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Origins and Developments of the Open Access Books

Andrea Capaccioni

Abstract

The open access books (OAB) are a product of the research that in recent years has gained its place in scientific publishing and open access (OA). Both have gone from initial diffidence (for different reasons) to a growing interest. In the first part of the article, we present the most recent data relating to this kind of publication while in the second one the OAB phenomenon is examined within a more general evolution of the OA. In this way there seems to be a link between the open access monographs and the diffusion of models increasingly distant from the original mission of the OA.

Keywords: open access books, open access monographs, open access, scientific publishing, scientific communications

1. Introduction

1.1 At the beginning

The idea of the book accessible online for free did not originate in the academic world. Michael Hart (1947–2011), a computer scientist, is among the first to propose an initiative in 1971 called Project Gutenberg (PG, <http://www.gutenberg.org/>) [1, 2]. The PG's aim is making literary works in the public domain available on the web, not for profit [3]. The first etext was the United States Declaration of Independence, edited by Hart himself, and then in the following years Alice in Wonderland, some of Shakespeare's works, the Bible and other works. At the beginning, the growth in the number of electronic books was slow. Hart noted that in 1991 only 18 "eText/eBook" could be found online [4]. However, the time was ripe for a change and within a couple of decades, also thanks to the advent of the Internet, the number of online books began to increase significantly [5]. This new phenomenon has aroused the interest of the American publishing world and in particular of the university presses, which were engaged in tackling the relaunch of the scientific book which in those years was experiencing a moment of crisis. A first important initiative was taken in 1994 by MIT Press which made available through its website a free HTML copy of William J. Mitchell's essay, *City of Bits. Space, place, and the Infobahn*, simultaneously putting the paper edition on sale through traditional channels [6]. The experimentation, forerunner of the so-called "hybrid" model still widespread today, had given interesting indications: despite the availability of the free online copy, the printed edition had managed to sell 10,000 copies. In the mid-nineties of the last century, another American publishing house The National Academies Press (NAP) also offered some essays in electronic format for free and later other publishers, such as the Australian National University Press, followed suit.

The need to solve the problems linked to the dissemination of the scientific book convinced university publishers to seek new solutions. Already in 1994, the director of the National Academies Press Scott Lubeck understood that the network, at that time in its nascent state, could be transformed into an important propaganda tool for the publishing house's activities and for the relaunch of monographs [7]. The initiatives promoted in this phase inspired other attempts, but for a few years they remained limited to a small (also from a geographical point of view) circle of academic publishers. The times were not yet ripe.

We have to wait until the first decade of this century to hear about free e-books again. The best-known initiative was proposed by Google which in 2004 launched the Google Print initiative, an online collection of digitized volumes, some of which can be downloaded for free. The Californian company later decided to change the name of the initiative to Google Books and to characterize the project in a more commercial way, transforming it partly into a platform aimed at publishers interested in greater online visibility and in part into a large bookshop virtual dedicated to readers (Google Play). In this period, the term open access books (books OA) began to spread, as we will see presently.

2. Books become “open”

In those same years, the open access movement was also growing [8]. The story is well-known: supporters of the OA had taken a critical view of some large international publishers accused of jeopardizing access to scientific literature. The OA movement's interest has been concentrated on the very beginning on scientific journals [9]. It is enough to examine the founding documents to realize that there are no references to the monographs. The Budapest Manifesto (2001) refers only to scientific articles, in the Bethesda Statement (2003) we find a general indication relating to the publishing industry (“OA publishing”), but the reference to periodical publications continues to prevail, the Berlin Declaration (2003) contains the following words: “Contributions include original scientific research results”, an expression that can also include books which, however, are not explicitly mentioned [10–12]. The reason for this preference is clear: the majority of researchers who write articles do not receive royalties, therefore they can be more available to open access. The authors of scientific monographs, on the other hand, are entitled to the compensation deriving from the sales of the works. The OA dissemination of their publications could deprive them of the compensation. This contrasts with the OA principles that take into account of researchers' rights. In recent years, however, the open access books, also known as open access monographs (OAM), have conquered an ever wider space within the open access movement and the scientific publishing. On the use of the different expressions, see [13, 14].

The growing presence of open access books in the world of digital libraries makes it possible to enrich the offer of academic research products available in OA, thus favoring a more active presence in the field of Open Science of many scholars, especially in the Humanities and Social Sciences (HSS). In this area, as is known, researchers make greater use of monographs as a scientific communication tool.

3. A growing reality

At first, both OA supporters and publishers were a little wary, for various reasons, of OA books (OAB). The change became evident from the present century when some publishers began to consider open access (OA), also thanks to the

support actions of public and private institutions, no longer as a threat but as an opportunity [15].

The purpose of this part is to examine the OAB's growth in relation to the evolution of OA. The OA book, more precisely, began to take its first steps at the end of the first decade of this century and today it is a growing phenomenon [16, 17]. Simba Information, an American media and publishing consultancy, expects a 30% annual increase in open access books production until 2020 [18]. The information that can be obtained from DOAB, the online directory that collects updated data on open access books published worldwide, confirm this trend: during 2017 there were about 8500 OA books (or book chapters) published by 224 publishers, in February 2018 the number of the first ones had risen at 10853 and that of publishers at 254; in July 2020 there was a further increase with 29,422 academic peer-reviewed books from 389 publishers [5, 19, 20]. DOAB listed 2099 OA books published in 2018 with an increase of 38% from 2017 [21]. The data provided by AAUP (Association of American University Presses, www.aaupnet.org) also indicate a growth, although not linear: if we compare the survey reports Digital book publishing in the AAUP community of 2012 and 2017 we note that the publishers engaged in the publication of "online full-text open access" and "OA Content" went from 25 to 38, or from 31–61% of the total [22]. Numbers of the "fiscal year" 2016 "showed that 76% of presses received less than 15% of their book revenues from ebooks. Reported FY2018 show that 40% of presses are now receiving more than 15% of their book revenue from ebook format sales or licenses" [23]. In Spain, the percentage of publishing houses that published OA monographs went from 28% in 2016 to 59% in 2017 [24]. According to Simba information, there will be greater collaboration between publishers and institutions in the OAB sector in the coming years. An example is PEERE (<http://www.peere.org/>) a European Commission funded initiative that brings together various institutions belonging to the academic world and publishers such as Springer Nature, Elsevier and Wiley (and others) united in an effort to improve the quality and sustainability of peer review practices. Also, noteworthy is the HIRMEOS project (High Integration of Research Monographs in the European Open Infrastructure), supported by the European Commission in the context of the Horizon 2020 initiatives and by OPERAS (<http://www.hirmeos.eu/>), and the Open Access books on JSTOR initiative. HIRMEOS project aims to create coordination between the different subjects (universities, publishers, etc.) that deal with OA books, in particular for the HSS, promoting a wider integration in the European Open Science Cloud (EOSC). It involves five publishing platforms: OpenEdition Books (FR), OAPEN Library (NL), EKT ePublishing (GR), the German Göttingen University Press and Ubiquity Press, an English OA publisher. JSTOR, part of ITHAKA not-for-profit organization, has launched an initiative called Open Access books on JSTOR which consists in hosting within its database OA books published by some qualified university publishers [25]. What has been said could suggest a recent phase of the scientific monograph and perhaps the exit from a critical period that has now lasted for years [13, 26, 27]. As is known, the causes of the crisis of this research product are different: the preference accorded to the scientific article in an increasing number of disciplinary sectors; the high costs of producing paper publishing; the cuts suffered by the budgets of academic libraries, etc. [28, 29]. The picture must be completed by recalling that the sales of digital editions of scientific books, grown for a few years, have been reduced in recent times and overall they have not been able to recover the drop recorded in the paper market. One can better understand the lucky moment of the OAB if it is placed within the general state of crisis of the academic monograph. In other words, the use of the OA model by publishing houses must be seen as one of the attempts to revive a kind of publication in difficulty. Book processing charge (BPC), as well as

article processing charge (APC), is the fee that researchers pay publishers for making their work available in OA. Other factors then convinced publishers to invest in this sector: the observation that, despite everything, monographs remain one of the leading products of research in some disciplinary sectors [30–33]; the renewed attention from states (mainly European and the western world) and institutions (public and private) in promoting policies and allocating OA funding; or even a greater visibility [34]. Let us not forget that in many HSS areas the monograph is however considered one of the most relevant communication channels of the scientific activity's results and it is of considerable importance for the researchers' evaluation [35]. The support of public institutions, which materialized with the approval of norms, rules, guidelines, has helped to revive OA within the world of research. OA policies demonstrate two main limits. In the first place, they are unevenly spread: Europe and a part of the Western world still remain privileged, while the situation in emerging countries is more problematic. And then they still pay little attention to open access monographs, even if there have been signs of openness in recent times.

4. New protagonists

From the beginning, the OAB sector has been characterized by the active role that publishers, associations and institutions have played within it, as shown by the events of some initiatives of the early 21st century [17]. The OAPEN Foundation (<https://oapen.org/>), born in 2008 under the name of Open Access Publishing in European Networks, is one of the first projects to deal with the development of OA books. Since 2011 OAPEN has been working to increase the standards of OAB, has promoted training activities and developed guidelines on quality assessment, on licenses, on the management of metadata. Among the founders together with institutions, such as the universities of Amsterdam and Leiden, the library of the University of Utrecht, the Academy of Sciences, the National Library of the Netherlands, we find the Amsterdam University Press. AUP is a publishing house founded in 1992, initially linked to the University of Amsterdam, which has a solid propensity for the publication of OA books (currently covers about a fifth of the entire production) and OA journals, and which has given life in recent years to a collaboration with partners such as Knowledge Unlatched (<http://www.knowledgeunlatched.org/>), an initiative created to encourage closer collaboration between academic libraries and publishers in supporting OA books (today transformed into a for-profit company) and the Association of American University Presses (AAUP). It may be useful to remember that Eelco Ferwerda, an active OAB supporter, started working at the Amsterdam University Press (AUP) to move to the presidency of the Association of European University Presses (AEUP) and finally to join the direction of the OAPEN Foundation. There is also the Open Access Scholarly Publishers Association (OASPA, <https://oaspa.org/>), founded in 2008, which includes among its members non-profit and profit scientific publishers and different institutions. OASPA began to take an interest in OA books starting from 2011, among its activities we remember the organization of seminars dedicated to different aspects of digital publishing, see for instance [36].

SPARC Europe (<https://sparceurope.org/>), one of the OASPA members, and OPERAS (Open Access in the European research area through scholarly communication, <https://operas.hypotheses.org/>) must also be cited. SPARC Europe, the continental division of the Scholarly publishing and academic resources coalition (SPARC, <https://sparcopen.org/>) active since 2001, brings together publishers, institutions and universities with the aim of supporting a new approach to scientific

communication, in particular to the “networked digital environment”. OPERAS presents itself as a “European research infrastructure” interested in the development of open scientific communication, particularly in the social sciences and humanities. Among the partners we find some European universities and research centers but also publishers such as the UCL Press and projects such as Knowledge Unlatched. OPERAS is part of a larger OA support project called OpenEdition (<https://www.openedition.org/>) created through an online platform that brings together services dedicated to scientific journals (Revues.org), publishing OA (OpenEdition Books), etc. OpenEdition is promoted by the Center for Open Electronic Publishing (Cléo), a French organization supported by Centre national de la recherche scientifique (CNRS), Université d’Aix-Marseille, EHESS, Université d’Avignon, and is committed to developing digital publishing. In recent years, the number of publishers (profit and non-profit) who have decided to focus on OAB has grown significantly. The Directory of Open Access Books (DOAB) currently lists about 400 publishers who dedicate themselves to the publication of OA books (and this is only a part, albeit the most qualified, of the OAB publishers). Some studies proposed dividing the companies engaged in the sector into four types. In the first one we find traditional publishing houses such as De Gruyter, Palgrave MacMillan, Springer, Ingenta who have started to invest in this sector by drawing on public funding or by adopting the book processing charge (BPC) model. We also include in the first type publishers who offer OAB collections contained in some full text bibliographic databases (e.g. Project MUSE, which offers the consultation of a few hundred OA books of university presses). The second type involves university presses with a longer tradition (e.g. Cambridge University Press, Oxford University Press) and publishing initiatives linked to often non-profit institutions and learned societies (e.g. The Economic History Society, The Modern Humanities Research Association). The third type includes the new generation university presses mainly oriented towards open access (e.g. UCL Press, etc.). The last kind includes the so-called academic-led presses (ALP), a label that collects both non-profit (in certain cases founded and directed by scholars) and

profit publishing initiatives (e.g. Open Library of Humanities, Ubiquity Press, IntechOpen) [28, 37].

5. A new phase of OA

The publishers’ growing involvement in the development of OAB, supported by public and private institutions (associations are included), represent a phenomenon not to be underestimated as it provides significant indications on the current phase of the OA. It is sufficient to know even only superficially the history of the OA movement to realize something is changing. Over the course of thirty years, three protagonists emerged: publishers, institutions and supporters of open access. At the beginning, the publishers were wary, and the institutions had not expressed a great interest in the phenomenon, perhaps considering it an internal issue in the academic world. The OA supporters had right away.

sustained the need to promote alternative methods for the dissemination of the scientific literature, paying particular attention to the articles. This preference is based on reasons of economic sustainability: the scholar who makes his article available in OA does not suffer economic damage (in general) since he does not receive compensation for its work; in exchange however, he obtains greater visibility and the guarantee of fair and free access to own scientific production. The OA publication of a scientific book, on the other hand, entails more demanding consequences both for publishing houses, which have to sustain more substantial investments,

and for authors, who have to deal with the reduction in revenues deriving from sales. Following these arguments, the OA movement ended up neglecting the monographs as evidenced by the fact that to date a strategy dedicated to them has not been developed, as has happened for the deposits with the green road and for the journals with the gold road [9].

Over the years, something has moved within the groups. OA supporters have faced problems such as the unsatisfactory rate of penetration of their theses within the academic community and an internal division within the movement on choosing the most suitable economic model for journals in their transition to OA. These (and other) uncertainties weakened the OA movement's action and favored the strengthening of the role of the other two protagonists (institutions and publishers) [38]. The institutions finally understood the social benefits of open access and the importance of reforming the current research funding system characterized by a high worldwide public funds investment. Publishers have not merely accepted the OA model, transforming it into an opportunity for the relaunch of scientific publishing, but now they are part of the open access decision makers. Jean-Claude Guéron distinguished the publisher's approach to OA into several distinct periods [39, 40]. In the first one, from the post-war period to 1970, there was a robust recovery in academic activities throughout the western world, within which the publishers have carved out a role of "powerful actors in scientific publishing". The next phase (1970–1995), the last one in which the use of paper prevails, is characterized by the emergence of some large publishing houses and the first signs of the crisis of scientific communication (monopoly, growth in journal prices, etc.). The third period (1995–2005) coincides with the advent of the Digital age: the publishing world begins to deal with the new reality between openings and errors and among the latter we must count the closure towards the OA ("Big Deals dominate this period"). The last period, from 2005 to the present day, is characterized by the gradual absorption of open access within publishing strategies: "large commercial publishers have gradually added Open Access to their business plans, either as full OA journals, or more commonly, by opening their subscription journals to the possibility of making individual articles OA (hybrid-journals)" [39].

Today the scenario shows an alliance between public and private institutions and publishers aimed at supporting OA. A sort of open access that has been defined as "commercial", while the community of scholars, librarians and experts who had given birth to the OA is weakened in particular as regards the ability to influence choices. Joachim Schöpfel wrote that we are witnessing the transition from a "bottom-up structure" of the OA, based on the interest of researchers, to a "top-down" one in which the lines of action are increasingly influenced by the world of institutions and publishers [15]. According to this readings, the "community-driven model of OA", developed since 1990 and to which we owe the realization of the gold and the green road, will enter into crisis after a few years. The PLOS initiative is significant in this regard. In 2000 a group of scholars decided to launch an appeal to urge the academic and publishing world to make scientific articles available online and free in public archives (e.g. PubMed Central). The initiative had been an overwhelming success but had been unable to transform some habits: libraries continued to subscribe to the expensive of scientific journals subscriptions and the researchers, many of whom engaged personally in the battle for OA, did not stop collaborations with closed-access periodicals. We cannot speak of the end of the OA, but of a "new chapter" of its history. A chapter that tells the discovery in recent times, we are at the beginning of the 21st century, of the economic potential of OA. For this reason, some experts and scholars have spoken, as anticipated, of "commercialization" of open access [15, 38]. However, we believe it is reductive to think of this OA phase in terms of a mere attempt at economic exploitation: it is more

useful to try to deepen some aspects. It should be remembered, for example, the lack of interest that the academic world continues to have today in the direction of the construction of a scientific communication system oriented towards the values of openness. This attitude weakens the positions of the OA movement and, on the other hand, in particular consolidates the role of publishers as we have seen in the OA books developments. Among the first documents that sanctioned this new alliance, it is customary to indicate the final act of June 2012 of the Working group on expanding access to published research findings, coordinated by sociologist Janet Finch and established by the British government. The newness introduced by the Finch report are two: the broad acceptance of OA by academia (and public institutions) and the preference for the option for a “gold OA” based on the article processing charge (APC). In other words, the opening of institutions towards open access was balanced by a decision appreciated by publishers (well represented within the working group) by the choice of an OA model compatible with business strategies.

The Finch report will subsequently influence other international initiatives including the Max-Planck-Gesellschaft OA2020 (2016) whose purpose is to allocate economic resources destined for the scientific journals subscriptions to the financing, through APC, of OA publications; and the European Commission Horizon 2020. The adoption of this kind of OA is not, of course, without consequences. If the growth of the commercial dimension of open access is sustained, the prerogatives of publishers prevail (also with the institutions’ support). A scholar wrote that what the European Commission is doing is nothing more than finding “new ways of channeling public funds into private hands” [41]. New economic barriers are then introduced within the circuit of scientific communication, in particular for that part of the world (global South) which does not possess adequate financial means. This last aspect has aroused much debate in recent times. Leslie Chan (University of Toronto Scarborough), one of the signatories of the BOAI declaration, points out that the discussion is now moving almost exclusively on economic aspects or on the choice of models to be adopted to support OA articles and monographs [42–44]. In this way, the costs of open access publications are not reduced and there is an increase in disparities. According to Chan, however, the OA movement, created to counter the emergence of inequalities between the South and the North of the scientific world, has the obligation to continue promoting actions that favor access to resources (research products, communication channels between scientists, databases, etc.). In this phase, the original open access purposes would instead be overshadowed by the preference given to models mainly interested in the commercial exploitation of this kind of publishing resources. What developments does the future hold? It is not possible to address this issue here, however, we can indicate some attempts that propose alternative approaches.

Among these, we want to mention the Appel de Jussieu published in France at the end of 2017 by a group of experts [45]. The document aims to promote “bibliodiversity”, i.e. the various innovative forms of scientific communication. The bibliodiversity takes into account a wider involvement of subjects operating in scientific publishing and also of new public investments to be allocated to the creation of web platforms and infrastructures for the open dissemination of research results. The appeal arises in response to the already mentioned OA2020 with respect to which it intends to promote a model that is not limited to the transformation of journal subscriptions funds into APC: “We find it necessary to foster an open access model that is not restricted to a single approach based on the transfer of subscriptions towards APCs (publication fees charged to authors to allow free access to their articles)”.

This position is already present, the sign of a mentality that is changing, in previous documents such as the Joint COAR-UNESCO Statement on open access (2016) in which we read: “Some organizations are promoting a large-scale shift

from subscriptions to open access via article processing charges (APC's). However, there are a number of issues that need to be addressed in this model" [46]. The most relevant novelties of Jussieu's appeal do not consist only in the encouragement expressed towards alternative ways of spreading research products and in the proposal of support the innovation in scientific publishing but also in the attempt to relocate the scientific community to the center of OA decision-making processes. The French appeal, citing a 2015 League of European Research Universities (LERU) document, explicitly states that: "funding should go to research, not to publishers!" [47]. Even the Plan national pour la science *ouverte*, made public by the French Government in July 2018, moves in this direction, it is no coincidence that Jussieu's appeal is cited: "The scientific community must regain control of the publishing process in general, in keeping with the principles promoted by the Jussieu Call for Open Science and Bibliodiversity. It must direct its efforts towards virtuous stakeholders working to develop a less concentrated publishing environment that adheres to the principles of open and ethical access, especially in terms of transparency, governance and intellectual property" [48]. If read out of the context of the whole document, the statement may suggest the recognition of extensive autonomy of the scientific community, in reality, a little further in the text it is explained that the French State is responsible for managing higher education in the country and also the financing of all initiatives capable of promoting the transition to open science. Therefore, new balances seem to be envisaged between the parties interested in the future of OA.

6. Conclusion

The chapter examined the phenomenon of open access books. Its aim is to show in particular how they have earned a place in scientific publishing and in the field of open access. At the beginning of the chapter the origins of so-called "free books" and a few years later of open access books were briefly presented. This part was followed by an exposition of the evolution of the "OAB" in recent years. In the second part of the chapter, OA books were investigated within a more general evolution of OA. The intention is also to understand how their growing presence in the world of digital libraries has made it possible to enrich the offer of the academic research products available in OA, especially in HSS.

Conflict of interest

The author declares no conflict of interest.

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