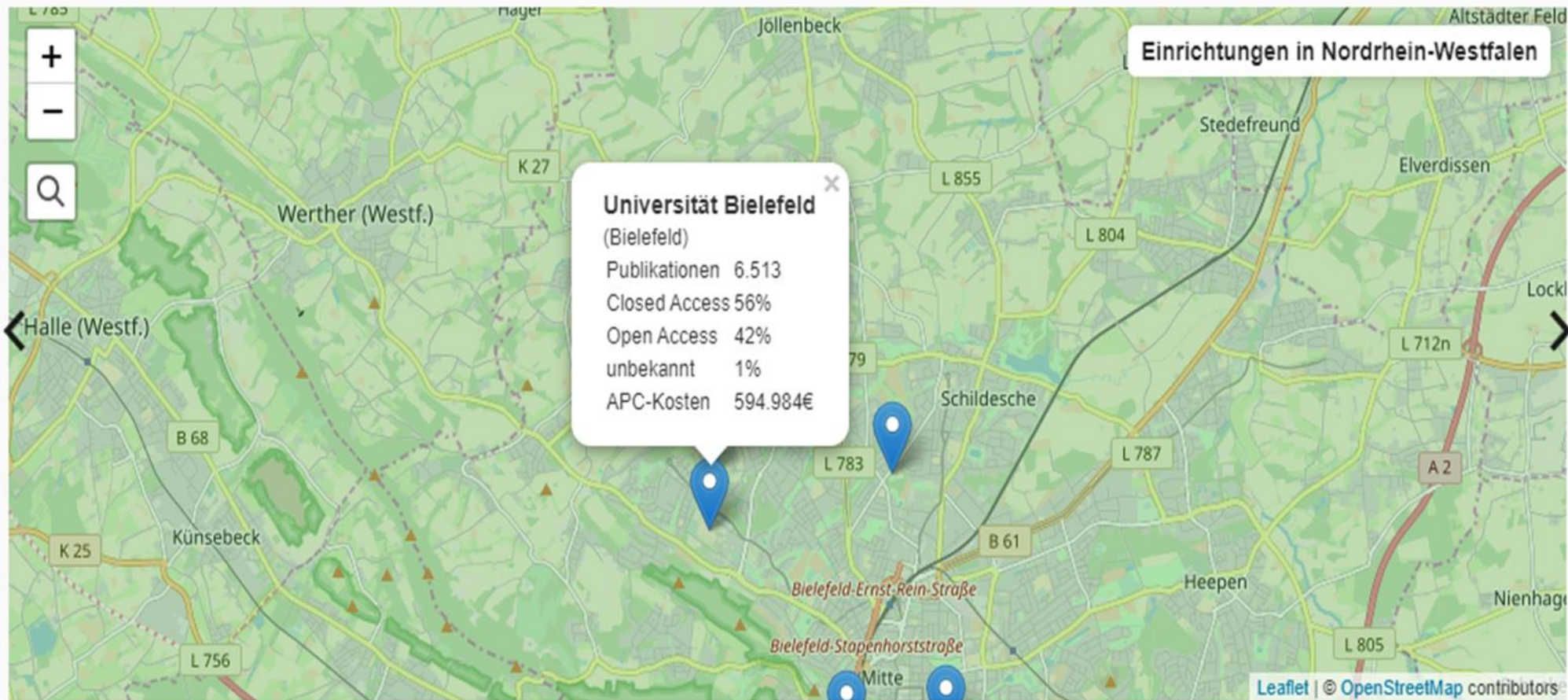
The Open Access Monitor Germany

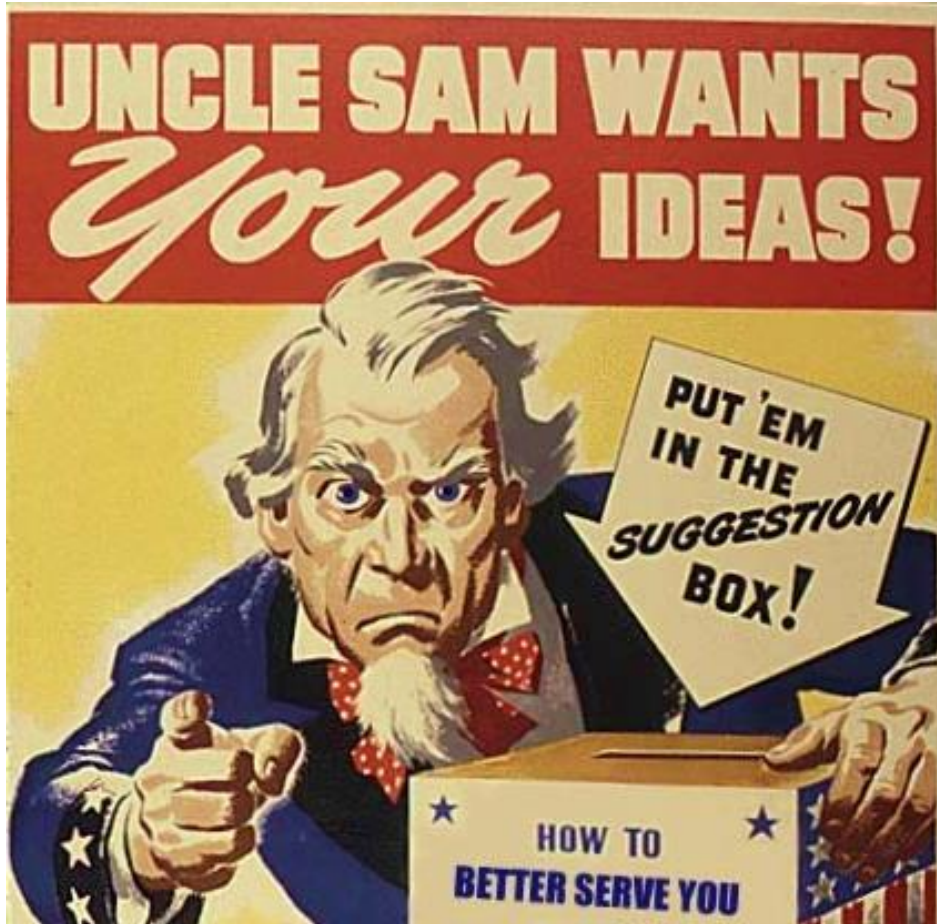
Subskriptionsausgaben je Bundesland in Deutschland



The Open Access Monitor Germany

Einrichtungen in Deutschland





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