OA Insight

6 Important Questions Publishers Must Answer to Refine OA Business Models

Learn how OA Intelligence from CCC provides data-driven insights to help answer your toughest business questions.

As publishers continuously evaluate their OA business models, they must answer many strategic questions to inform them of their next steps. Data analysis is key to answering these questions, but the challenge often lies in getting quality data. Often, data are not structured or disambiguated to give accurate, trustworthy directions. With decisions that can feel so daunting, publishers are on the hunt for reliable data insights to justify strategy and strengthen customer relationships.

This OA Insight highlights six questions publishers often ask as they fine-tune OA models, and it explores how OA Intelligence can provide high-quality, data-driven analysis to support decision-making.

Trustworthy insights are only possible with high-quality data.

OA Intelligence features a sophisticated AI-enabled affiliation matching process. All manuscript metadata and associated transaction details are processed automatically to connect as many historical articles (both OA and subscription) as possible to Ringgold IDs. This allows publishers to reliably identify institution affiliations and funder relationships for historically published manuscripts; enabling strategic decision-making based on accurate and disambiguated data. OA Intelligence's automated technology reduces time consuming manual efforts for sales, pricing, and operations teams, providing a tool publishers can rely on to do the heavy lifting.

① How do I know what OA model(s) will work for us?

As publishers consider business models to transition to OA, many ask: "Which mix of models is right for us and our customers?" Transformative agreements? Subscription-funded models like Subscribe to Open? Direct deals with funders? A blend of each? To decide on their direction, publishers must have a view into the full picture of their historical publishing program.

How OA Intelligence Helps Answer This Question

With OA Intelligence, publishers can review all historical publication data — both OA and subscription — in one place for a comprehensive look at the state of their current publishing program. This big-picture view will quickly surface actionable insights to help sustainably evolve your OA business. Specifically, OA Intelligence's "Prepare" step provides a look at key data points across institutions such as journal volume, article type, average APC, and revenue source to signal what type(s) of model(s) make the most sense for a publisher's business.
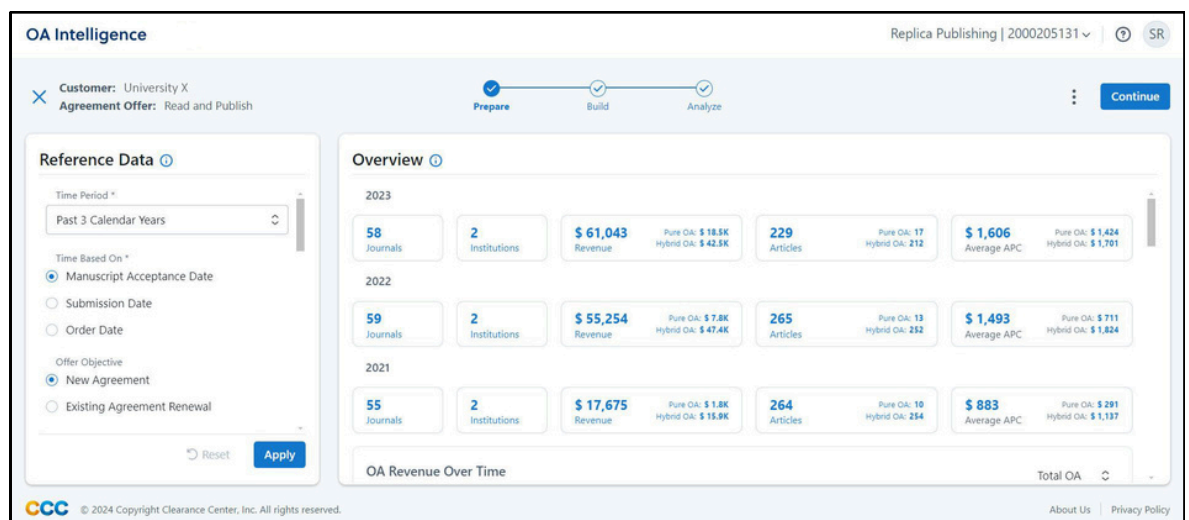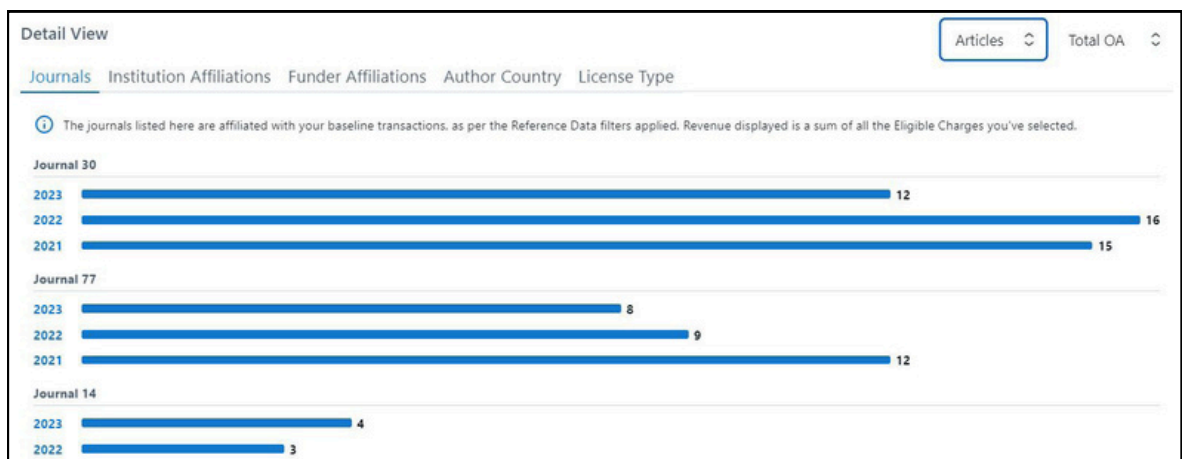

② If I want to propose a deal to a given institution or consortium, what journals should I include based on that organization's historical activity?

Sales teams must know the historical relationship with their customer so they may propose a sensible offer from the start. This is often a challenge for teams who struggle to pull all relevant data together in a way that quickly provides an accurate historical view. This lack of complete or reliable data often results in lengthy, messy negotiations and sales churn.

How OA Intelligence Helps Answer This Question

OA Intelligence allows publishers to quickly view the historical transactions relevant to their customers using robust, dynamic filtering options. These filters enable a comprehensive view of the historical relationship so that when publishers begin to model a new or renewal offer, it includes what matters most to the customer, including their most valued titles. The detailed data view provides information on journals as well as institutional affiliation, authors by country, license type, and more.
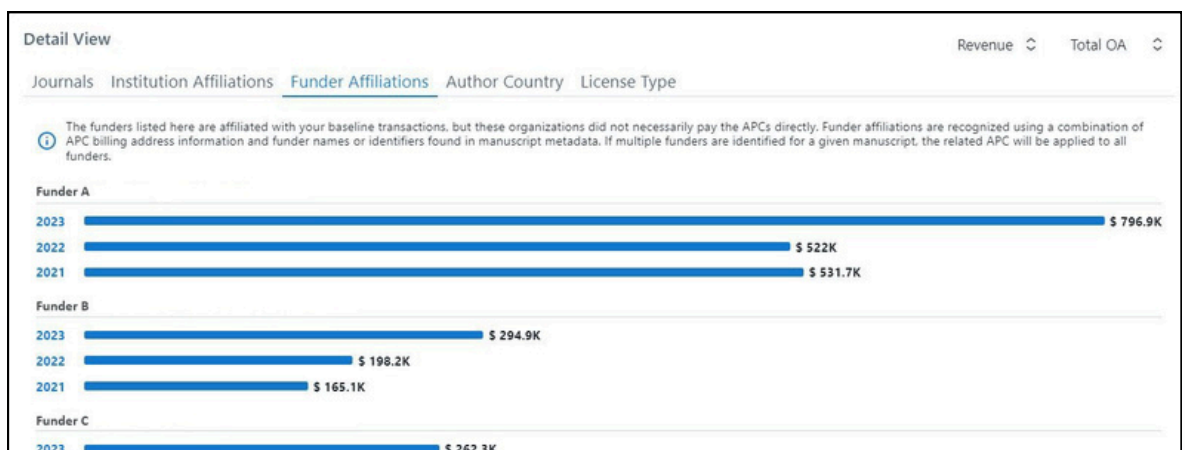
Detail View   Articles ⇕   Total OA ⇕

Journals   Institution Affiliations   Funder Affiliations   Author Country   License Type

ⓘ The journals listed here are affiliated with your baseline transactions, as per the Reference Data filters applied. Revenue displayed is a sum of all the Eligible Charges you've selected.

Journal 30

2023	12
2022	16
2021	15

Journal 77

2023	8
2022	9
2021	12

Journal 14

2023	4
2022	3

③ How do I show funders research that their grantees produce, and easily assess how policy changes may impact my business?

As new OA policies are introduced, many publishers are looking to quickly understand the impact they could have on their OA business. To do this analysis, the publisher must have a full understanding of their historical OA relationship with funders. In addition, some publishers are exploring direct deals with funders and need the data to support those conversations in the same way that they do currently with their institutional customers.

How OA Intelligence Helps Answer This Question

OA Intelligence helps publishers identify the impact of funder relationships on their publication volume and revenue through enrichment technology. Just like the disambiguation process used to define institutional affiliations, OA Intelligence will also match as many papers as possible to research funding organizations, where applicable. Publishers can assess which funders are backing their publications most often, to understand the impact on a specific institutional agreement or consider a direct deal with that funding organization.

Detail View   Revenue ⇕   Total OA ⇕

Journals   Institution Affiliations   **Funder Affiliations**   Author Country   License Type

ⓘ The funders listed here are affiliated with your baseline transactions, but these organizations did not necessarily pay the APCs directly. Funder affiliations are recognized using a combination of APC billing address information and funder names or identifiers found in manuscript metadata. If multiple funders are identified for a given manuscript, the related APC will be applied to all funders.

Funder A

2023	$ 796.9K
2022	$ 522K
2021	$ 531.7K

Funder B

2023	$ 294.9K
2022	$ 198.2K
2021	$ 165.1K

Funder C

2023	$ 262.3K

④ Are there any seasonal trends we should expect when we start to track performance, watch a cap, or assess our exposure in an unlimited publication deal?

Understanding customer trends can help identify spikes and lulls in publishing activity, which can inform internal forecasting and directly influence agreement offers. Measuring seasonal trends requires accurate data and sophisticated modeling processes, which can be time-consuming for publishers with many institutional agreements.

How OA Intelligence Helps Answer This Question

Through seasonality trend information in OA Intelligence, publishers can understand exactly what to expect throughout the year, or agreement term, with their customer. For example, without data at their fingertips, the publisher team might notice a big influx of articles at the top of the year and worry that the customer is drawing down against their article cap too quickly and the agreement may need to be adjusted. With OA Intelligence's data visualizations, insights can be found in trend data that highlight how an institution publishes research seasonally and identify quickly if a problem needs to be addressed. Agreement performance tracking is key for informed business forecasting and renewal strategy.
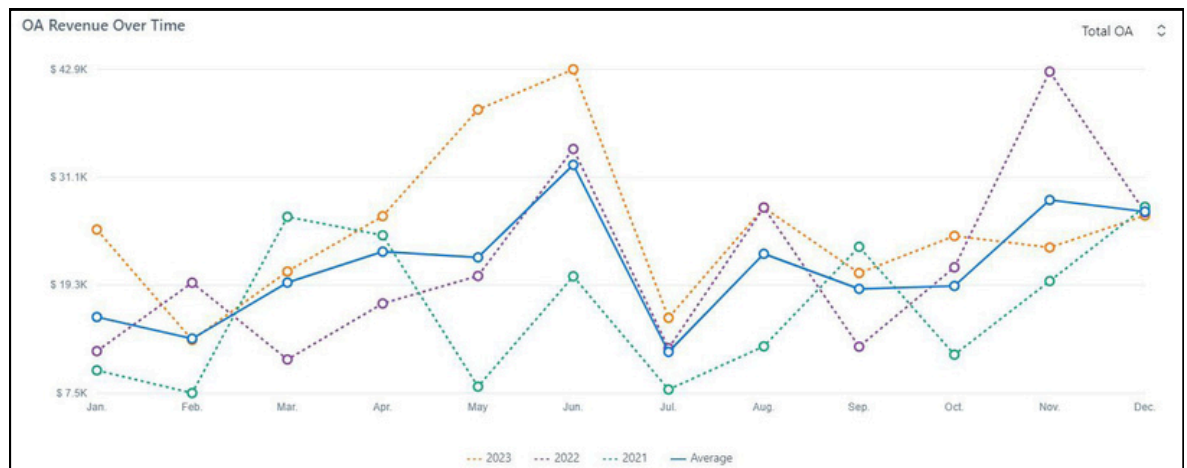
⑤ If we change our expectations for the future — such as increasing publication output or adjusting our list APC price — how does that impact the publication cap and spending estimates we propose to customers?

Though historical data is a useful baseline for proposing a new deal or renewal, sales teams know that the future may look different, and that scenario planning is key as publishing programs change and evolve. Sales teams must propose offers that align with the emerging strategic priorities of the business. If expectations change, the process of modeling out new offers based on these new realities can be an arduous task as it involves lengthy, error-prone data analysis efforts with limited tooling.

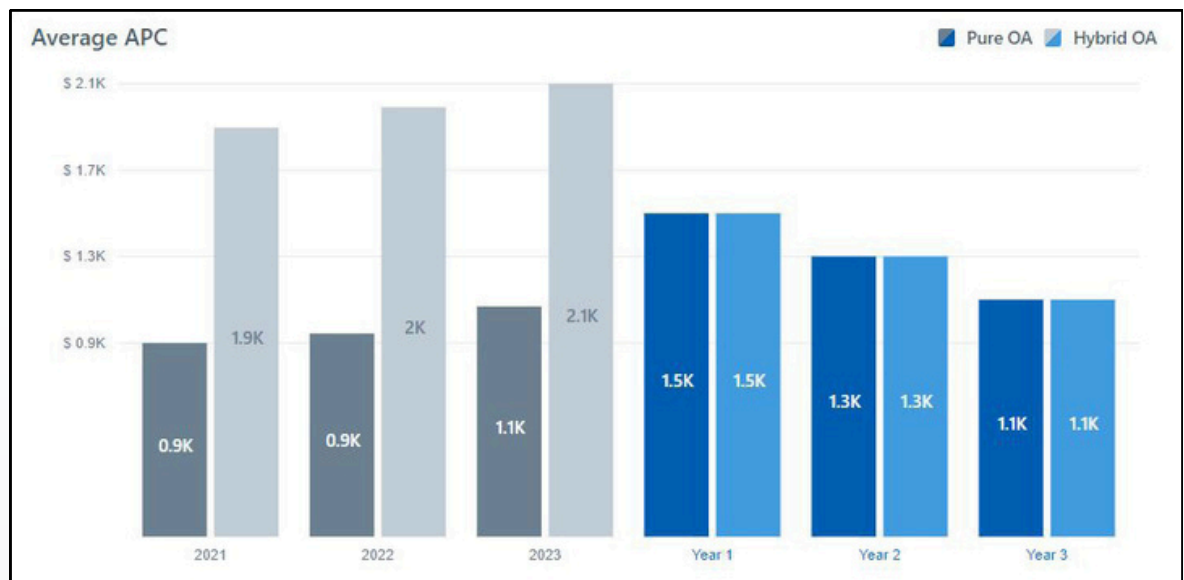### How OA Intelligence Helps Answer This Question

OA Intelligence's data modeling capabilities provide publishers with the ability to set different modeling parameters including publication growth by year, expected average APC and discounts, and more. Using automated modeling technology allows publishers to model "what-if?" scenarios for agile experimentation and innovation without hours of data analysis—and to craft agreement offers that make sense for all stakeholders. This can result in accelerating the time to market for publisher deals. Excel may get teams partway there, but it is not conducive to large datasets, hindering the ability to scale over time.

⑥ **What article, journal, and APC data should I share with the institution, consortium, or funder, to provide transparency about the basis for our proposal?**

Building trust and transparency with stakeholders is the key to moving successfully forward with OA deals. Data availability is crucial to this transparency, and institutions want to see the relevant data for each offer including all historical articles being considered to inform the negotiation.

How OA Intelligence Helps Answer This Question

Publishers using OA Intelligence provide consistent, data-based proposals to their customers. An independent, transparent modeling tool, OA Intelligence provides the ability to download the dataset used to build the offer so that it can be shared directly with the customer during sales negotiations. It also allows for the sharing of dynamic data visualizations that provide a year-over-year overview of both historical data and projected future years to see a complete view of the customer relationship over time, real and projected.

Average APC   Pure OA · Hybrid OA

	$ 2.1K	$ 1.7K	$ 1.3K	$ 0.9K	

- 2021: 0.9K / 1.9K
- 2022: 0.9K / 2K
- 2023: 1.1K / 2.1K
- Year 1: 1.5K / 1.5K
- Year 2: 1.3K / 1.3K
- Year 3: 1.1K / 1.1K

Learn more

Contact CCC to request a demo and learn how OA Intelligence can help your organization optimize and scale your OA agreement program.

✉ solutions@copyright.com

🌐 copyright.com/OAI

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