

# Open science funding strategy of the Bibsam Consortia in Sweden

Wilhelm Widmark

Library Director, Senior Advisor on Open Science to the President, Vice Chair Bibsam consortia, Stockholm University

# The Bibsam Consortium

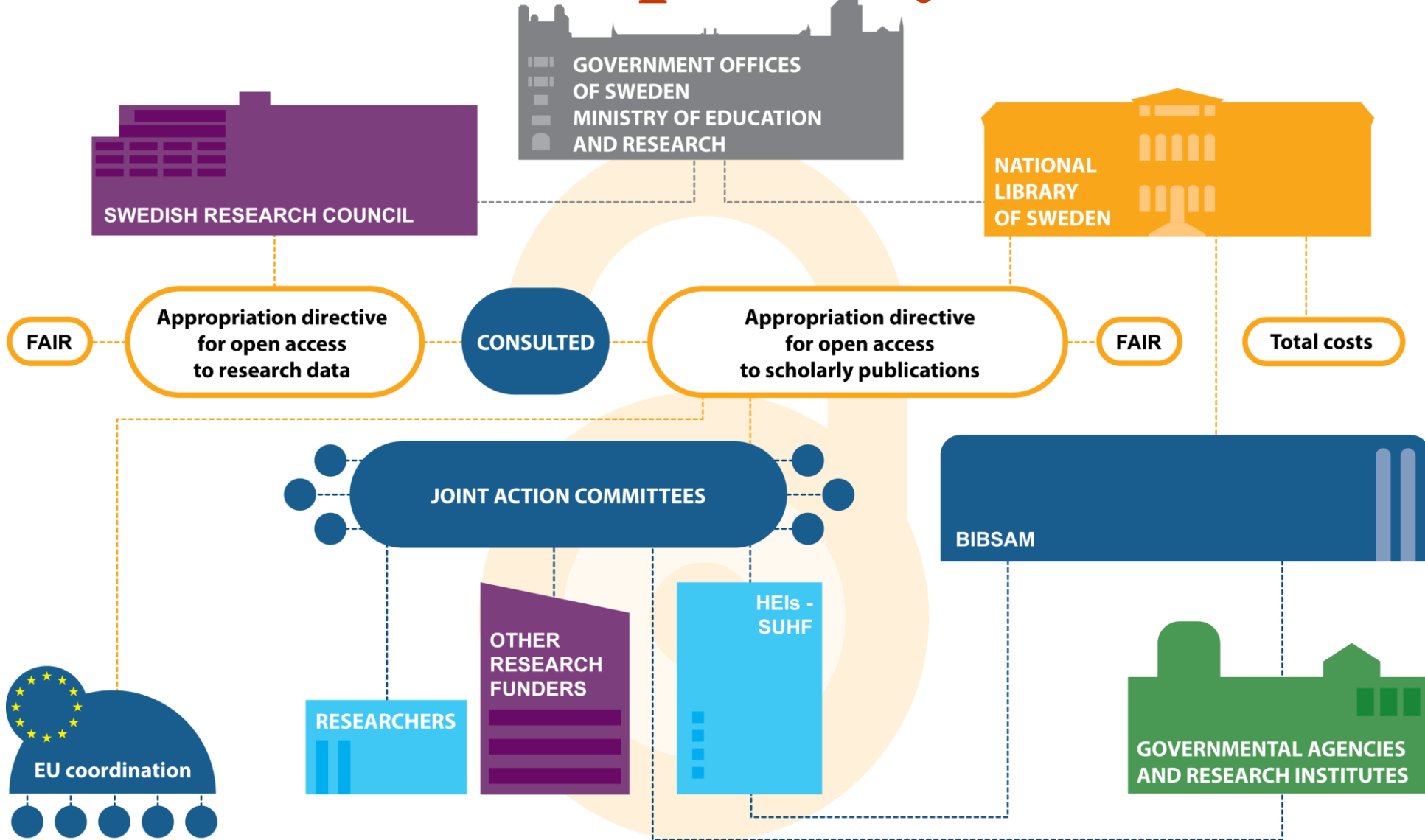
- 95 institutions
- Around 30 transformative agreements
- 52 million € yearly turnover  
(68% of the total expenditure for scientific publishing)
- 16 500 Open Access articles yearly
- Administrated by the National Library of Sweden

*The National Library of Sweden shall **promote** and **coordinate** the work of introducing open access to scholarly publications.*

- Government Directive 2021



# Swedish OA Landscape - Key Stakeholders



# Council conclusions– EU

- *High-quality, transparent, open, trustworthy and equitable scholarly publishing*
- Calls for **immediate and unrestricted open access** in publishing research involving public funds
- The **costs of paywalls to access** and publish articles are becoming **unsustainable**
- Calls on the member states to **support** policies towards a scholarly publishing model that is **not-for-profit**, open access and multi-format, with **no costs for authors or readers**
- Encourage member states to support the pilot programme **Open Research Europe** to create a large-scale open access research publishing service

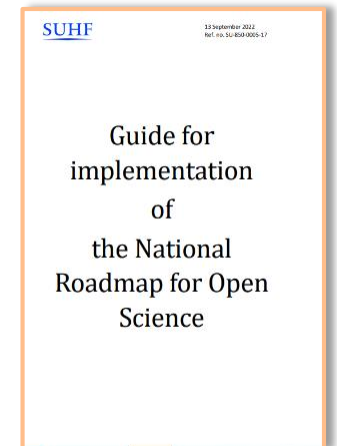
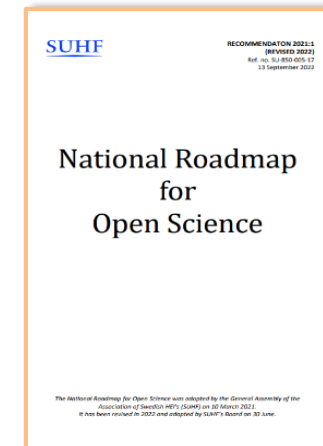
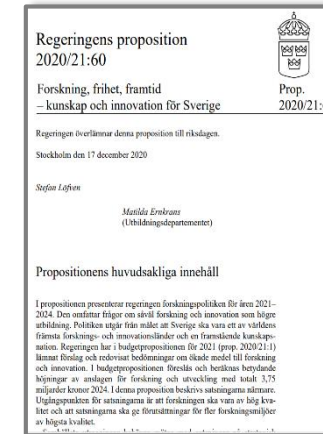


Council of the European Union, Brussels 23<sup>rd</sup> May 2023

# Convert to an Open Science system by 2026

"...scholarly publications, that are the results of publicly funded research should be published with immediate open access as of 2021. As for research data, **the transition should be fully implemented by 2026...**" (2020)

- *National guidelines for Open Science (2024)*
- *Roadmap for Open Science (2021) & Guide for Implementation of the Roadmap for Open Science (2022)*
- Guiding principles and recommendations



# Beyond the Transformative Agreements

- Aim

To work out a strategy for the consortia when negotiating new agreements after 2024. The strategy will be mandated from the management of the universities.

The group will also investigate alternative publishing routs and give suggestions on such.

- Time frame

From Mars 2021 till December 2023.

- Membership

University management, researchers, funders and negotiators



# Action plan – Bibsam Consortium

- The aim is to facilitate the open publication of scholarly results, to bring about a redirection of payment streams from a subscription-based to an open access publishing system and to achieve transparency, an overview of and reduced expenses for scholarly publishing.
- that the Consortium **should not sign agreements for reading and publishing in so-called hybrid journals**, and instead only negotiate for publication in open access journals; this approach should be implemented from 2026 and apply to all open journals, regardless of publisher
- that **new pathways to open publishing are promoted** and supported and alternative business models are developed, and that researcher-driven journals that want to migrate from traditional publishers to other platforms are supported
- that publication occurs under an **open license**, in accordance with the **FAIR principles**, and that copyright conditions to promote open access, for example via so-called **secondary publication rights**, are explored



Bibsam Consortium - The National Library of Sweden negotiates licence agreements on behalf of Swedish universities, university colleges, as well as public agencies and research institutes. 95 institutions are a part of the Bibsam Consortium.



# Cooperation with the funders

**Recommendation 1: A multi-stakeholder group is appointed for further consultation**

Through the transformative agreements the universities took over all the costs for both publishing and reading

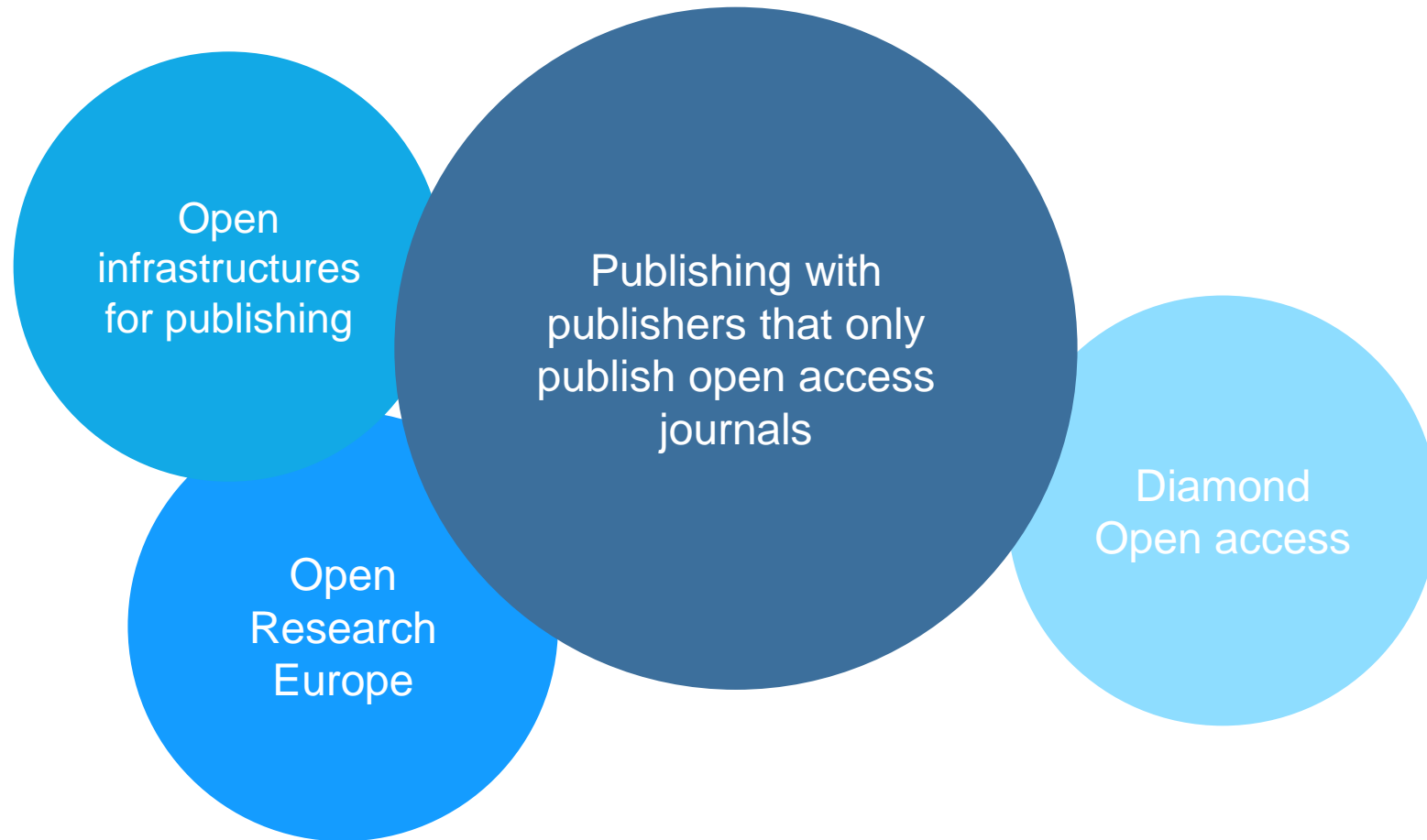
All Swedish funders has an OA-mandate

Shared responsibility between research funders and universities for financing publication costs.





# Openly Available Publishing System



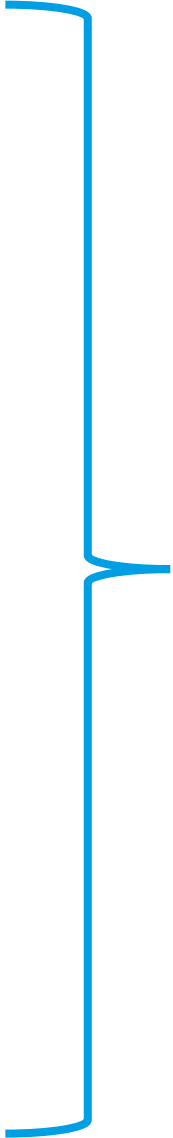


**36 million crowns/year**  
Period 2024-2025  
Continues 2026-2029

+

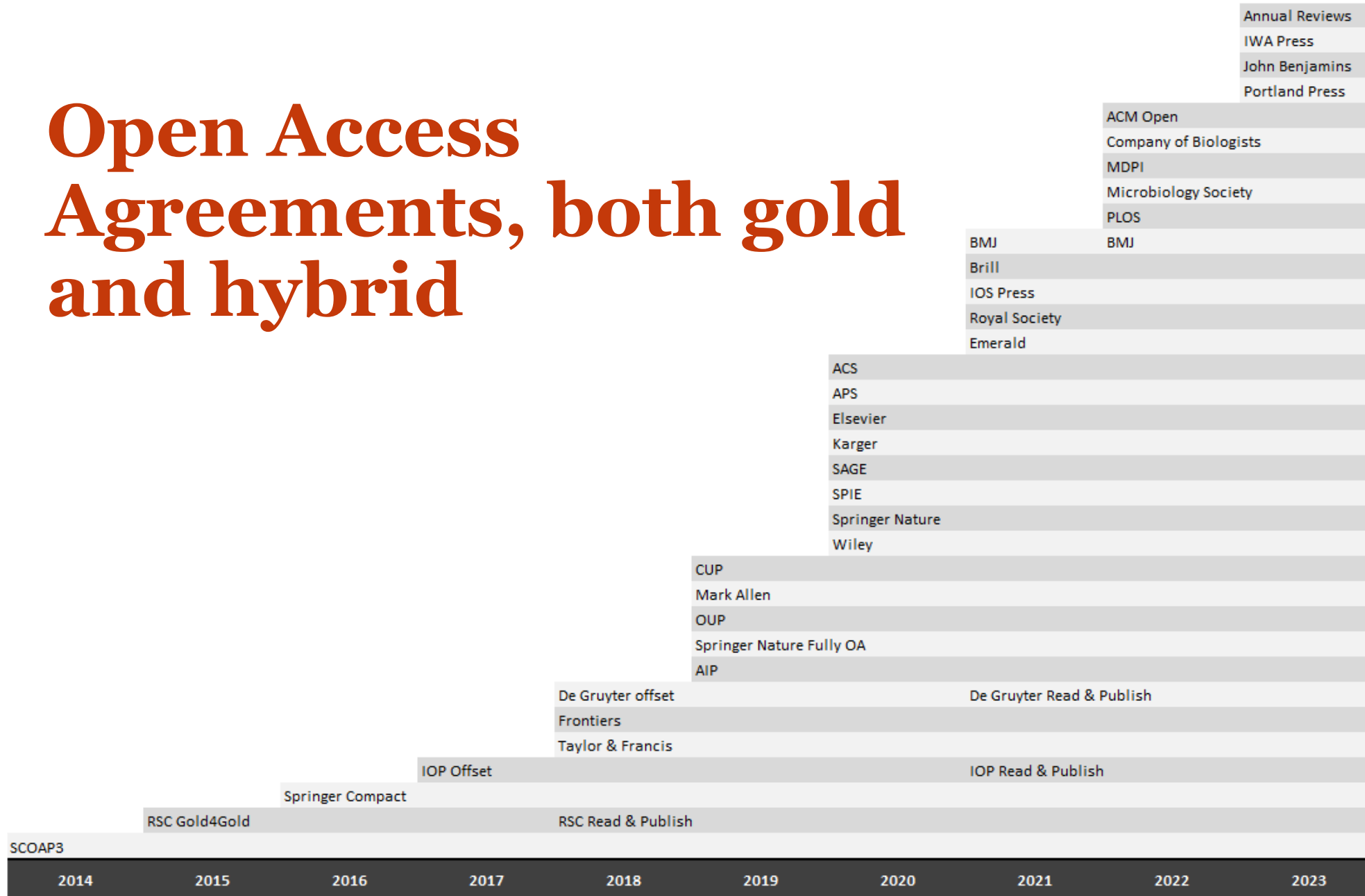


**Ca 28 million crowns/year**  
New period 2026-2029

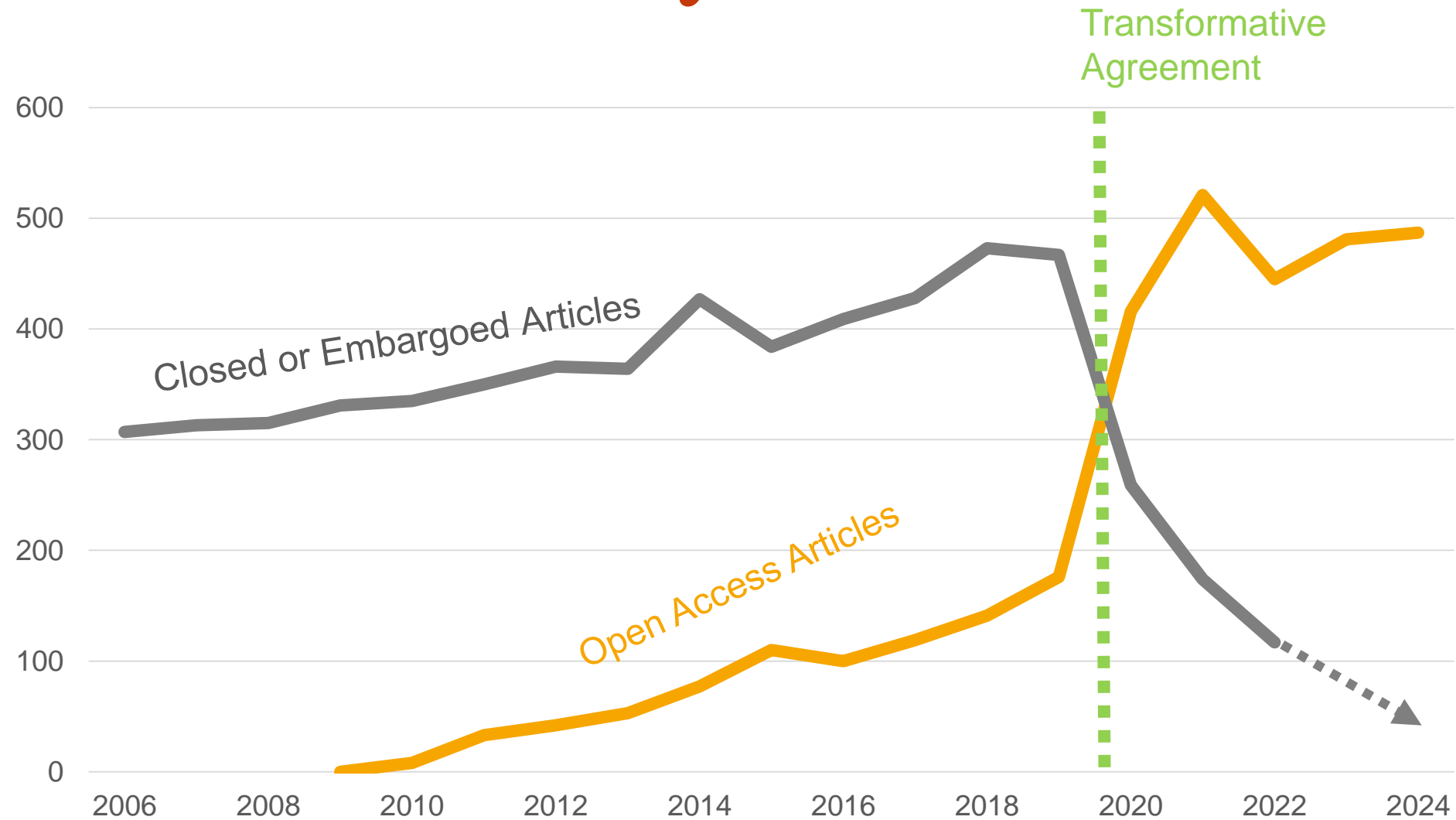


**Totalt for the period 2026-2029  
ca 64 million crowns/year**

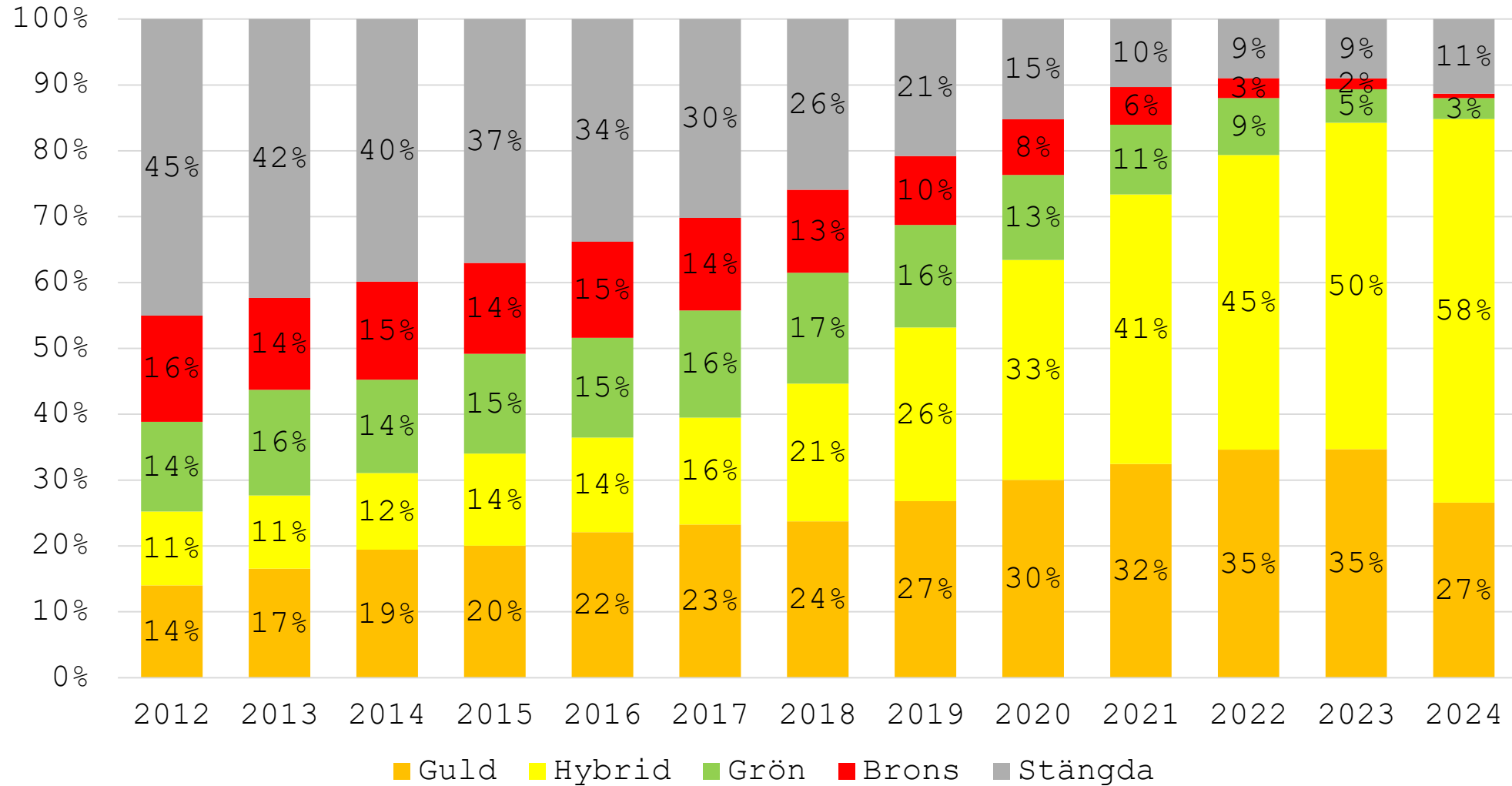
# Open Access Agreements, both gold and hybrid



# Publishing Example: American Chemical Society



## Andelen öppet tillgängliga refereegranskade tidskriftsartiklar på Stockholms universitet



*Data är från DiVA, OpenAlex och manuella sökningar. 2024 är inte fullständig. Uttagen 2024-11-18.*

*The transformative agreements are intended to shape a path to transform the system, not a new business agreement for the publishers.*

Widmark, W. (2024). How Can We Get Beyond the Transformative Agreements: A Swedish Perspective.  
*Revista Española de Documentación Científica*, 47(4), e402.

# Transformative Agreement Lifecycle

Fully Open Access Publishing

Publishing as a Service

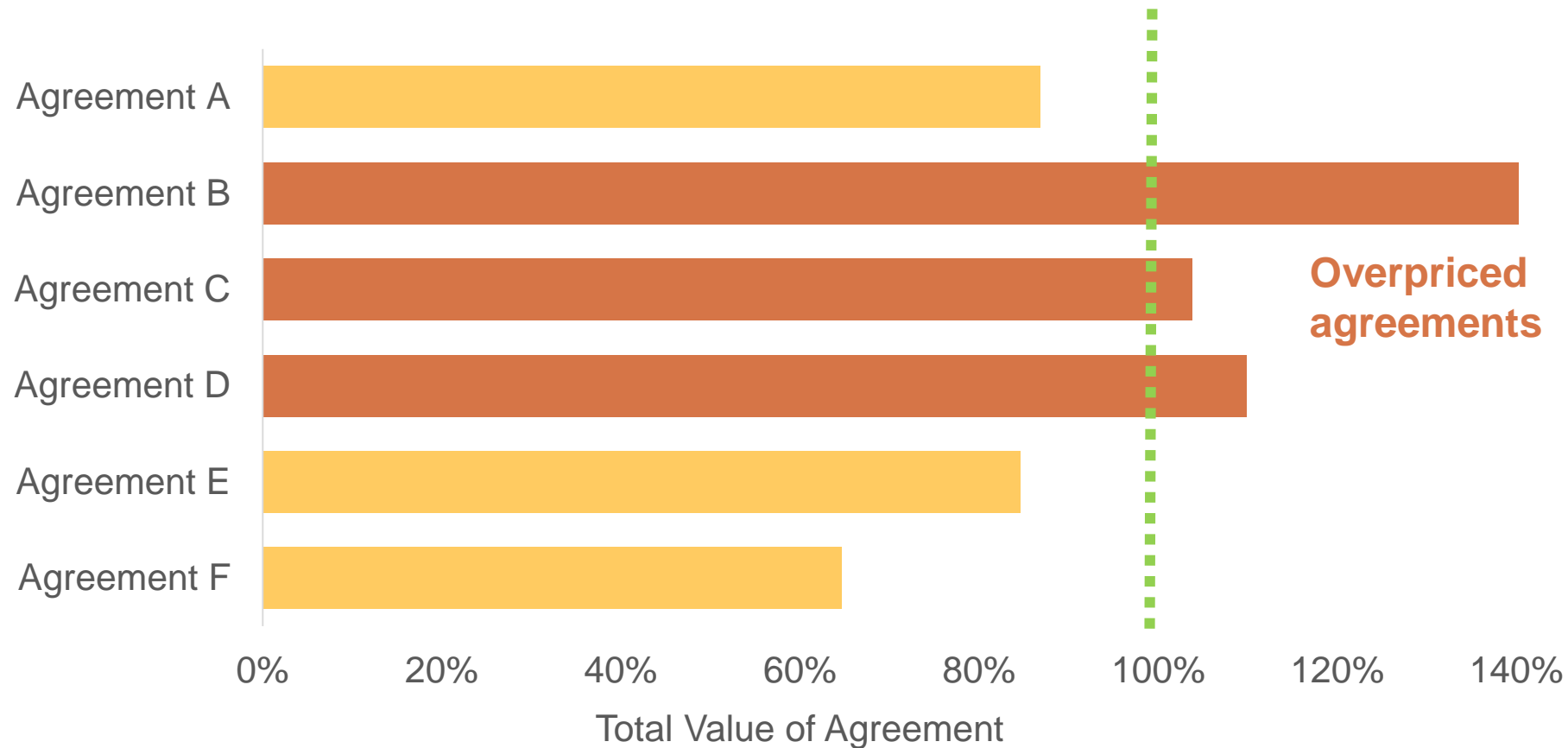
Read & Publish

Read Only

“Up or Out”

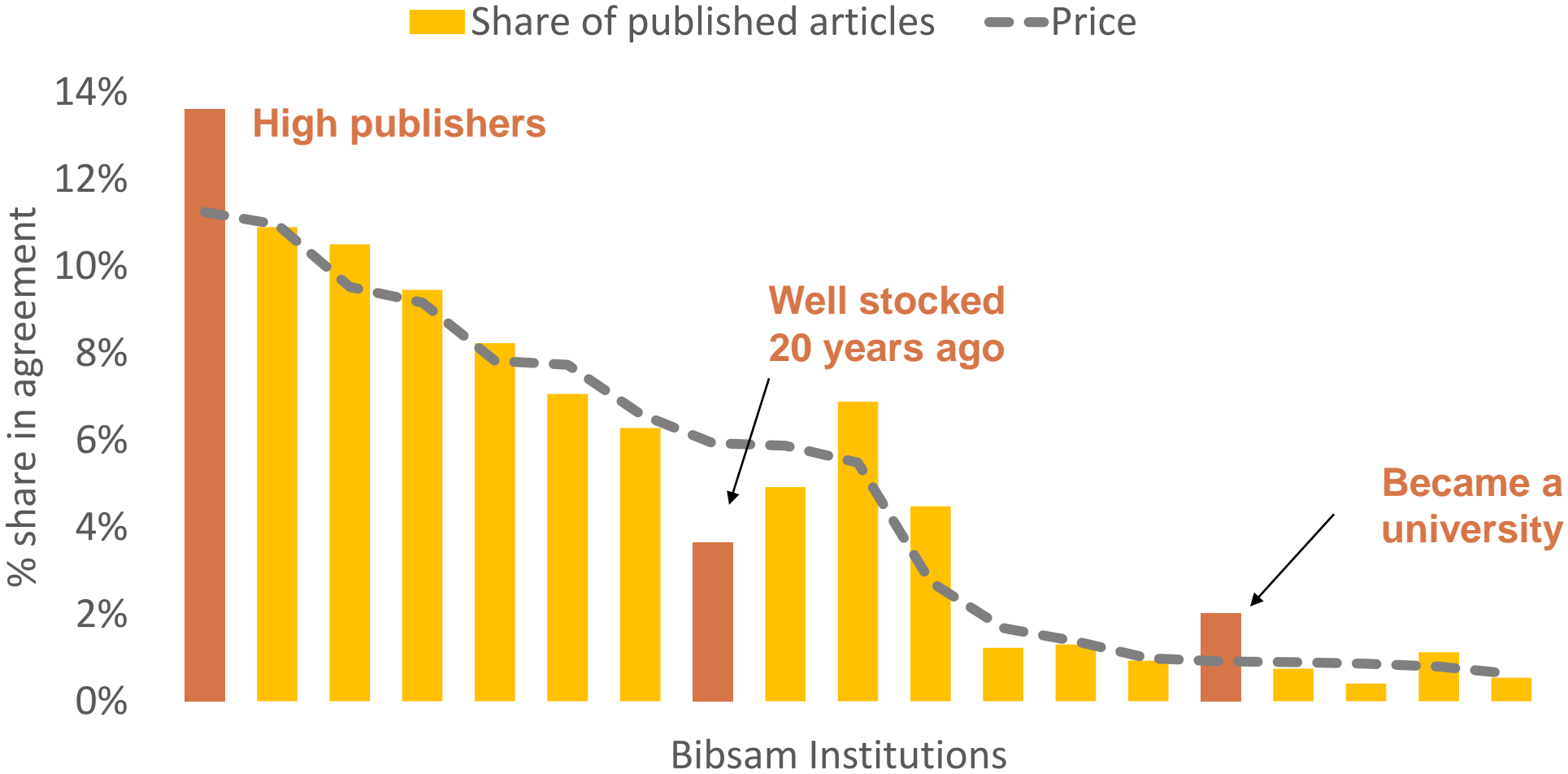
# Agreement – Old Prices

Agreement Value vs List price of published articles



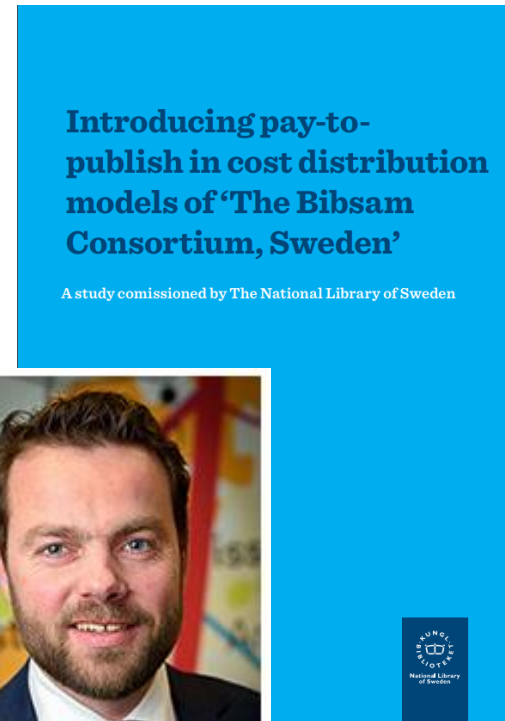


# Institutional- Unbalanced price distribution



# Cost distribution

- Roberts Consultancy 2019
- A fair price model
- Recommendations for cost redistributions
- Model C:
  - 10% entry fee (i.e. Read Fee)
    - Reflect institution size
  - 90% publish fee
- More publish = more fee
- Less overall impact if more agreements are redistributed at the same time



# 90/10 Application Example

100 000 € Read & Publish Agreement



- A large university**
- 200 articles (13,3%)
  - 2 500 FTE (6,3%)

95%

5%



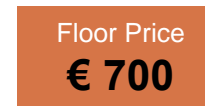
- A university college**
- 20 articles (1,3%)
  - 900 FTE (2,3%)

84%

16%



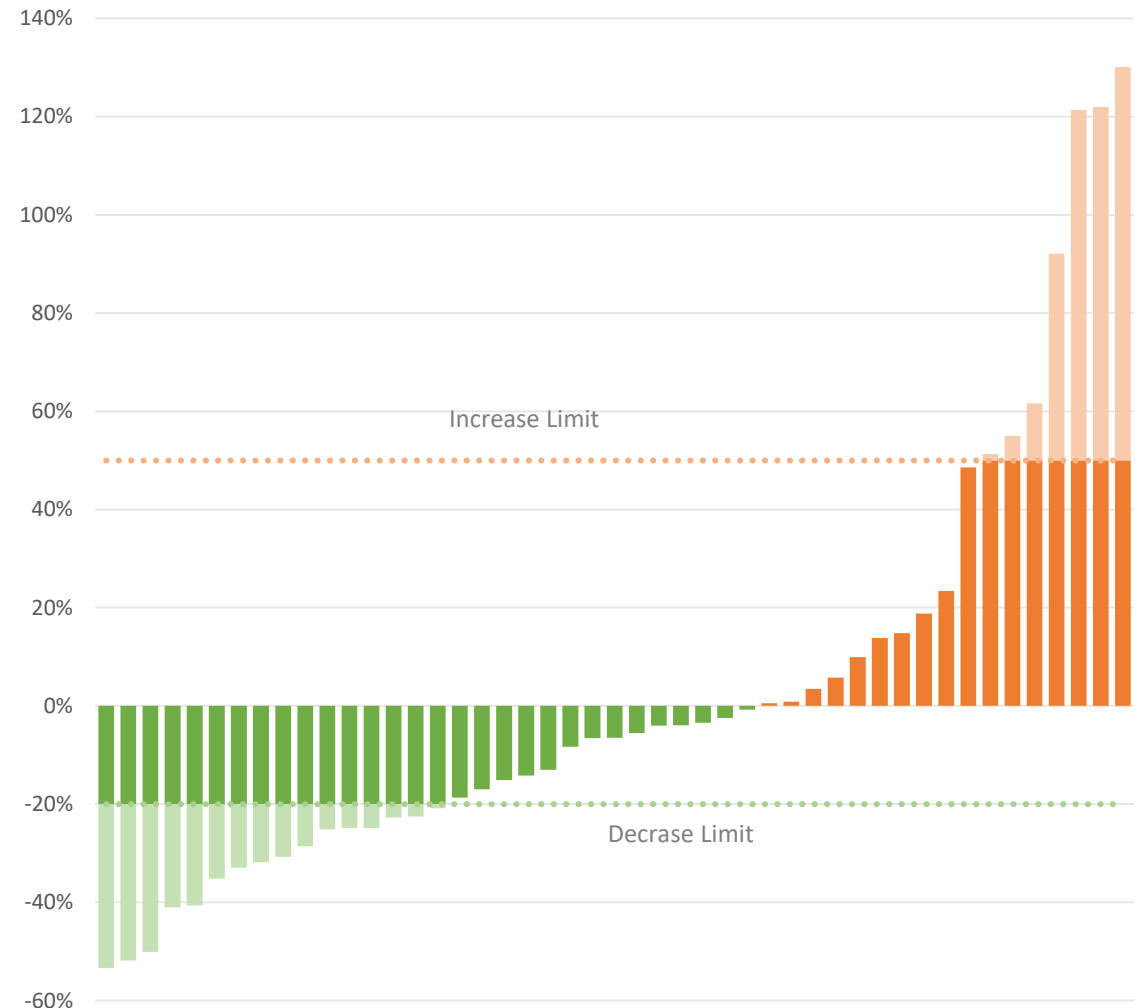
- Small research institution**
- No publishing (0%)
  - 50 FTE (0,13%)



# Dampeners

<i>Floor Price</i>	<b>Minimum</b>
<i>Price increase limit</i>	<b>+50%</b>
<i>Price decrease limit</i>	<b>-20%</b>

- *Why +50 and -20%*
- *How much impact from dampeners?*
- *Is reading not important anymore?*
- *Why not factoring in the students?*



## How can we get a transformation

- International discussions and cooperation
- Cooperation with all stakeholders in the countries
- Don't just invest in transformative agreements
- Try to change the system to bring in competition and innovation
- Investigate and build alternative publishing routes
- RRS strategies
- Put pressure on the publishers to be transparent about their cost models
- Be ready to walk away from the negotiation table
- Take the ownership of the publishing system back to the academia
- It is the researchers behavior that can change the system
- If we don't act there will be no transformation
- Policy and implementation

Thank You!  
[Wilhelm.widmark@su.se](mailto:Wilhelm.widmark@su.se)