Open Access – The perspective of small and medium-sized publishers

Results of a survey conducted among scholarly publishers from Germany, Austria and Switzerland

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Abstract

Funders, universities and libraries have been pushing for Open Access to scholarly publications for years. While Open Access agreements have been negotiated with a growing number of large publishers, smaller publishers have so far hardly figured in the debates on the Open Access transformation. We therefore asked representatives of 82 small and medium-sized scholarly publishers in Germany, Austria and Switzerland about their experiences, attitudes and offers on Open Access. The results of our survey show that Open Access is becoming increasingly important for these publishers and their authors, although there are clear differences in attitudes and knowledge regarding Open Access, depending on their size, subject areas and types of literature. For publishers, the key requirements for converting to Open Access are sufficient funding, more standardization and better communication with other stakeholders.

Keywords

Open Access, Scholarly Publisher, Survey, Business Model, Scholarly Communication, Germany, Austria, Switzerland

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1 Introduction

From the perspective of "traditional" scholarly publishers, Open Access is associated with a need to develop new services and business models and thus involves additional efforts. However, funders, universities and libraries have been pushing for Open Access to scholarly publications for years. They argue that the results of publicly funded research outside of libraries and research institutions are insufficiently visible, and they condemn the enormous profit margins of some publishers, especially in the field of scholarly journals.

The debate on Open Access thus also revolves around the price and value of publishing services, and sometimes on their substitutability. However, attention seems to be focused on a few big publishers that already control a large part of the market. Small and medium-sized publishers are hardly present in this debate, and until recently there have been few discussions and cooperation initiatives.

In this context, our survey of small and medium-sized scientific publishers in the German-speaking countries conducted in May and June 2018 aimed to gain a better understanding of the views of these publishers: How do "traditional" scholarly publishers deal with the demand for Open Access to publications? Our objective was to contribute to a better exchange between publishers, libraries and other stakeholders. The high response rate indicates that publishers consider the topic of Open Access to be very relevant and that there is significant interest in increased dialogue.

2 The situation of scholarly publishers

Publishing in the German-speaking countries has a number of specific features. The language of publication is still mostly German, but the number of English-language publications is rising steadily. Printing subsidies from authors are widespread in the book sector. The reputation of an editor is often regarded as proof of the high quality of a book series or journal, while peer review is still less common. For most German-language publishers books are more important than journals.

In contrast to the publisher landscape in Science, Technology and Medicine (STM), which is dominated by a few international publishers, the Humanities and Social Sciences (HSS) are characterized by a large number of smaller publishers[1] – not least due to the fact that the majority of publications in these disciplines are in German. However, the number of

[1] Ferwerda et al. (2017) 54–61 offer an excellent overview of the "Monograph publishing landscape" in Germany and Austria.

imprints (publishing brands) vis-à-vis independent publishing companies is constantly increasing due to takeovers.[2]

The size of a publisher plays a decisive role in determining the scope they have for developing their business models. Large publishers such as Elsevier, Springer and Wiley have an advantage in the development of electronic publishing services;[3] in particular, they have much greater resources at their disposal to build new infrastructures, and experiments with new business models are less risky for them. As a result, the publishers´ capacities differ more and more: smaller publishers need to act more "conservatively" and are less innovative due to a lack of margin for investment, but are also becoming increasingly less competitive, which again favours market concentration. [4]

Many scholarly publishers also address an audience outside the research community with textbooks, non-fiction and specialist literature: Students, general and specialist audiences such as lawyers, practitioners and technicians. This has a clear impact on the attitude of these publishers towards Open Access, as is evident from initiatives such as the Heidelberg Appeal (2009) or Publikationsfreiheit.de (2017).[5] These initiatives, which have received considerable support from publishers,[6] address or mix different topics such as the "Wissenschaftsschranke" (exceptions for scholarly use) in German copyright law, author's rights for self-archiving and an alleged obligation to publish Open Access. In fact, many publishers feel affected and sometimes threatened by all these different developments. For these publishers, Open Access appears to be another element in an increasingly difficult environment: Sales are dwindling as a result of the ever-increasing number of publications (with almost constant library budgets), and competition in the field of teaching materials is growing through new learning platforms and Open Educational Resources. Extended author and usage rights are restricting the exploitation options of publishers, while the demand for Open Access can affect not only scholarly

[2] See Fund (2017); Taubert (2016); Ferwerda et al. (2017) 59. Examples include the takeover of Böhlau by Vandenhoeck & Ruprecht, of Wilhelm Fink and Schöningh by Brill and of UVK by Narr Franke Attempto. De Gruyter has also taken over several formerly independent publishers in recent years, see Buchreport.de: So forciert De Gruyter den Programmausbau [How De Gruyter is accelerating the expansion of its programme], https://www.buchreport.de/news/forcierter-programmausbau/

[3] See Taubert (2016).

[4] See Ferwerda et al. (2017) 60: "Many of these smaller publishers have shied away from investing in new technologies or workflows to make the transition to e-publishing. This has contributed to a concentration phase in the book publishing landscape, leading to a more dominant position of the larger book publishers such as De Gruyter."

[5] The initiative "Freedom of publication for better education" has had more than 6,000 signatories. It claims, among other things, that the German Strategy for Open Access (https://www.bmbf.de/upload_filestore/pub/Open_Access_in_Deutschland.pdf) contradicts freedom of publication.

[6] The website of the German Publishers and Booksellers Association (Börsenverein des deutschen Buchhandels) still offers a sample letter in support of the Heidelberg Appeal; Publikationsfreiheit.de was launched by several publishers.

output, but also specialist media that previously could be profitably licensed or sold to customers outside the scientific community. A decline in income from collecting societies also affects publishers and leads to further financial losses.[7]

In addition, publishers complain of a lack of appreciation and insufficient funding for their services. The increasing demand for English-language publications and orientation towards STM-standards pose further major challenges; not only for authors, but especially for smaller and HSS-publishers.

Internationally, Germany plays an important role in the transition to Open Access through initiatives such as the Berlin Declaration and OA2020. Publishers' associations such as the Börsenverein des Deutschen Buchhandels (German Publishers and Booksellers Association) are nevertheless reluctant to take a stand on the subject of Open Access: no more than two booklets published in October 2008 address Open Access from the perspective of publishers in HSS and STM, respectively. To date, these brochures have been online without being updated or amended. A positive statement by the Publishers' Committee of the Börsenverein on the 10th anniversary of the Berlin Declaration in 2013 was much criticised by several publishers; since then there has been no official statement from the association with regard to Open Access.

3 Methods and delimitation

For our survey, we investigated scholarly publishers from Germany, Austria and Switzerland and checked their websites for scholarly publications. The total number of scholarly and specialist publishers[8] in the German-speaking countries is said to be over 600.[9] However, this figure includes a large number of publishers without a scholarly programme and very small publishers whose profiles were not suitable for our survey. We considered both journal and book publishers and limited the survey to commercial publishers ("traditional publishers");[10] the Open Access experiences of university publishers and newly founded “pure” Open Access publishers have already been analysed in other studies.[11] The survey was not limited to specific disciplines. The invitation to participate was subject to the condition that the registered office of the publisher be located in Germany, Austria or Switzerland. Selecting relevant publishers was a complex task because (as mentioned above) an increasing number of publishing

[7] See Fund (2017) 17.
[8] See Huber (2012) for definitions.
[9] See https://www.boersenverein.de/de/293243.
[10] See the publisher typology by Ferwerda et al. (2017) 33: Traditional publishers; University presses, institutional publishers and learned society publishers; New University Presses; Academic-led presses.
[11] See for example Schober (2018).

brands are not independent companies, but merely imprints of larger suppliers. In some cases, we had to decide at our own discretion whether sufficient independence in publishing policy was to be assumed and whether an invitation to participate in the survey should be issued. In total, we contacted 120 email addresses from 82 publishers and publishing brands for our survey.

The survey was aimed at programme managers in publishing houses and thus not only at the managing directors of these companies, but also at those who are in charge of one or more specialist areas. It is therefore possible that more than one person from individual publishing houses took part in the survey, however they may well represent different perspectives and specialist backgrounds. For this reason, we use the term "participant" rather than "publisher" in the presentation of the results.

Our survey comprised three key areas (general assessments of Open Access from the publishers' point of view; experiences with Open Access in their own publishing house; expectations for the future of scholarly publishing). Most multiple-choice questions had a free text field for comments and there were six open questions. With one exception, all 33 questions were optional and could be skipped, which meant that the number of participants answering a question varied between 18 and 39. On average, 32 to 34 participants answered per question.[12]

4 Results

4.1 Participants

More than three quarters (78 percent) of all participants (also) have a publishing programme in HSS, 25 percent state that they (also) publish in Law and Economics, and 19 percent (also) in STM. All participants publish scholarly literature and two thirds of them also produce teaching materials and textbooks, while half publish non-fiction books and guidebooks. A somewhat fewer number indicate having specialist literature for practitioners in their publishing programme. No more than six out of 33 participants stated that they publish scholarly titles only.

[12] The response data to the "Publishers and Open Access" survey can be found at https://doi.org/10.5281/zenodo.1432920

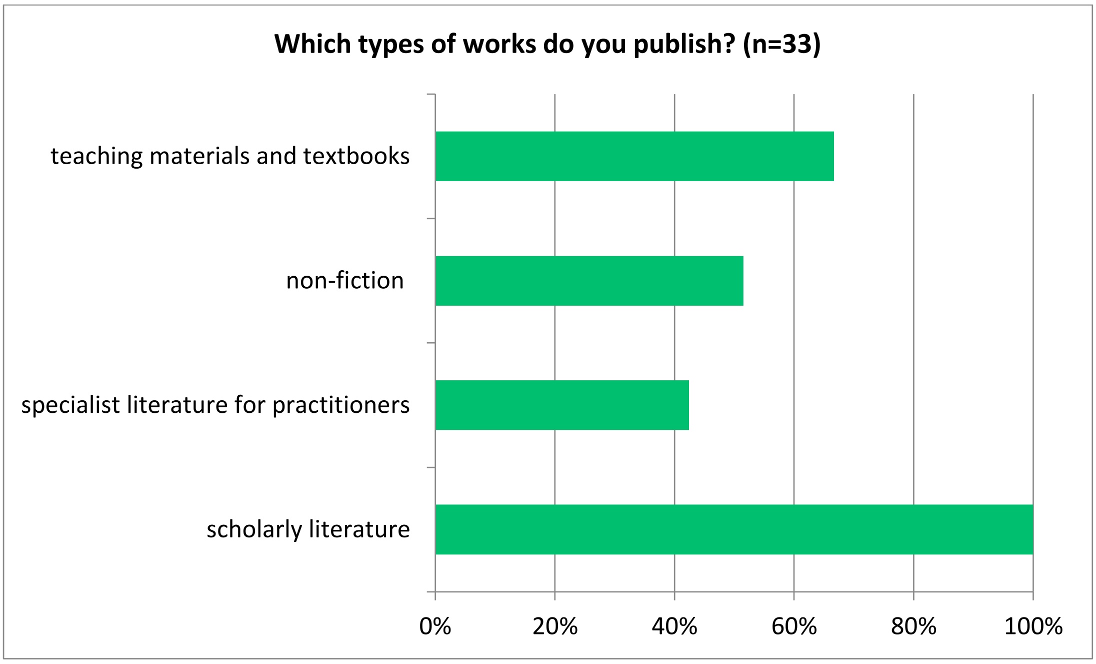

Fig. 1: Types of works

All 33 participants who answered our questions regarding the number of their scholarly output publish scholarly monographs and collected volumes; the majority of them (19 participants) fewer than 100 works per year. Most of the participants (29) also publish scholarly journals, mostly between one and nine journal titles.

Two thirds of the participants are familiar with the content of the "Berlin Declaration on Open Access to Knowledge in the Sciences and Humanities"; 27 percent have heard of it according to their own statements. Two participants stated that they were not familiar with the Berlin Declaration.

We also wanted to know whether and to what extent Open Access publications are already part of the publishers´ portfolio. Thirty-two out of 35 participants already offer Open Access publications, two stated that they do not have Open Access publications in their programmes, and another participant is planning to develop Open Access offerings. Eleven out of 33 participants do not publish Open Access journals, 19 have between one and nine Open Access journals, and three publish ten or more Open Access journals. Open Access books have been published in almost equal proportions in small (1-9), medium (10-99) and large numbers (over 100 works already published).

4.2 Demand of Authors for Open Access

According to the participants, the **demand of their authors** for Open Access offerings has increased slowly (59 percent) or significantly (31 percent), while only 10 percent said that author demand has not risen during the last few years. Participants who report a significant increase rate Open Access more often as the future standard of scholarly publishing (45 percent agreement; 33 percent of all participants chose this answer). These participants predominantly represent larger publishers, with at least 100 annual book publications and more than ten journal titles. In the comments, this information was explained in more detail by some participants: It was pointed out, for example, that young and internationally oriented authors are more interested in Open Access than others and that the transition to Open Access is being driven forward by EU initiatives and funding organisations.

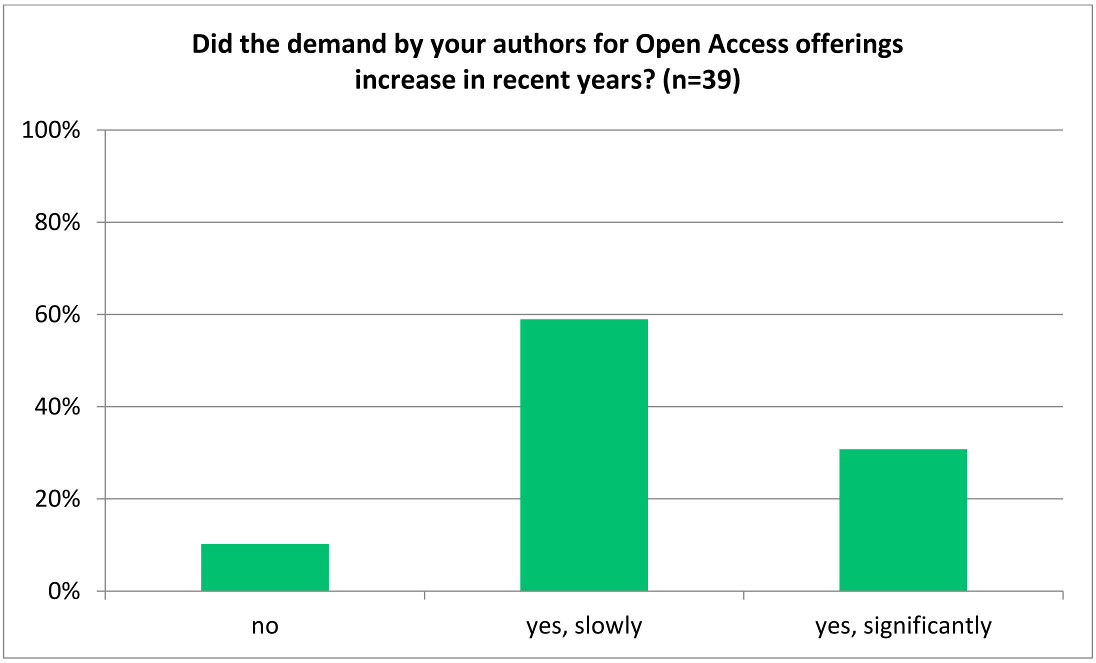

Fig. 2: Demand of authors for Open Access offerings

For **author acquisition**, Open Access offerings are moderately relevant for just over half of the participants, but very relevant for a smaller proportion (18 percent). To 26 percent, on the other hand, they are of little importance. According to the participants' comments, the publisher's reputation is a more important criterion for authors than Open Access and the demand for Open Access is largely due to funding requirements.

4.3 Assessments of Open Access from the publishers' point of view

The greatest **advantages** of Open Access were reported as being greater visibility and competitive advantages for the publisher, in particular by participants with publishing programmes in HSS. Participants with an STM publishing programme see comparatively fewer competitive advantages through Open Access. The development of a new market and financial incentives are only partially associated with Open Access. Comments point to the opportunity for cooperation between publishers and universities that support Open Access. Positioning publishers more strongly as service providers that use Open Access to promote the visibility of their authors was also mentioned as an advantage.

On the other hand, participants also associate some **disadvantages** with Open Access, especially with regard to legal uncertainties, unclear business models – especially for participants who also publish non-fiction books – and perceived pressure from funders. Participants who see such pressure for Open Access state that their publishing staff have less knowledge of Open Access and that the services expected in connection with Open Access publications are rather unclear. They perceive fewer developments in scholarly publishing than the average. However, more than 70 percent of the participants only partially or hardly agree that additional costs due to Open Access are a disadvantage.

The open question concerning possible **incentives for publishers** to develop Open Access offerings brought very different answers. A number of participants mentioned financial incentives – in particular, a need for a financing model for Open Access books was repeatedly expressed, as was the need for clear funding rules and funding opportunities, especially for authors without an institutional background. Participants also mentioned the need for more transparent cooperation models between publishers, universities and libraries and called for further standardisation and a coordinated approach in central markets such as the EU and the USA. One participant suggested that discipline-relevant forms of publication should be considered by means of subject-specific publication funds.

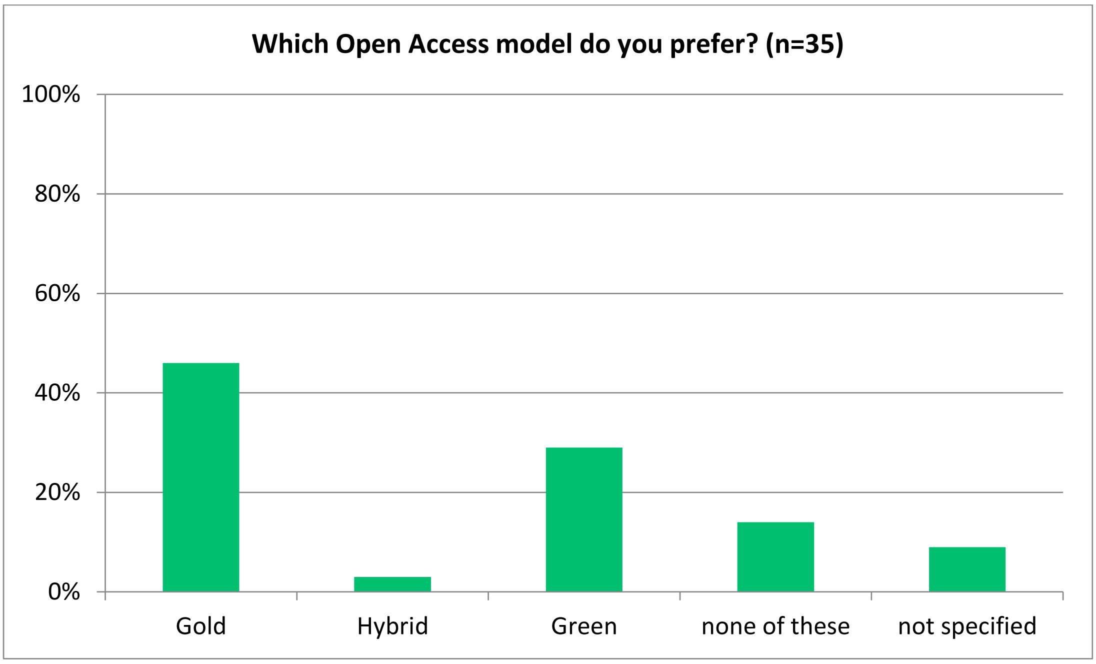

Fig. 3: Preferred Open Access model

Almost half of the participants of our survey prefer Gold Open Access. In contrast, just under 30 percent of respondents cited Green Open Access as a **desirable model**, while 14 percent (five participants) stated that they did not favour any of the above-mentioned models (Gold, Green or Hybrid Open Access).

Participants with a preference for **Gold Open Access** showed significantly different attitudes than the other participants in some respects. They more often state that they are familiar with the Berlin Declaration and a large majority of them find the expected services for Open Access publications to be at least "sufficiently clear" (69 percent compared to 57 percent). They have already published more Open Access books than the other participants and are more positive about Creative Commons licences (54 percent compared to 48 percent). Almost half of these participants stated that they have a self-archiving policy (overall: 27 percent). Most represent publishers with a programme in HSS (92 percent), and they more often than others expect an increase in English-language publishing and (Open) Peer Review. These participants publish specialist books, non-fiction books and textbooks less frequently than others.

On the other hand, participants who prefer **Green Open Access** feel more often pressured into Open Access by funders, are less aware of the services expected and estimate higher administration costs related to Open Access titles than the other participants. Sixty percent of these participants do not publish OA journals, and they have fewer OA books in their publishing programmes. Beyond that, they are highly sceptical about Creative Commons licences and stated less often than other participants that they are familiar with the content of the Berlin Declaration.

For just over half of all participants (57 percent), the services that publishers should provide for Open Access publications are very clearly to sufficiently clearly defined. Some participants noted that many people are unaware of the wide range of services publishers provide and that these must be paid for. Proofreading, marketing and the examination and documentation of ever new channels to promote visibility were mentioned, as well as contracts with service providers such as Knowledge Unlatched. In addition, participants addressed the problem of the numerous different Open Access policies of the universities and funding bodies. These make it difficult for publishers to publish Open Access series with authors affiliated with different institutions.

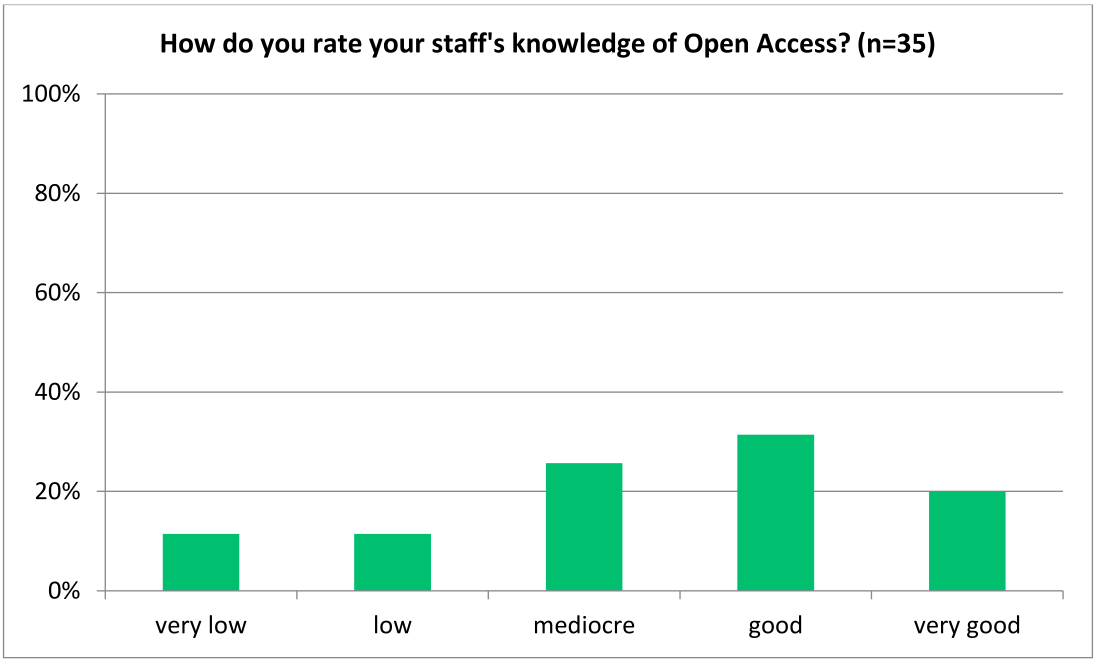

Fig. 4: Knowledge of staff

Half of the participants rated the **Open Access skills of staff** in their own publishing company to be good to very good, and a quarter as mediocre. Around one-fifth, however, consider these skills to be humble to very humble. Participants from larger publishing houses tend to report better knowledge of their staff. The range of comments is wide: from "years of training" to "terra incognita", from "Open Access affects everyone" to setting up their own Open Access Taskforce, to the statement that so far only a few employees have had anything to do with Open Access.

Participants estimated the **investments** required to convert to Open Access to be large to very large, particularly for the cross-linking of content (60 percent), followed by ongoing administration (45 percent). They assume the costs of preparing data, training personnel and, in particular, technical infrastructure to be lower. The extent of the investments was also correlated with the existing know-how from the publication of e-books. Some participants mentioned the necessary conversion of the business model, as well as Search Engine Optimization in order to make the digital contents findable online, as explicit administrative expenditure. Automation would be hard to achieve due to heterogeneous processes. The presumed lower importance of specific further training was based on the assumption that publishing activities will not change as a result of Open Access, and that the change mainly concerns the differences between business models.

In answer to the open question as to whether publishers need **support** and if so which kind, financial issues (compensation for decreasing sales revenue) were frequently mentioned. Participants also asked for more standardisation, clear definitions, and better coordination and cooperation with libraries and funding bodies, and called for "fairness" in the form of sincere cost accounting for University Presses in addition to appropriate remuneration for their publishing services.

Eighty nine percent of participants agree that content should be **excluded from Open Access** if the legal situation is unclear. Regarding content for which there is a market outside the scientific community, approval was 61 percent; in the case of content for which "controlled" dissemination is desired, it was almost as high.

4.4 Practical experience with Open Access

In the next section of our survey, we asked the participants about their **experiences and practices** concerning Open Access. Two-thirds indicated that they list Open Access publications in a separate area of their website, and almost one third each (also) uses the Directory of Open Access Journals, the Directory of Open Books and/or the OAPEN Library. Eighteen percent stated that they did not use any of these options, although some pointed out that they were working on it or that "negotiations" were taking place with DOAJ and/or DOAB. Participants also mentioned subject repositories, the websites of authors or their institutions, and institutional repositories.

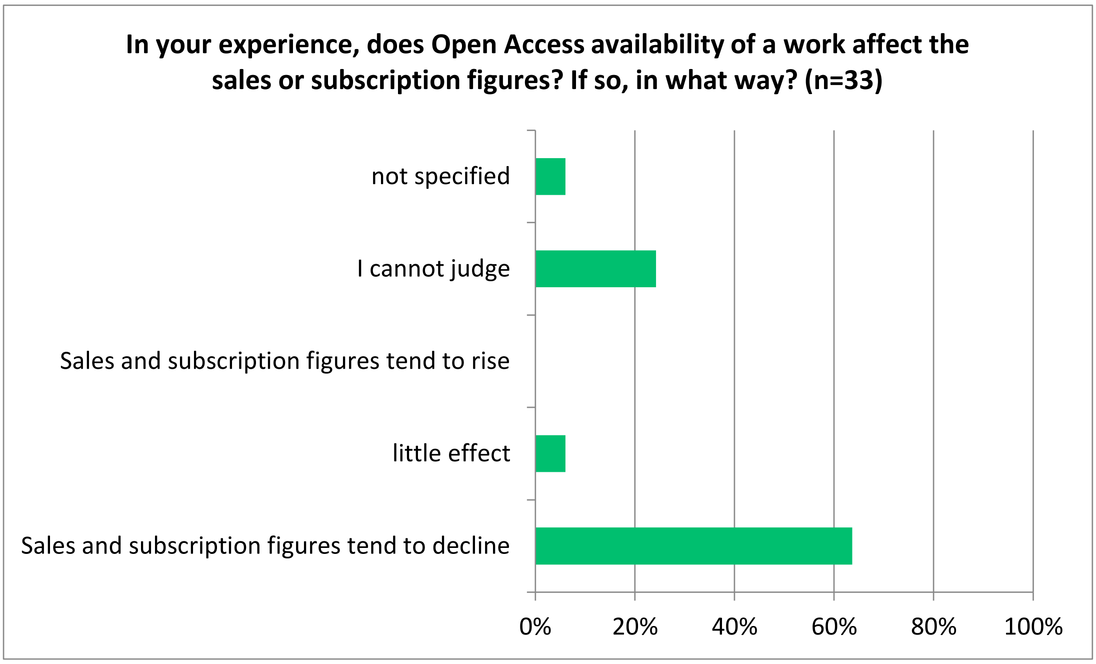

Fig. 5: Effects of Open Access on sales and subscription figures

When asked about the **effects of Open Access availability** on the sales and subscription figures of the respective works, around two-thirds of the participants indicated that sales tended to decline, while only two participants (6 percent) saw hardly any effects. Almost a quarter of the participants stated that they could not assess this; none of the participants chose the option "sales tend to rise". The comments on this question were very heterogeneous, however: several participants pointed out that the effects could not be determined with certainty and that, depending on the work and/or topic, there might also be increasing sales figures; others stated that sales figures were falling "dramatically".[13] To a participant from a publishing house specialising in niche topics, Open Access is an opportunity to reach a wider audience than with traditional forms of publication.

[13] Contradicting these perceptions, “no significant effect of open access was measured on the number of copies sold” in a study on the impact of open access on scientific monographs in Switzerland (Ferwerda et al., 2018, 38).

4.5 Exploitation rights and self-archiving

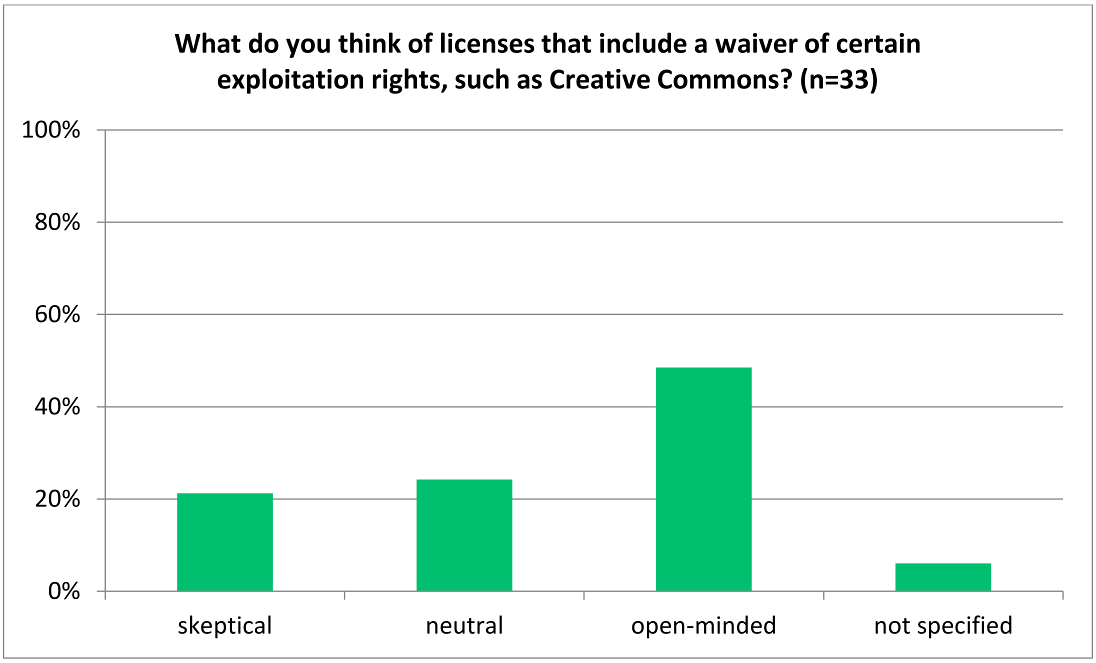

Fig. 6: Attitudes towards free licenses

Nearly half of the participants (48 percent) described themselves as open-minded towards **Creative Commons**, which means that publishers, depending on the licensing model, waive certain exploitation rights, while a quarter (24 percent) are neutral. One fifth (21 percent) were sceptical. The comments show that CC licences are accepted as long as sufficient funding is provided and publishers do not incur any losses as a result. Only when considering which CC license should be recommended to the authors did opinions differ. While one participant rejects CC BY-NC and CC BY-ND and generally recommends CC BY, another explicitly advises against CC BY because it also permits commercial use, and prefers CC BY-NC-ND.

The following questions dealt with different aspects of **self-archiving**. Almost half of the participants grant authors of contributions to collected volumes and journal articles additional rights beyond the legal self-archiving right, such as the use of the final publisher's version instead of the accepted version and/or a shorter or no embargo period. Many participants stated that they decide on a case-by-case basis which rights are granted that go beyond the legal provisions. Participants from publishers who are very restrictive towards self-archiving (38 percent) attribute more disadvantages and fewer advantages to Open Access and are also very sceptical about Creative Commons licences. More often than others, they associate Open Access with declining sales figures. Although these participants do not provide significantly different information on their authors' demand for Open Access than the others, they believe that the sale of books will continue to be their main source of income in the future.

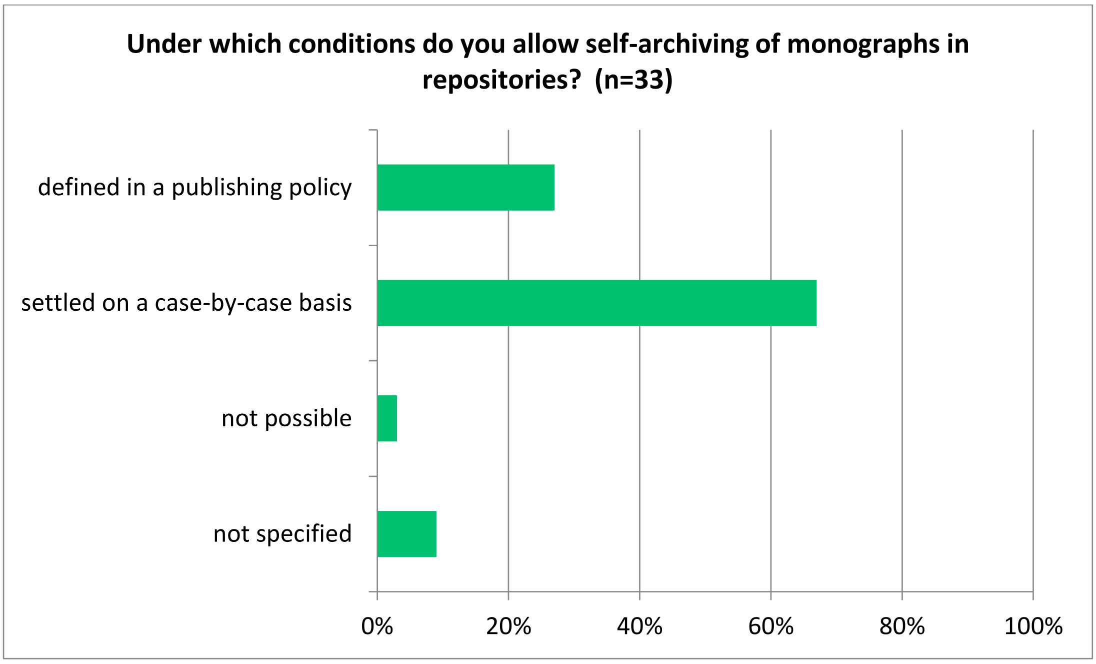

Fig. 7: Self-archiving of Monographs

In Germany, Austria and Switzerland authors are not legally entitled to self-archive their monographs. However, only one participant stated that they would not allow the self-archiving of entire books in repositories. Two thirds of the participants (67 percent) settle this on an individual basis, and about a quarter (27 percent) have a publishing **policy** for the self-archiving of monographs in repositories.

4.6 Future of scholarly publishing

The last part of the survey dealt with participants' assessments of developments in the field of scholarly publishing and the future role of Open Access.

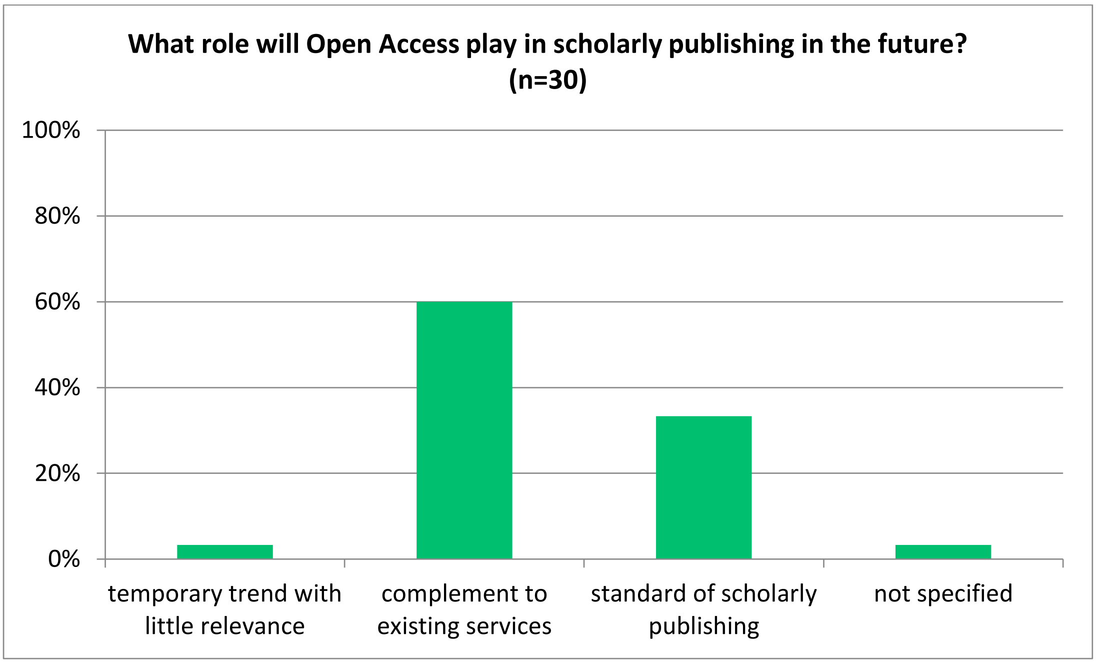

Fig. 8: Future role of Open Access

For 60 percent, the **future role of Open Access** is to complement existing publishing services, with one third assuming that it will become the standard of scholarly publishing. Only one participant regards Open Access as a temporary trend and thus as irrelevant for the future of scholarly publishing. Several participants noted that the future market for Open Access, and thus its significance, depends to a large extent on the conditions and opportunities for funding as well as on the political mood, which might turn away from Open Access again. Participants also pointed out differences between the individual disciplines and publication types.

In addition to Open Access, the vast majority of participants (83 percent) also regard English-language publishing as a **major trend**, with around half of the participants also expecting increasing international competition (53 percent) and an increase in (Open) Peer Review (47 percent) (see Section 2 on specific features of publishing in the German-speaking countries). Comments on this question pointed to enormous differences depending on the discipline. Metrics such as the impact factor or the way they are calculated, the "quantity before quality" mentality with the fragmentation of publications and the resulting mass of publications, and the growing influence of STM standards in all areas, as well as increasing "obligations to publish" for early-stage researchers, are viewed very critically by many participants.

Participants' **reactions** to the expected developments range from an adaptation to market developments to cooperation, conversion to English-language publishing and pilot programmes. Obstacles perceived by participants are a fixation on STM publishers as well as a lack of resources and English language skills of the authors, which often require cost-intensive translations or proofreading. German-language publishing programmes are therefore "threatened with provincialisation", and the increase in English-language publishing presents a huge challenge from the publishers' point of view.

As **future sources of income**, the participants primarily mention services such as editing, layouting and workflow management, as well as book sales and Open Access fees. Journal subscriptions, services for research data management and author training courses are regarded as less significant sources of income. E-Books and paid databases were also mentioned.

4.7 Differences by subject area

An evaluation according to different subject areas reveals subject-specific differences in the practice of scholarly publishing. It should be noted that participants could identify more than one subject area in which they publish. Due to the limited number of participants, only rough trends can be shown.

Publishers with a programme in the Humanities and Social Sciences

Twenty-five participants (78 percent) (also) publish in HSS. For this reason, this group hardly differs from the overall results of the survey. The majority (54 percent) of the participating HSS publishers publish at least 100 books per year, and all of them indicate that they already have Open Access publications in their programmes. They view Open Access more positively than the average, but rate the effort required to modify their processes as higher.

Publishers with a programme in Law and Economics

Eight participants stated that they are (also) active in this field, which accounts for 25 percent of all survey participants. Five of them also publish in the HSS. The eight participants differ from the average in the following respects:

- Seven out of 8 participants also publish textbooks.
- Participants representing Law and Economics publishers do not perceive a significant increase in demand for Open Access.
- They believe that Open Access offers the advantage of greater visibility.

- They see fewer disadvantages related to Open Access, especially no "unclear business model".
- Only one participant in eight prefers Gold Open Access, while three chose the "no Open Access model".
- They estimate that less effort is involved in switching to Open Access in terms of technical infrastructure and in connecting content in databases.
- With regard to technical infrastructure and the integration of content in databases, they see comparatively less effort is required for a transition to Open Access.
- Only 3 out of 8 participants stated that Open Access titles are presented in a separate area on their website.
- Five out of 8 participants are open-minded about Creative Commons licences.
- Participants from Law and Economics publishers allow self-archiving of the publisher's version with above-average frequency.
- All participants from Law and Economics publishers see an increase in English-language publishing.

Publishers with a programme in the Sciences, Technology and Medicine

Six participants stated that they are (also) active in these fields, which is 19 percent of all survey participants. They differ from the average in the following respects:

- Four participants also have textbooks, non-fiction and specialist literature in their publishing programme.
- The Berlin Declaration is particularly well known among these participants.
- They see a considerably stronger increase in demand for Open Access than the other participants.
- For them, Open Access offerings are of above-average relevance for the acquisition of authors.
- From the point of view of these participants, Open Access offers a new market and financial incentives.
- Open Access is particularly closely associated with "forced gratification by sponsors".
- Investments in Open Access are generally rated lower than by the other participants.
- Five out of 6 participants stated that they have their own Open Access area on their website.
- All participants reported an increase in English-language publishing.

5 Discussion

5.1 Publishers' concerns about Open Access

The vast majority (90 percent) of participants in the survey indicated a slow to significant increase in author demand for Open Access offerings. These are even reported to be decisive in some authors´ choice of publisher. It is therefore surprising that just a few publishers are actively involved in developing their own Open Access offerings, and that some are even supporting or leading Open Access-critical initiatives.

This could be because of the limited financial leeway for many publishers to develop Open Access services and know-how. In addition, the funding of Open Access publications seems uncertain and complex.[14] Some participants expressed concern that Open Access funding would increasingly leave the scholarly publication system "at the mercy of the imponderabilities of the public sector".[15] Legal uncertainties in the use of third-party content may also play a role, and participants perceive that an additional administrative effort is required, e.g. through the preparation of (meta-)data. According to the participants, additional guidance for authors that publishers provide to explain Open Access options is not perceived and compensated for.

Open Access is also associated with distorted competition with major international publishers through the DEAL negotiations[16] and with University Presses. Some participants fear that the DEAL negotiations will increase market concentration and that even more financial resources of libraries will go to a few large publishers, so that the acquisition budgets will be insufficient to purchase titles from smaller publishers.[17] Some participants reproached University Presses for not offering their services at real prices ("without honest full cost accounting", which would also have to include costs for staff, premises and their equipment), of not offering the full range of publishing services and of acting as "unfair" market participants with the support of the universities.

Various business models of publishers for industrial and commercial users would become obsolete if they were to switch completely to Open Access, as there would no longer be any fees for reading scientific publications. A majority of the participants in our survey would therefore want to exclude content from Open Access that is also read and paid for outside the scientific community.[18]

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[14] See also Bergmann/Münch (2018).
[15] Siebeck (2014) 45 expresses similar fears.
[16] See https://www.projekt-deal.de/about-deal/
[17] See also Ball (2018) 12.
[18] Representatives of publishers and publishing associations also point out in a number of publications that with Open Access, users outside the scientific community, e.g. from industry and the private sector, no longer contribute to the costs of scientific publishing, and the publication costs for publicly financed

However, the results of our survey also show that some publishers have little interest in developing new publishing options. This is reflected in the fact that the terms "Open Access journal" and "Hybrid Open Access" have been used differently, that some participants are not familiar with the "Berlin Declaration" and that knowledge of the requirements for Open Access publications and their promotion seems to be limited. The extent to which it is a responsibility of publishers or other stakeholders to collect or deliver this knowledge is worth discussing. However, it can be assumed that publishers that do not (want to) adapt to changing requirements will not be able to persist in the long term.

5.2 Open Access as an opportunity for publishers

As the results of our survey show, many publishers see Open Access as an opportunity,[19] but to varying degrees and for different reasons. In general, larger publishers see Open Access more positively than smaller publishers. The sceptical to sarcastic comments on Open Access and the future development of the publishing industry that were made as part of our survey were mainly made by participants from smaller publishers.

A large number of responses and comments in our survey showed that publishers are keen to improve cooperation with other stakeholders such as libraries and funding bodies and to simplify administrative processes in Open Access publishing. Common standards and platforms, clearly structured information and financing models are key requirements from the publishers' perspective, as illustrated by the following quote by a survey participant:

> "We need clearing offices for the distributed knowledge of Open Access funding at universities, memberships of companies and associations. We want to establish series or transfer them to Open Access and not have to decipher the individual author affiliation to a university and its individual Open Access policy for each volume. From an economic point of view, this is burnt money. The system needs to be more efficient and, above all, more transparent."

It is interesting to note that the preference of particular Open Access models allows conclusions to be drawn about participants' attitudes to other issues (see 4.3). Green Open Access, which is favoured by 29 percent of the participants, involves less effort from the publisher's point of view and allows a more passive attitude. It can be used to

institutions will rise as a result of Open Access. See Hauff (2013) 26; Kalumenos (2011) 154; Siebeck (2014) 43-44. Librarian Rafael Ball (2018) even predicts a subsidy and speaks of "profiteers of transformation" in the private sector.

[19] See also Bergmann/Münch (2018).

respond to authors' wishes or legal requirements such as self-archiving regulations. At the same time, publishers pursuing this model are more dependent on third parties and are more likely to perceive external control or even exploitation.[20] Last but not least, they also forego possible sources of income. Participants who prefer "Green Open Access" in our survey tend to be less informed, but above all more sceptical towards Open Access. Gold Open Access, on the other hand, which 46 percent of the participants prefer, requires new strategies, commitment and investments that publishers must be able and willing to afford, but it also offers financial incentives and a new business model. In position statements by publishers' associations and representatives of various publishers,[21] Gold Open Access is consistently described as the desirable and easily implementable model, while Green Open Access is viewed much more critically. According to these statements, the latter does not guarantee appropriate financing of publishing services; various available versions increase the lack of transparency in the field of publications; the acceptance of Green Open Access by authors is uncertain; and repositories are costly, but do not meet all the requirements of scholarly publishing.

Participants representing larger journal publishers in our survey show the greatest confidence with regard to future sources of income. They tend to expect that not only will subscription revenues continue, but that also revenues from Open Access fees, services, research data management and advisory services for authors will rise. Major international publishers such as Springer already serve such needs, offering language editing, writing courses and a literature recommendation service,[22] as well as services for research data management. It remains to be seen whether and which small and medium-sized publishers can persist in this competition and which market niches they are able to occupy.

5.3 Status quo and current developments

Plan S,[23] an initiative for Open Access publishing released in September 2018 (three months after we conducted our survey) by research funders, requires Open Access for all publications from funded research projects and has triggered much reaction – mostly critical – from publishers worldwide. The Börsenverein (German Publishers & Booksellers Association) did not comment on Plan S, but more than 20 of the publishers that we contacted for our survey joined a statement on Plan S that was signed by over 40

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[20] See also Wiedmer (2015) 149.
[21] See Kalumenos (2011) 154–156; Hauff (2013) 26–28; Siebeck (2014) 41–44; Wiedmer (2015) 150.
[22] Rösler-Graichen, Michael (2018): Ganz nah an der Community. Interview mit Daniel Ropers, CEO von Springer Nature [Very close to the community. Interview with Daniel Ropers, CEO of Springer Nature]. https://www.boersenblatt.net/artikel-interview_mit_daniel_ropers__ceo_von_springer_nature.1488513.html
[23] https://www.coalition-s.org/

HSS publishers worldwide.[24] This statement concludes that there is an "urgent need for transparent dialogue between all parties – funders, associations, libraries, journal editors, individual academics, publishers". While the Austrian Science Fund (FWF) officially supports Plan S, the Deutsche Forschungsgemeinschaft (German Research Foundation/DFG) does not (yet). Plan S therefore has a limited direct impact on German publishers, but clearly shows that the requirements and expectations regarding Open Access to scholarly publications are increasing.

As of March 2019, most publishers from the German-speaking countries are still poorly represented in major Open Access directories,[25] and, with a few exceptions, Open Access publications do not yet play a major role in their publishing programmes. Several Open Access pilot programmes were announced or launched recently by "traditional" publishers, however,[26] and a German pilot project aims to convert 50 scholarly journals from ten (international) publishers from a subscription model to Open Access as of 2019.

An increasing number of publishers are supplementing their websites with information on Open Access and corresponding publication options.[27] At the "Open Access Tage" in Graz and at the Frankfurt Book Fair in 2018,[28] there were dedicated sessions and discussions on Open Access books. Service providers such as Knowledge Unlatched have been positioning themselves as intermediaries between publishers and libraries, and only recently "Quality standards for getting started with open access provision of books" have been published.[29] Small and medium-sized publishers are now increasingly engaging with new requirements and business models.[30] It will be interesting to see how pilot programmes and new offerings pay off; in any case, a more intensive exchange between the various stakeholders has developed recently.

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[24] https://plansinhss.home.blog/

[25] In the Directory of Open Access Journals (www.doaj.org) journals published primarily by De Gruyter, Karger and Thieme can be found; the Directory of Open Access Books (www.doabooks.org) contains titles by De Gruyter as well as Transcript, Böhlau, Verlag der Österreichischen Akademie der Wissenschaften, W. Bertelsmann (wbv), Peter Lang, Barbara Budrich and C.H.Beck. Until recently, De Gruyter was by far the most strongly represented in both directories. In January 2019, Peter Lang placed 1260 titles in the DOAB, overtaking De Gruyter (https://www.peterlang.com/newsitem/164/more-than-1200-peter-lang-titles-freely-available-in-the-oapen-library).

[26] Transcript in Political Science, Peter Lang in Law and Romance Studies, Thieme in the Life Sciences.

[27] For example the publishers Barbara Budrich, De Gruyter, Holzhausen, Karger, LIBRUM, Meiner, Nomos, Schwabe, Thieme, Transcript and W. Bertelsmann (wbv).

[28] See Bergmann/Münch (2018) and the panel discussion "Publishing in Times of the Transformation of Publishing", Frankfurt Book Fair 2017, https://www.youtube.com/watch?v=INsQGNDfqK0

[29] Pieper, Dirk; Fund, Sven; Werner, Karin; Jobmann, Alexandra: Quality standards for getting started with open access provision of books. https://pub.uni-bielefeld.de/record/2932189

[30] See the interview with the Carsten Buhr, CEO of De Gruyter, Buchreport.de: „Umstellen auf Open Access ist aktuell nicht ohne Einbußen möglich" ["Converting to Open Access is currently not possible without losses"], https://www.buchreport.de/news/open-access-nicht-ohne-einbussen-moeglich/

6 Conclusions

"The publishers" do not exist as a homogenous group. In the German-speaking countries there (still) are a large number of service providers for the scientific community who work with very different approaches and business models and are increasingly experimenting. They differ in terms of the size of their publishing houses, subject areas and types of literature, amongst other factors, and therefore have very different attitudes towards Open Access.

Some of the publishers surveyed are opposed to Open Access models and/or have not yet examined them in detail. This may be due to investment costs for new offerings, but also to a lack of information or interest. They see Open Access less as an opportunity than as a threat. However, funder policies and announcements, such as Plan S, that state that they will only accept Open Access publications are rapidly becoming more effective. Scholarly publishers who do not adapt their services to this changing demand, or who are unaware of it at all, are likely to have a rude awakening in the future.

A significantly larger proportion of survey participants are open to discussion and emphasise that they want to adjust their offers. This creates an opportunity to seek more exchange and cooperation with publishers. This could at least slow down the further increase in market concentration in scholarly publishing and make use of the greatest possible variety of independent service providers and their know-how.

Strengthening the cooperation between libraries and funding bodies, with publishers as established and trustworthy partners of scholars, can also help accelerate the aspired transition to Open Access. Last but not least, it could better support a rapid transition to Open Access than the establishment of new providers alone.

The results of our survey provide suggestions for better cooperation between the various stakeholders:

- "Traditional" small and medium-sized publishers should improve the knowledge of their staff with regard to terminology and requirements for Open Access publications, to inform themselves actively and to lay the foundations to meet funding requirements. This includes ensuring the best possible integration and dissemination of Open Access publications and refraining from practices that promote intransparency for authors or readers. Last but not least, they should communicate their services better and make the associated costs more transparent in order to be perceived more clearly as central and indispensable service providers in scholarly publishing.

- Funders should disseminate information on funding conditions proactively and avoid obstacles for (smaller) publishers such as unclear wording, requirements that small and medium-sized publishers cannot meet, and frequent modifications of conditions.
- Universities and libraries should place a stronger focus on small and medium-sized publishers and actively provide them with offers and conditions for Open Access publications, as well as cooperate more closely in establishing infrastructures and standards. Their funding for Open Access should be secured for the long term and processes simplified.

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