FREEMIUM OPEN ACCESS

THE OECD MODEL

Presentation at CALIS/DRAA
May 2015

OECD
BETTER POLICIES FOR BETTER LIVES

About the OECD

Mission:

- to promote policies that will improve the economic and social well-being of people around the world;
- provide a forum in which governments can work together to share experiences and seek solutions to common problems.
- measure, analyse, compare data, and set standards to predict future trends on a wide range of things.
- recommend policies designed to make the lives of ordinary people better.

OECD researches various area

Agriculture and fisheries
Bribery and corruption
Chemical safety and biosafety
Competition
Corporate governance
Development
Economy
Education
Employment
Environment
Finance
Green growth and sustainable development
Health
Industry and entrepreneurship
Innovation
Insurance and pensions
International migration
Internet
Investment
Public governance
Regional, rural and urban development
Regulatory reform
Science and technology
Social and welfare issues
Tax
Trade

Current OECD initiated topics

- PISA:
  - Evaluate education systems worldwide by testing the skills and knowledge of 15-year-old students
- Base Erosion and Profit Shifting:
  - G20 initiated project to understand the extent of large MNCs avoiding tax and to address the issue
- Inequality and the Middle Income Trap:
  - Fragmentation of Society, the Rich getting Richer, the Poor receives help, but the Middle Income faces increasing stress to maintain and improve their lifestyles

About OECD iLibrary

- OECD iLibrary:
  - Repository for all OECD output across all Directorates
  - Increase usage for OECD content via increased visability and improved usability

- •9 670 ebook titles
- •39 200 chapters
- •85 400 tables and graphs
- •4 000 articles
- •4 000 multilingual summaries
- •4 360 working papers
- •3 640 key tables
- •5 billion data points across 42 databases

Directives and Directions

Council

Oversight and
Strategic Direction

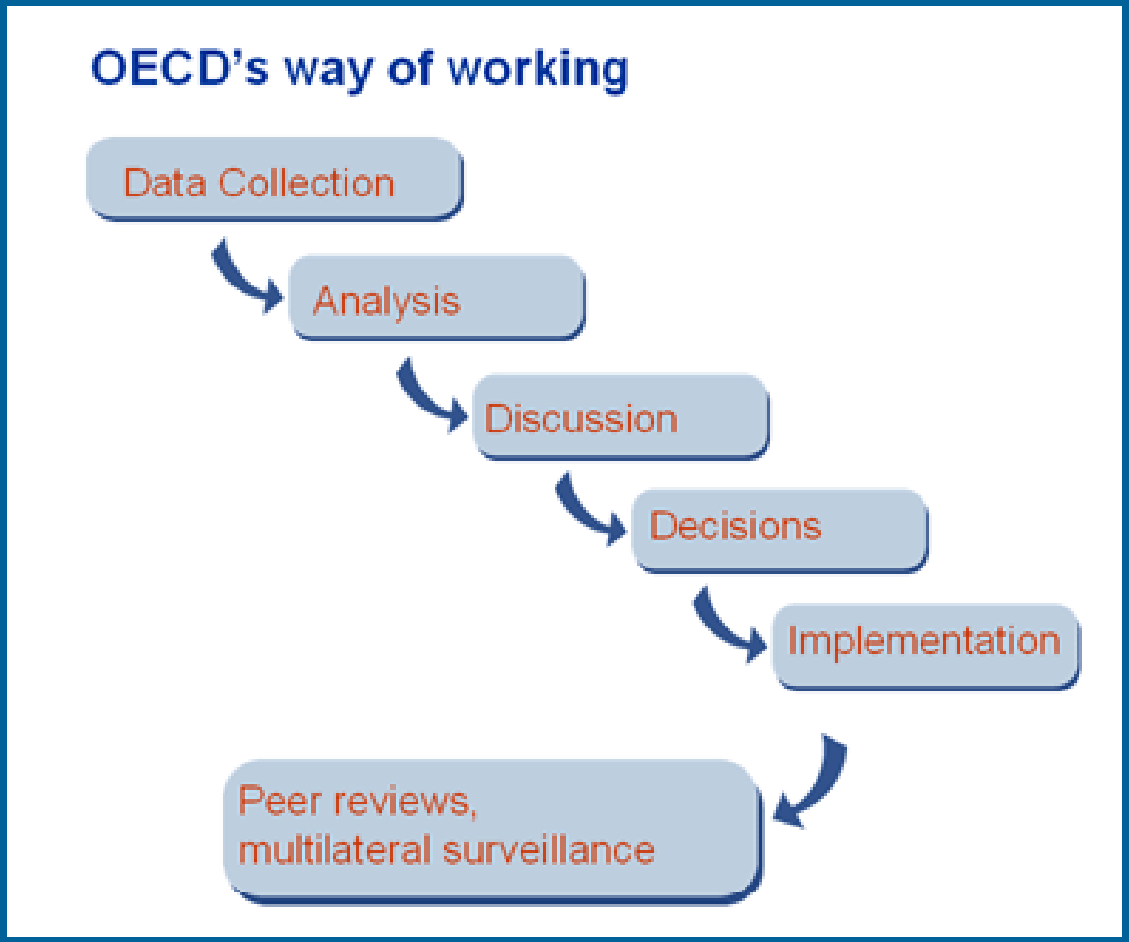
Committees

Discussion, Monitoring
and
Peer Review

Secretariat

Research, Analysis
and Policy
Recommendations

Methodology



Peer review

- Examination of country policies and practices by **experts** from other countries

- Effective tool for policy **improvement** thanks to:
  - Peer **pressure**
  - Common methodology and **criteria** to assess performance for all countries
  - Systematic **monitoring** mechanism
  - Peer learning and **capacity building**

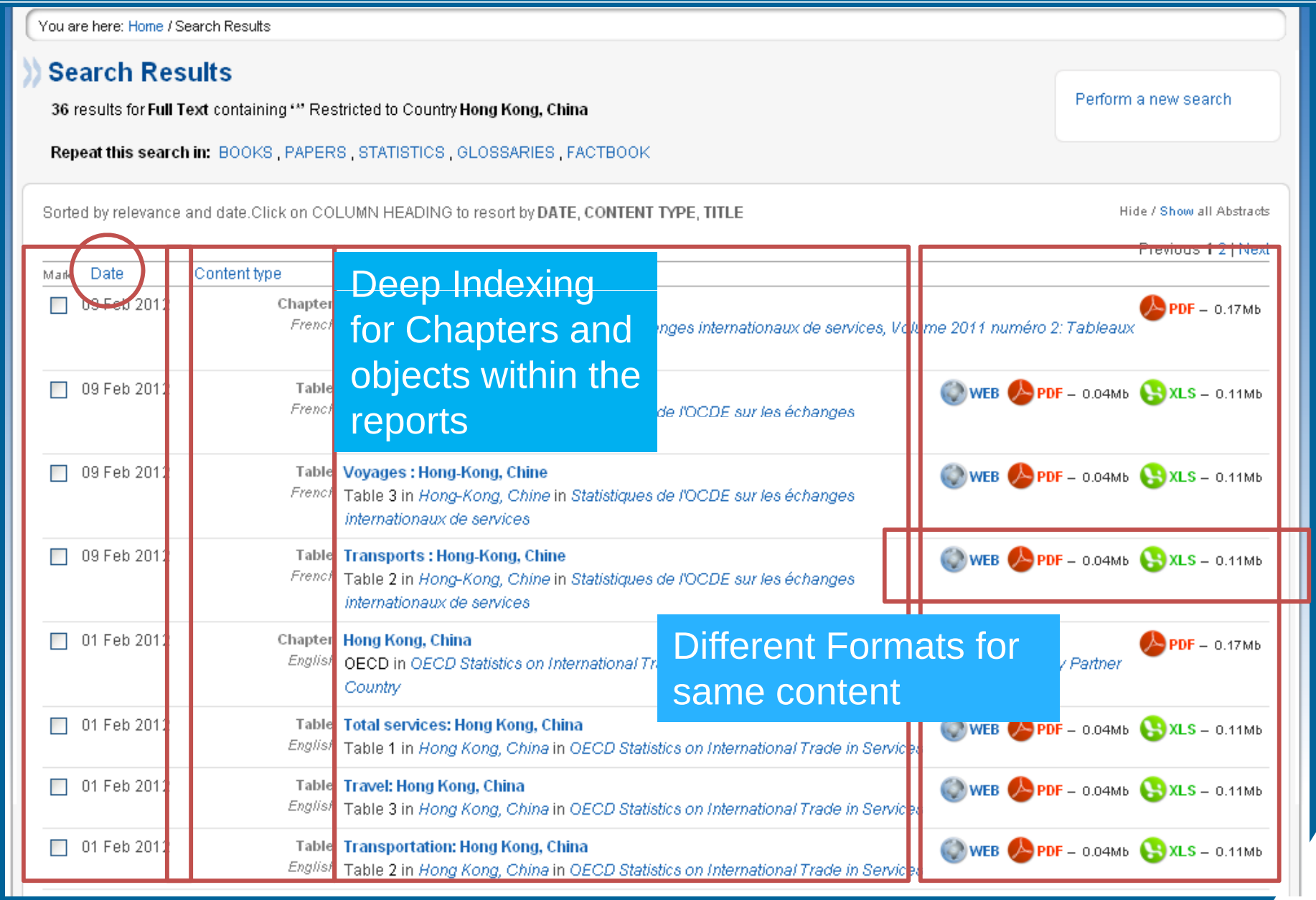
Reliability of the OECD Data

- All of the OECD's data are submitted from the governments of OECD member and non-member countries.
- In order to make them internationally comparable, the OECD sets up the international standards for collecting statistics cooperating with the United Nations and Eurostat. (ex. Standard International Trade Classification (SITC), International Standard Industrial Classification of All Economic Activities (ISIC))
- The governments collect statistical data in their own countries by such standards, and submit to the OECD.

Challenges: Discoverability and Usability

- Create **publishing metadata** at more **granular** level so that smaller and more relevant pieces of information can easily be searched and **found**, whether data or analysis.
- Create **statistical metadata** so that the numbers are never delivered without the textual environment making them **understandable** and **usable**.
- Link, as much as possible, **analytical** content to the **statistical evidence** supporting it.
- Deliver the content in the most **user-friendly** environment (citation tools, links to the context of each object, multiple formats).
- Adapt content to the different platforms and reader environments.
- Increase content index coverage

Country search



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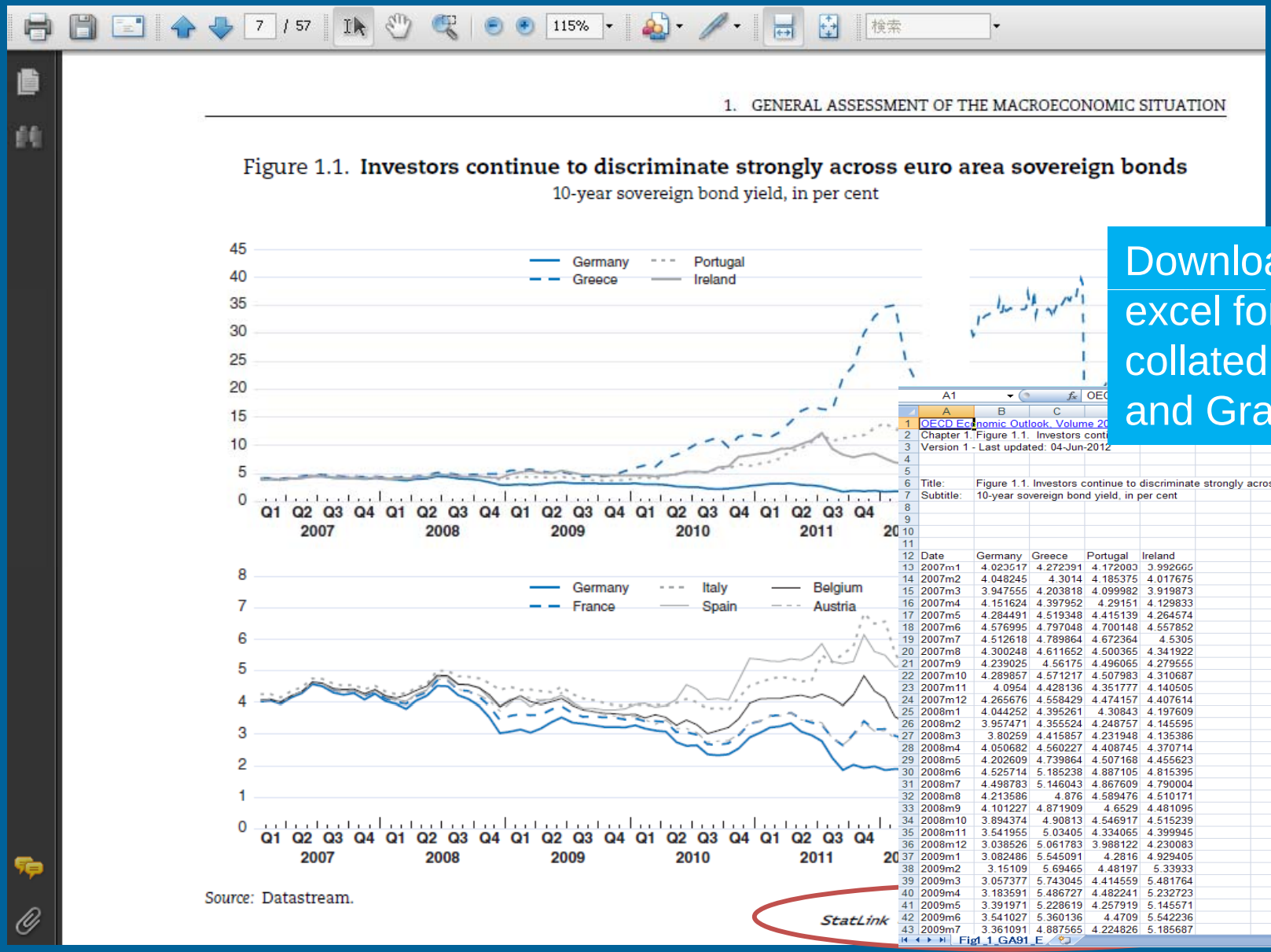

1. GENERAL ASSESSMENT OF THE MACROECONOMIC SITUATION

Figure 1.1. **Investors continue to discriminate strongly across euro area sovereign bonds**

10-year sovereign bond yield, in per cent

Source: Datastream.

Downloadable excel for OECD collated Tables and Graphs

	A	B	C	D	E
1	OECD Economic Outlook, Volume 20				
2	Chapter 1. Figure 1.1. Investors cont				
3	Version 1 - Last updated: 04-Jun-2012				
4					
5					
6	Title:	Figure 1.1. Investors continue to discriminate strongly across euro area sovereign bonds			
7	Subtitle:	10-year sovereign bond yield, in per cent			
8					
9					
10					
11					
12	Date	Germany	Greece	Portugal	Ireland
13	2007m1	4.023517	4.272391	4.172003	3.992665
14	2007m2	4.048245	4.3014	4.185375	4.017675
15	2007m3	3.947555	4.203818	4.099982	3.919873
16	2007m4	4.151624	4.397952	4.29151	4.129833
17	2007m5	4.284491	4.519348	4.415139	4.264574
18	2007m6	4.576995	4.797048	4.700148	4.557852
19	2007m7	4.512618	4.789864	4.672364	4.5305
20	2007m8	4.300248	4.611652	4.500365	4.341922
21	2007m9	4.239025	4.56175	4.496065	4.279555
22	2007m10	4.289857	4.571217	4.507983	4.310687
23	2007m11	4.0954	4.428136	4.351777	4.140505
24	2007m12	4.265676	4.558429	4.474157	4.407614
25	2008m1	4.044252	4.395261	4.30843	4.197609
26	2008m2	3.957471	4.355524	4.248757	4.145595
27	2008m3	3.80259	4.415857	4.231948	4.135386
28	2008m4	4.050682	4.560227	4.408745	4.370714
29	2008m5	4.202609	4.739864	4.507168	4.455623
30	2008m6	4.525714	5.185238	4.887105	4.815395
31	2008m7	4.498783	5.146043	4.867609	4.790004
32	2008m8	4.213586	4.876	4.589476	4.510171
33	2008m9	4.101227	4.871909	4.6529	4.481095
34	2008m10	3.894374	4.90813	4.546917	4.515239
35	2008m11	3.541955	5.03405	4.334065	4.399945
36	2008m12	3.038526	5.061783	3.988122	4.230083
37	2009m1	3.082486	5.545091	4.2816	4.929405
38	2009m2	3.15109	5.69465	4.48197	5.33933
39	2009m3	3.057377	5.743045	4.414559	5.481764
40	2009m4	3.183591	5.486727	4.482241	5.232723
41	2009m5	3.391971	5.228619	4.257919	5.145571
42	2009m6	3.541027	5.360136	4.4709	5.542236
43	2009m7	3.361091	4.887565	4.224826	5.185687

Fig1_1_GA91_E

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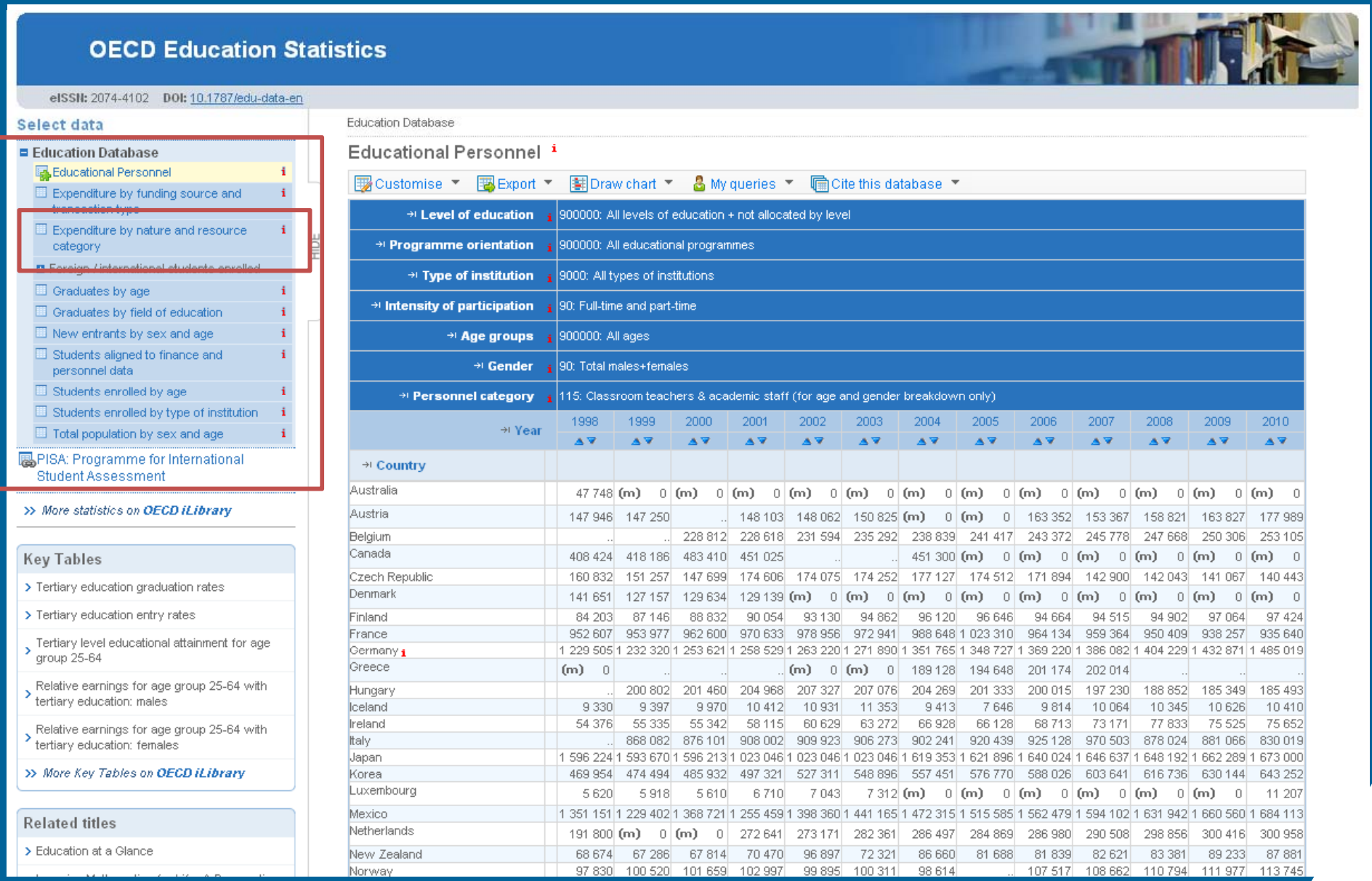
Interactive Database - Ex. OECD Education Statistics



OECD Education Statistics

eISSN: 2074-4102 DOI: 10.1787/edu-data-en

Select data

- Education Database
  - Educational Personnel
  - Expenditure by funding source and transaction type
  - Expenditure by nature and resource category
  - Foreign / international students enrolled
  - Graduates by age
  - Graduates by field of education
  - New entrants by sex and age
  - Students aligned to finance and personnel data
  - Students enrolled by age
  - Students enrolled by type of institution
  - Total population by sex and age
- PISA: Programme for International Student Assessment

HIDE

» *More statistics on OECD iLibrary*

Key Tables

- Tertiary education graduation rates
- Tertiary education entry rates
- Tertiary level educational attainment for age group 25-64
- Relative earnings for age group 25-64 with tertiary education: males
- Relative earnings for age group 25-64 with tertiary education: females

» *More Key Tables on OECD iLibrary*

Related titles

- Education at a Glance

Education Database

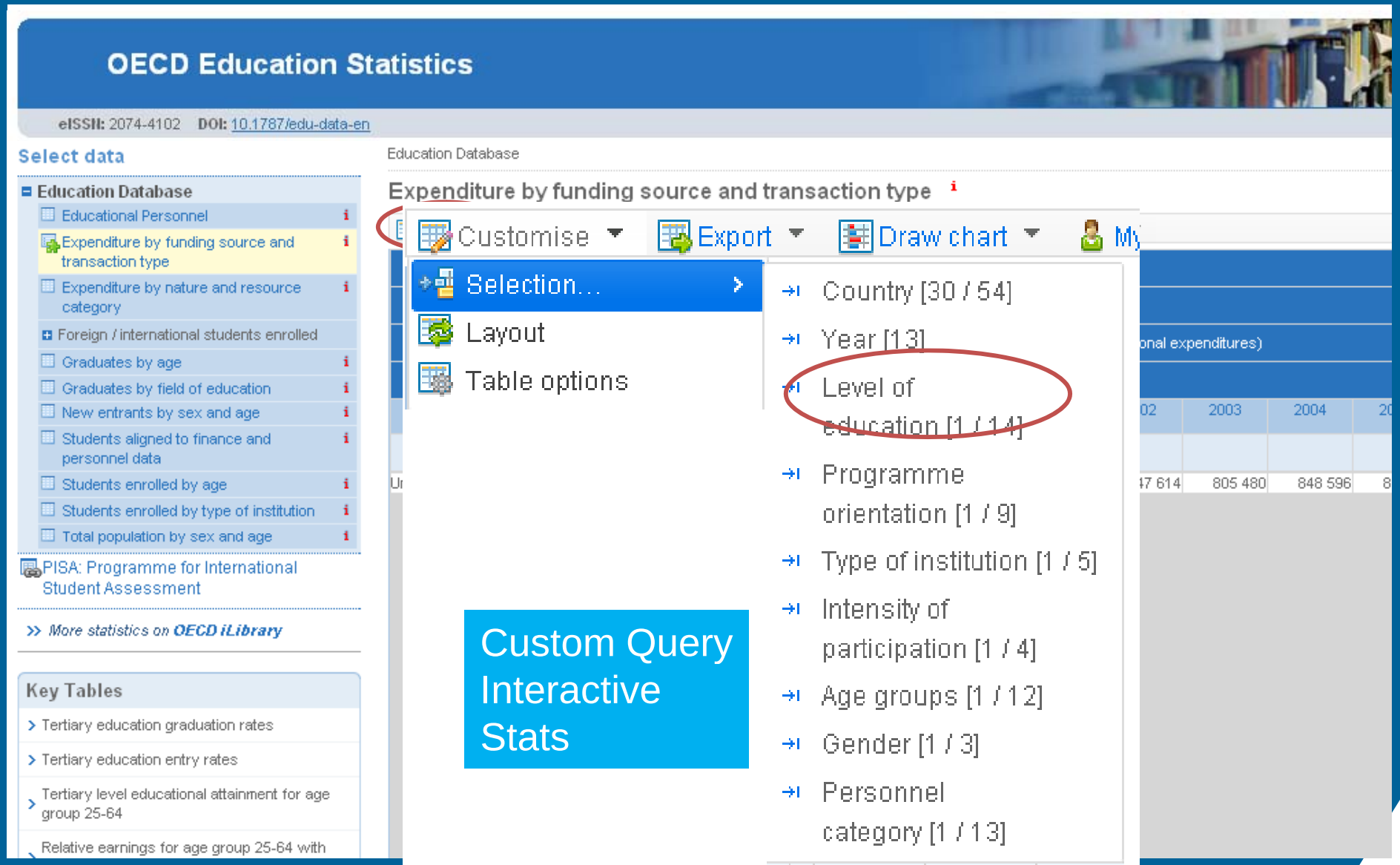
Educational Personnel

Customise | Export | Draw chart | My queries | Cite this database

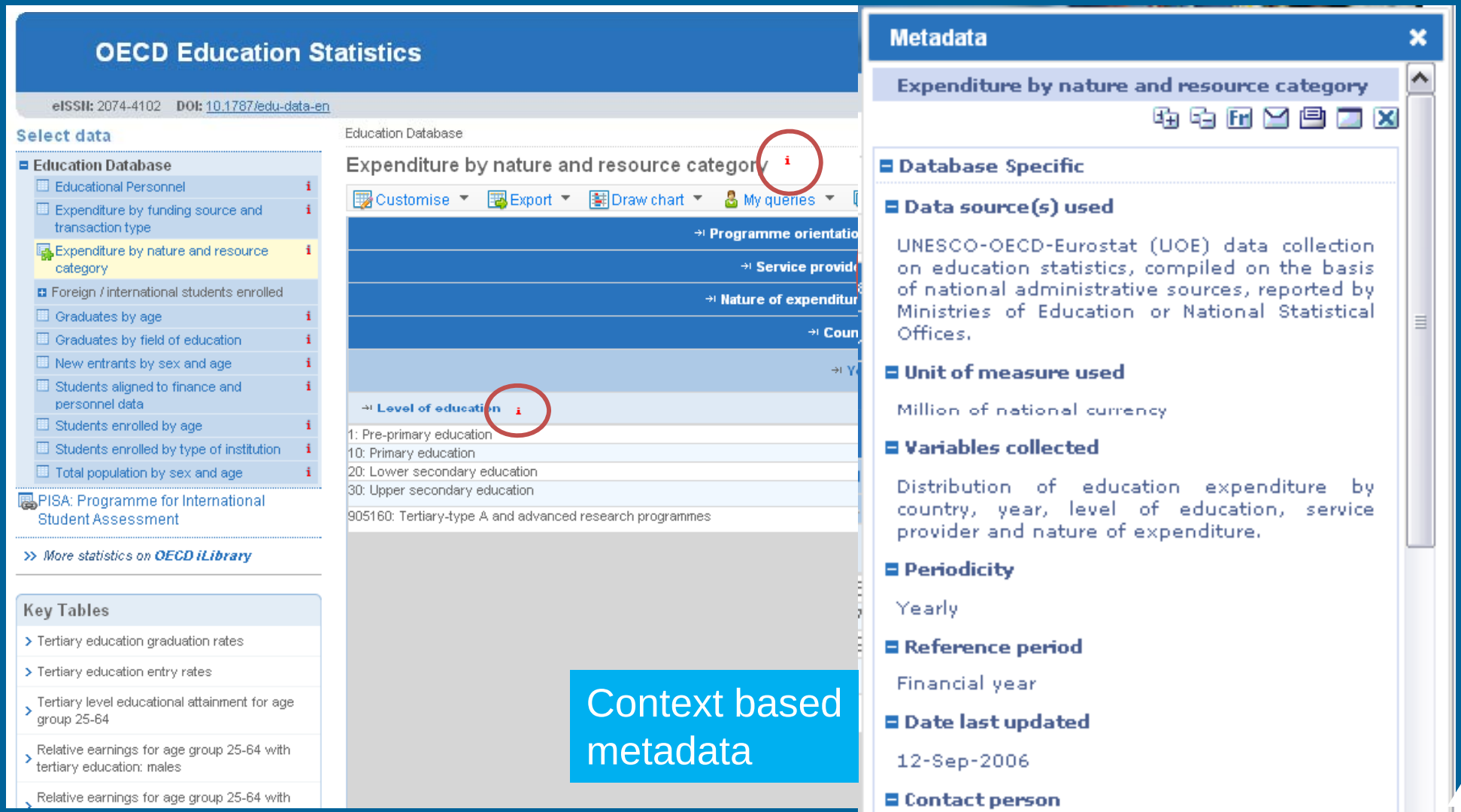
Level of education	900000: All levels of education + not allocated by level
Programme orientation	900000: All educational programmes
Type of institution	9000: All types of institutions
Intensity of participation	90: Full-time and part-time
Age groups	900000: All ages
Gender	90: Total males+females
Personnel category	115: Classroom teachers & academic staff (for age and gender breakdown only)

Country \ Year	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010
Australia	47 748	(m) 0	(m) 0	(m) 0	(m) 0	(m) 0	(m) 0	(m) 0	(m) 0	(m) 0	(m) 0	(m) 0	(m) 0
Austria	147 946	147 250	..	148 103	148 062	150 825	(m) 0	(m) 0	163 352	153 367	158 821	163 827	177 989
Belgium	..	..	228 812	228 618	231 594	235 292	238 839	241 417	243 372	245 778	247 668	250 306	253 105
Canada	408 424	418 186	483 410	451 025	..	..	451 300	(m) 0	(m) 0	(m) 0	(m) 0	(m) 0	(m) 0
Czech Republic	160 832	151 257	147 699	174 606	174 075	174 252	177 127	174 512	171 894	142 900	142 043	141 067	140 443
Denmark	141 651	127 157	129 634	129 139	(m) 0	(m) 0	(m) 0	(m) 0	(m) 0	(m) 0	(m) 0	(m) 0	(m) 0
Finland	84 203	87 146	88 832	90 054	93 130	94 862	96 120	96 646	94 664	94 515	94 902	97 064	97 424
France	952 607	953 977	962 600	970 633	978 956	972 941	988 648	1 023 310	964 134	959 364	950 409	938 257	935 640
Germany	1 229 505	1 232 320	1 253 621	1 258 529	1 263 220	1 271 890	1 351 765	1 348 727	1 369 220	1 386 082	1 404 229	1 432 871	1 485 019
Greece	(m) 0	..	..	..	(m) 0	(m) 0	189 128	194 648	201 174	202 014	..	..	..
Hungary	..	200 802	201 460	204 968	207 327	207 076	204 269	201 333	200 015	197 230	188 852	185 349	185 493
Iceland	9 330	9 397	9 970	10 412	10 931	11 353	9 413	7 646	9 814	10 064	10 345	10 626	10 410
Ireland	54 376	55 335	55 342	58 115	60 629	63 272	66 928	66 128	68 713	73 171	77 833	75 525	75 652
Italy	..	868 082	876 101	908 002	909 923	906 273	902 241	920 439	925 128	970 503	878 024	881 066	830 019
Japan	1 596 224	1 593 670	1 596 213	1 023 046	1 023 046	1 023 046	1 619 353	1 621 896	1 640 024	1 646 637	1 648 192	1 662 289	1 673 000
Korea	469 954	474 494	485 932	497 321	527 311	548 896	557 451	576 770	588 026	603 641	616 736	630 144	643 252
Luxembourg	5 620	5 918	5 610	6 710	7 043	7 312	(m) 0	(m) 0	(m) 0	(m) 0	(m) 0	(m) 0	11 207
Mexico	1 351 151	1 229 402	1 368 721	1 255 459	1 398 360	1 441 165	1 472 315	1 515 585	1 562 479	1 594 102	1 631 942	1 660 560	1 684 113
Netherlands	191 800	(m) 0	(m) 0	272 641	273 171	282 361	286 497	284 869	286 980	290 508	298 856	300 416	300 958
New Zealand	68 674	67 286	67 814	70 470	96 897	72 321	86 660	81 688	81 839	82 621	83 381	89 233	87 881
Norway	97 830	100 520	101 659	102 997	99 895	100 311	98 614	..	107 517	108 662	110 794	111 977	113 745

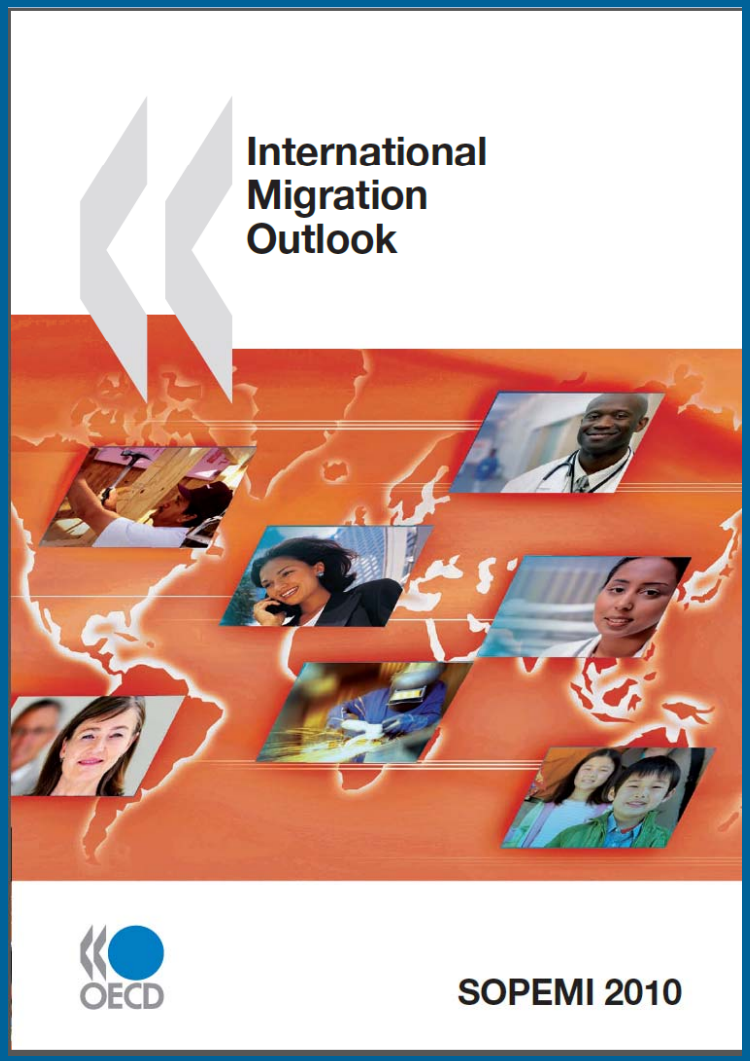
Customise selection



The table completed!



A Story about the birth of a book



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Committees & Directorates

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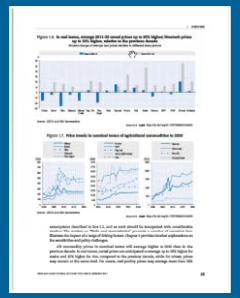

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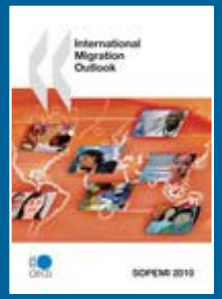

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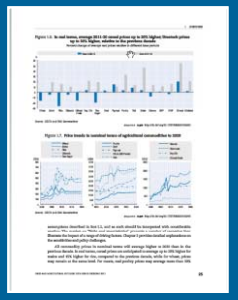

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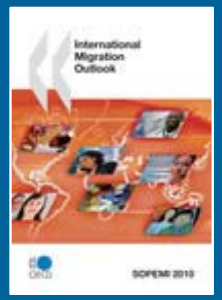

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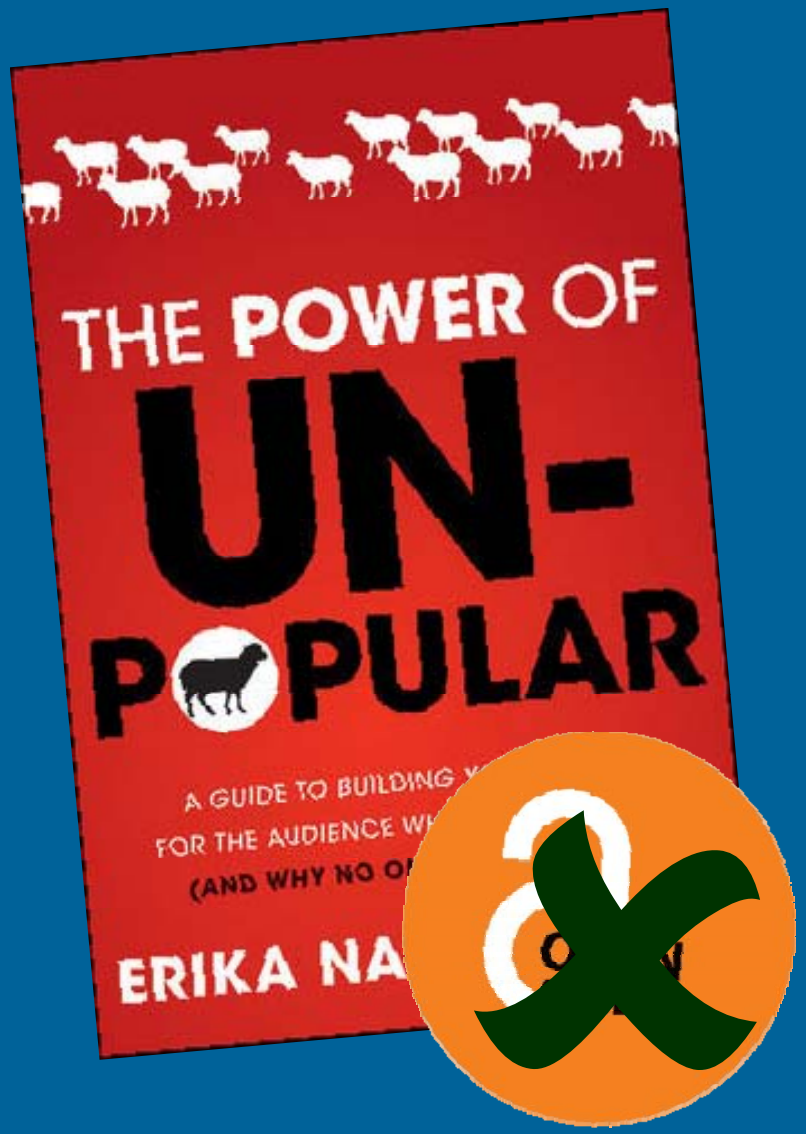
OECD iLibrary

Learning to let go . . .
or
How Freemium could be a fairer and more sustainable version of OA

OECD
BETTER POLICIES FOR BETTER LIVES

Most-read by STM publishers?



"Every successful brand in history is inherently unpopular with a specific demographic."

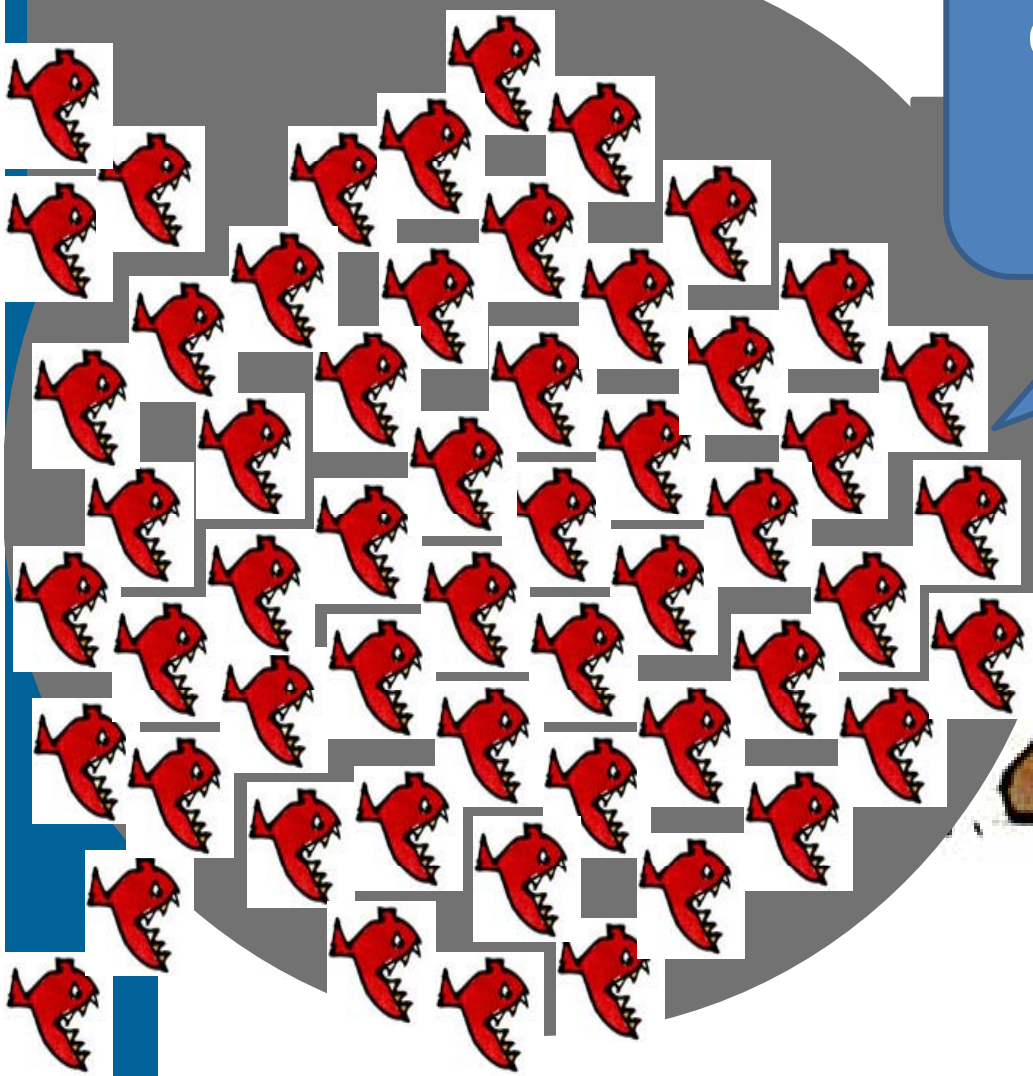
"Somewhere along the way, people felt they had to be popular in order to be successful, when in fact, the opposite is true."

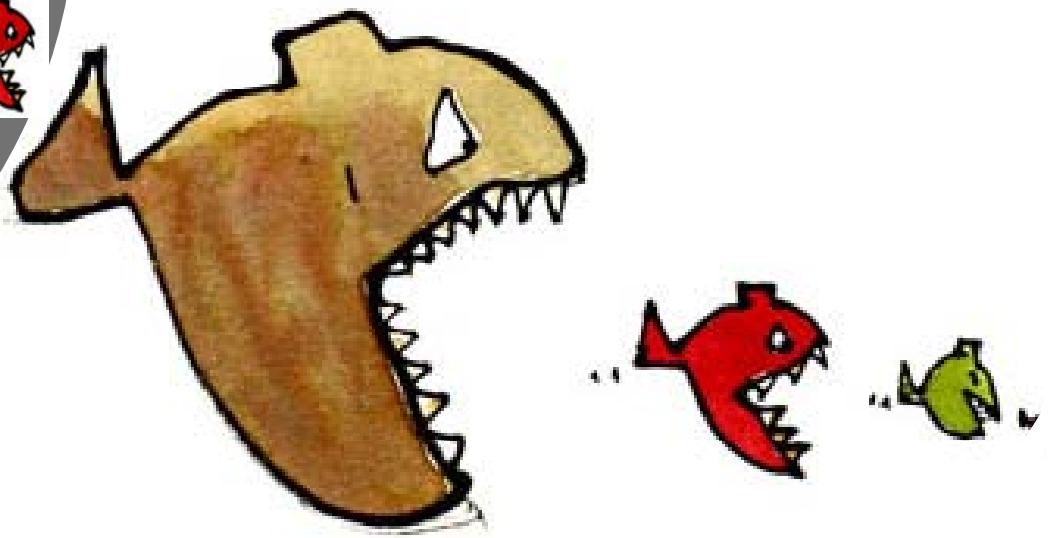
"The brands playing in the space you want to dominate have already figured out the inherent power of being unpopular."

(Published by Wiley)

Do we know our audience . . .?

"The audience which finds your content interesting and useful **is always larger** than you think."

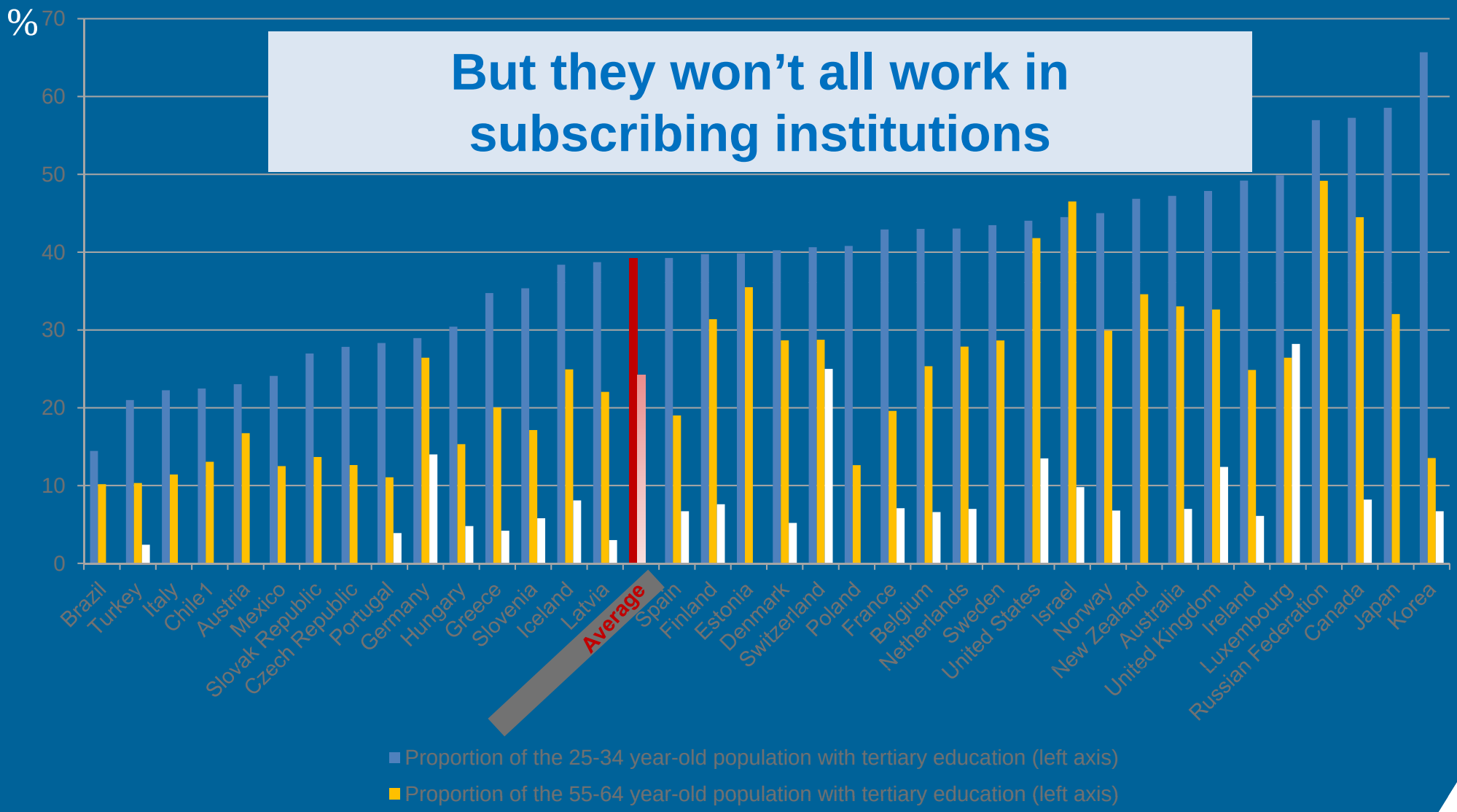




Practitioners, unaffiliated researchers, educated layman . . . .

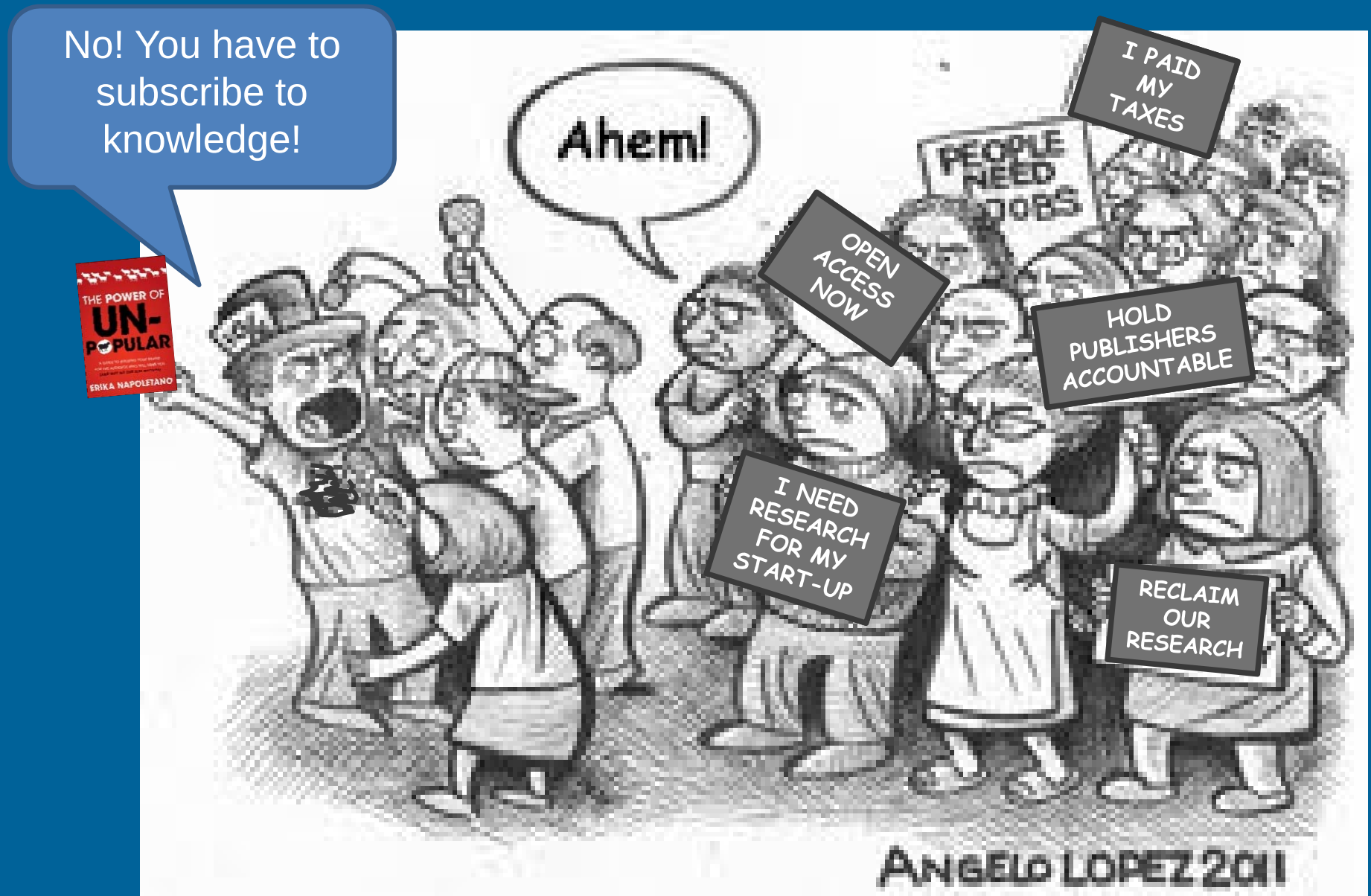
More graduates = more demand for scholarly publications

a



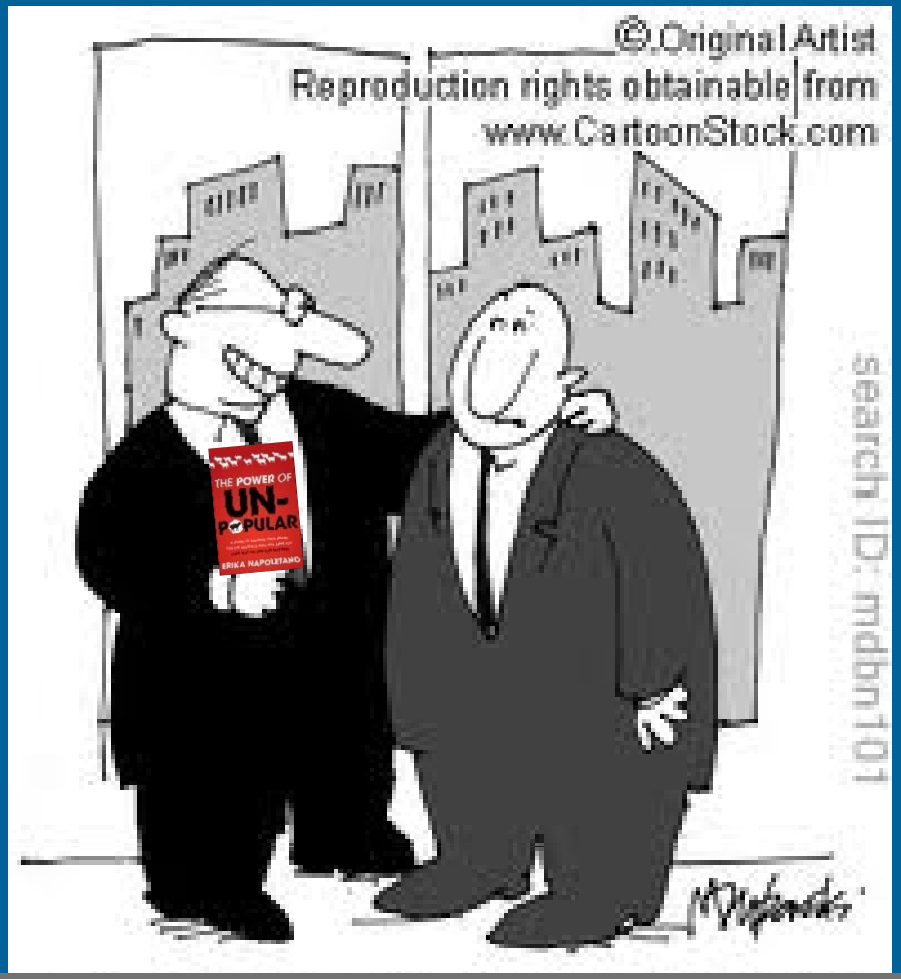
Source: OECD (2014),Graph A1.3. Percentage of younger and older tertiary-educated adults (2012): 25-34 and 55-64 year-olds, and percentage-point difference between these two groups, in *Education at a Glance 2014*, OECD Publishing. DOI: 10.1787/eag-2014-graph3-en

. . . so, no wonder they're calling for better access . . .



. . . and the policymakers and funders are listening . . . and acting . . .

. . . so publishers are reacting . . .



Don't worry, Dad, I'm going to turn this company around 360 degrees!

. . . by turning their attention to authors

(and their funders)

. . .at the risk of ignoring the needs of . . .

READERS

(and their institutions)

Practitioners, unaffiliated researchers, educated layman . . . .

Open Access – find the missing words

"If you make it open . . . they will come"

Open Access Mandates

"Thou shall deposit . . . and it will have impact"

Open Access business models summarised

Green

- Please post a version in a repository
- Sometime later will do
- I hope a lot of readers will benefit (although I have now given them a horrible user journey and taken away their economic 'voice')
- I don't want to think about costs (or the impact it may have on journal or book publishing on which my reputation and career depends)
- But my conscience is clear

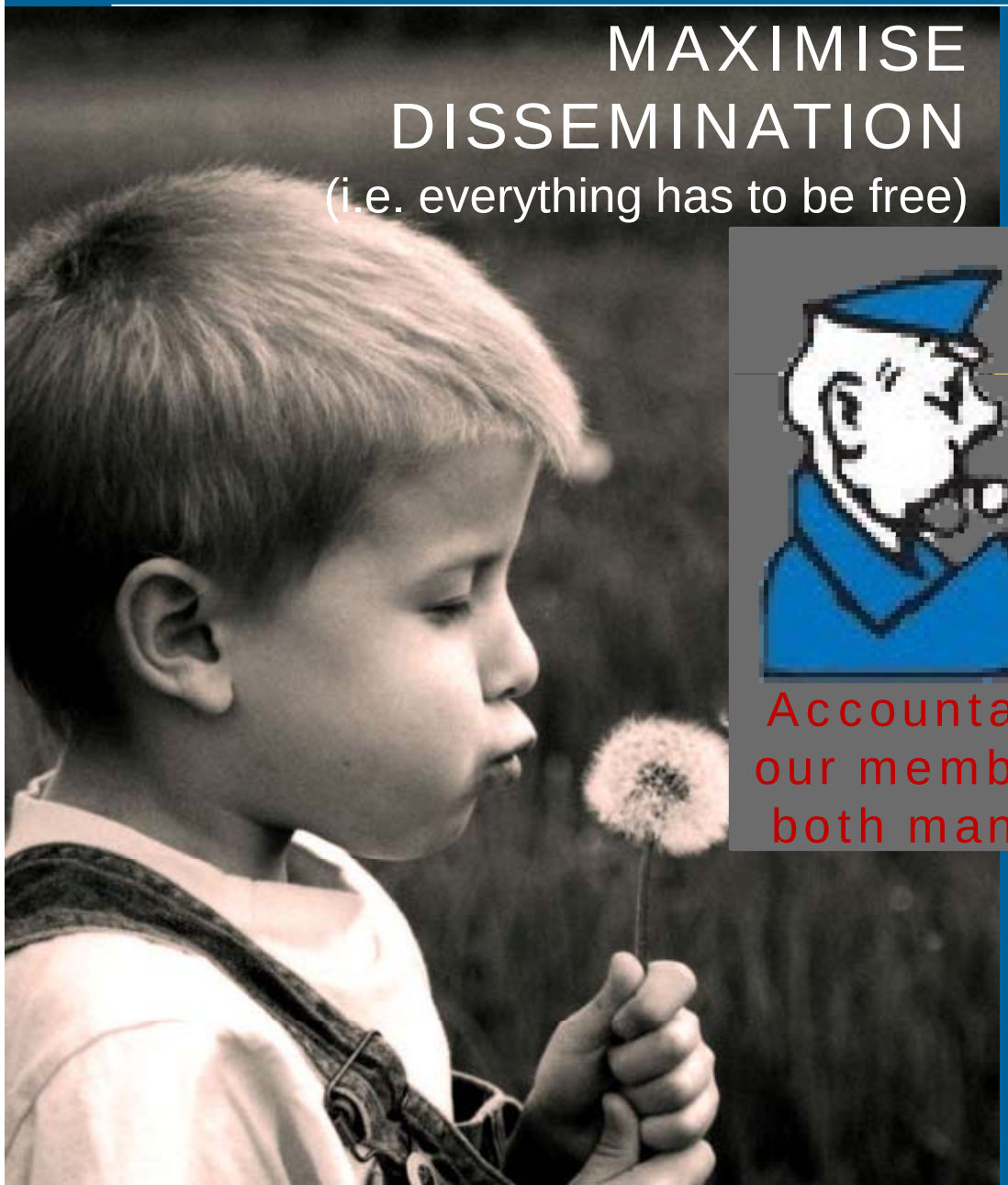
Gold

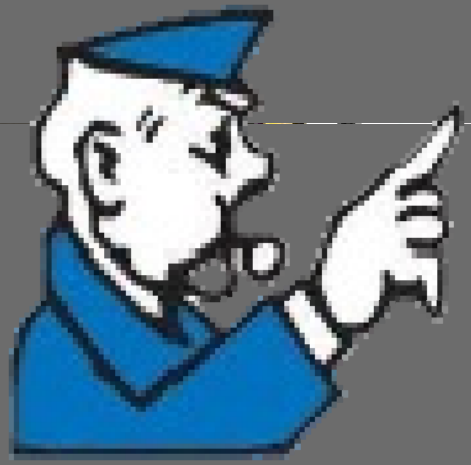
- I'll foot the publishing bill
- I hope a lot of readers will benefit (although I have now taken away their economic 'voice')
- I don't want to think about future costs
- But my conscience is clear

And 20 years on from Budapest, <50% of journal articles and <5% of scholarly books are free to read.
Will Green and Gold ever deliver 100% OA?

OECD Publishing's mandate

MAXIMISE DISSEMINATION
(i.e. everything has to be free)

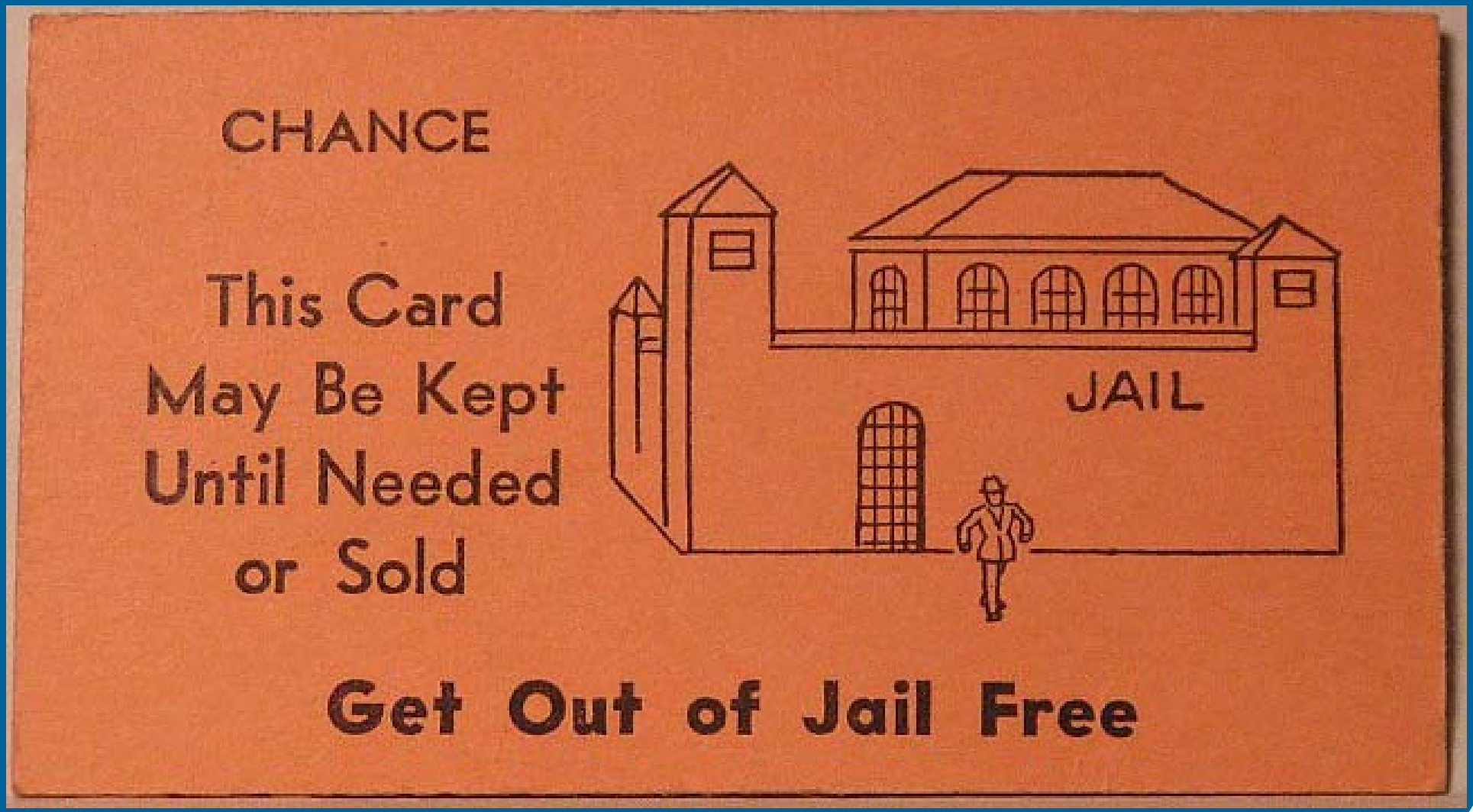




Accountable to our members on both mandates

FULL COST RECOVERY
(i.e. everything needs to be priced)

So, how do we stay out of debtors' jail?



Freemium ?

freemium

NOUN

A business model, especially on the Internet, whereby **basic services are provided free of charge** while **more advanced features must be paid for**.

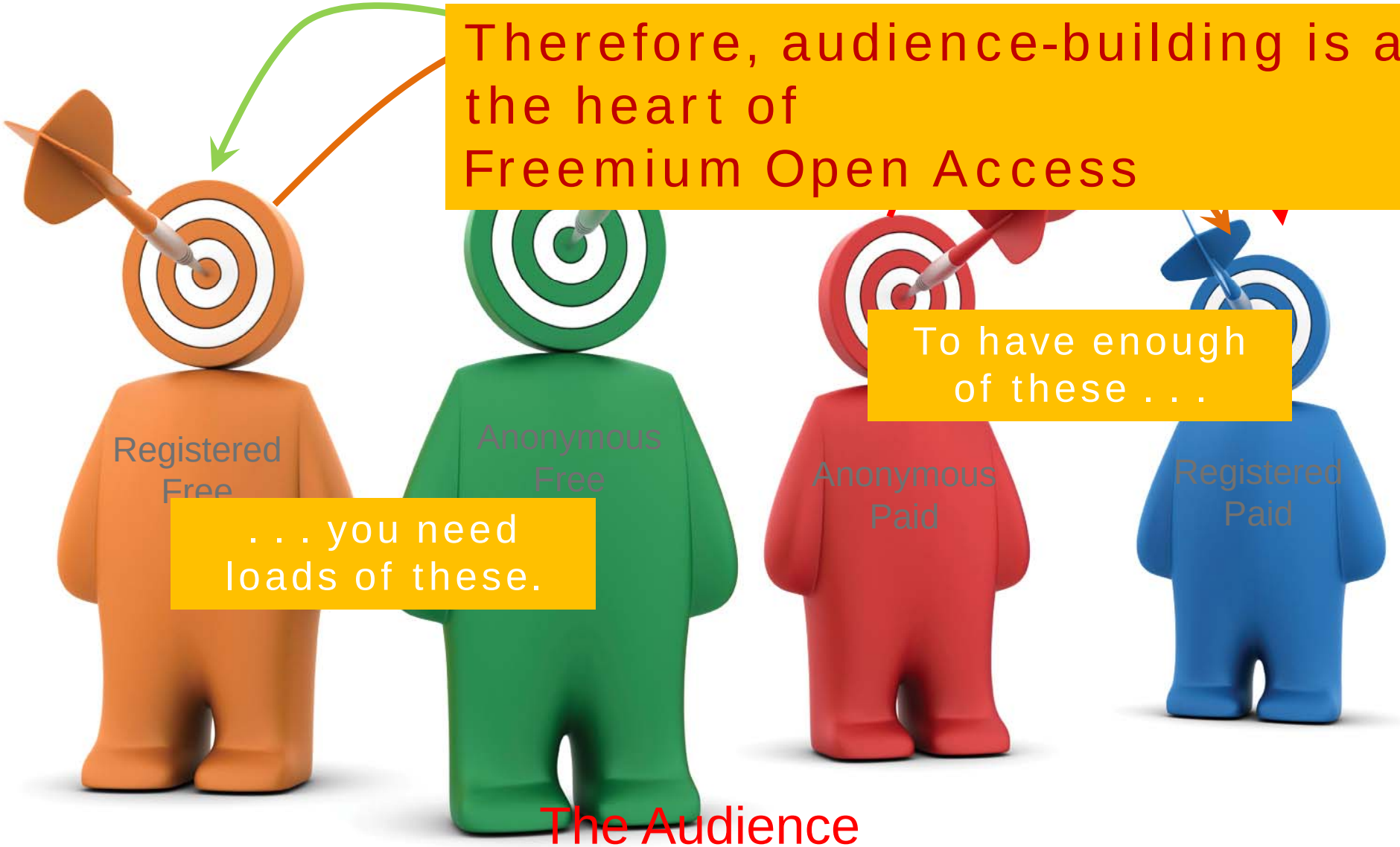
Origin
early 21st century: blend of free and premium.

Oxford Dictionaries
Language matters

http://www.oxforddictionaries.com/defi

. . . and a common digital media business model

Freemium is all about audience building and offering the option of moving up a value path

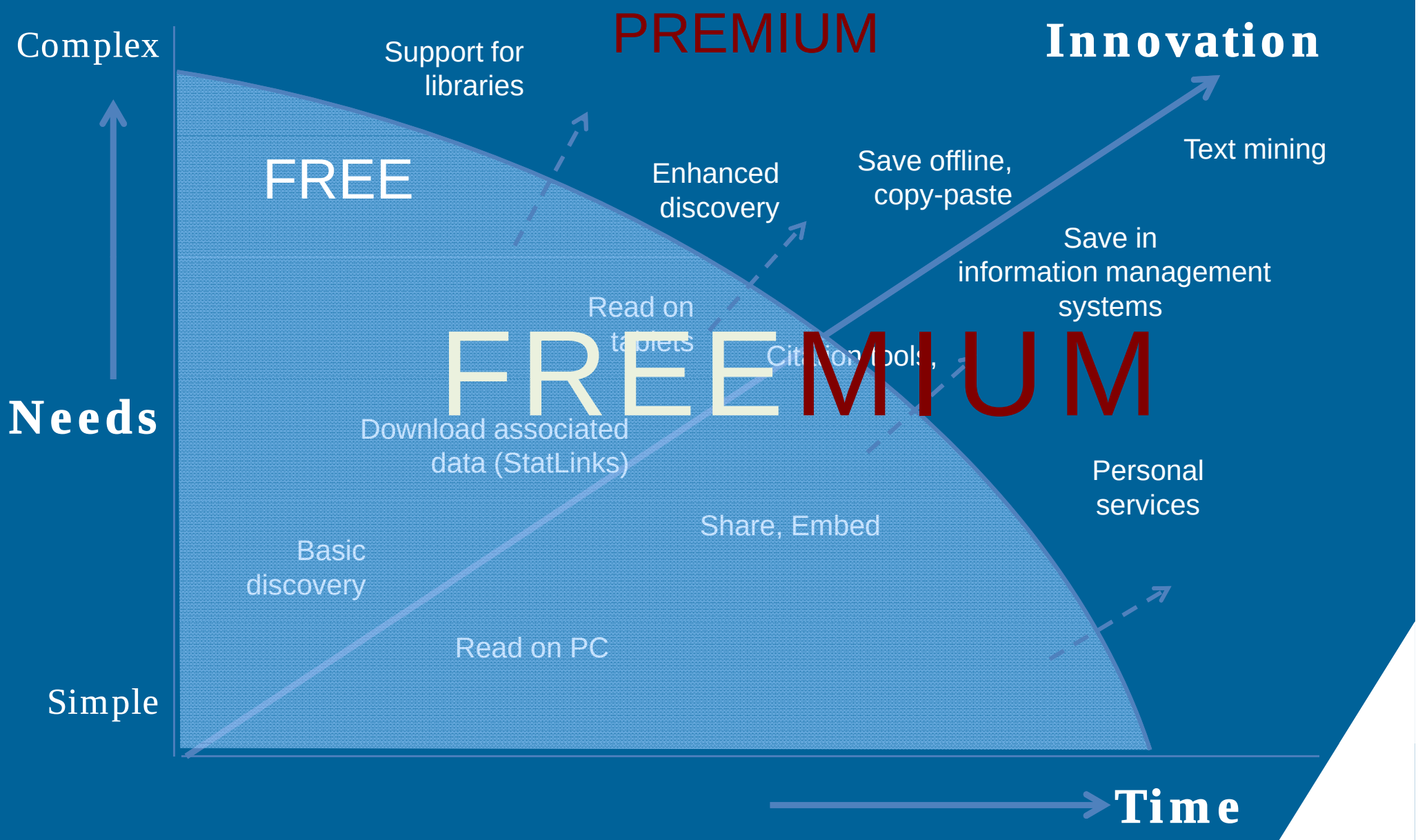


Freemium – it's about the value proposition

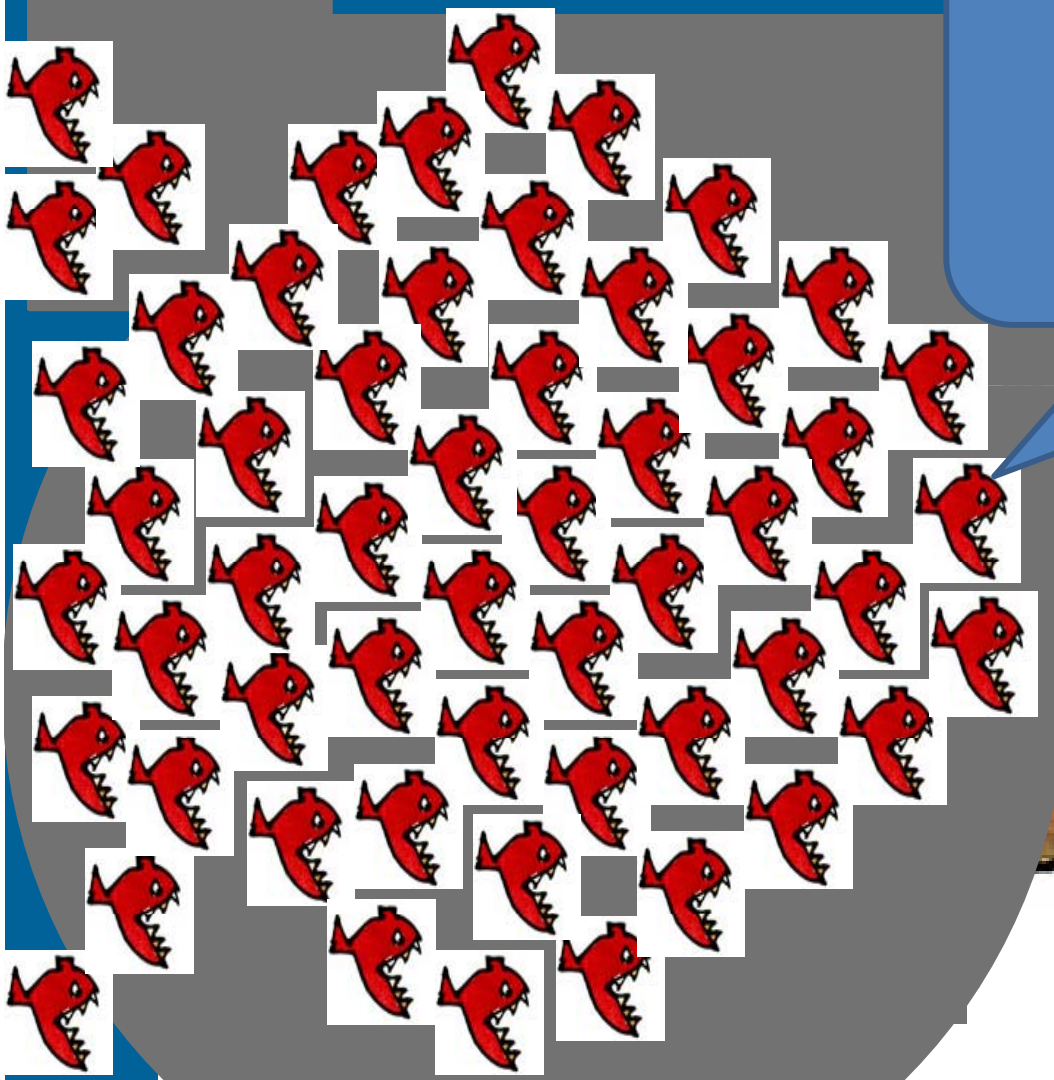
A business model, especially on the Internet, whereby **basic services are provided free of charge** while **more advanced features must be paid for**.

	Free Anonymous	Free Registered	Paid Anonymous	Paid Registered
Discover and Read all content	✓	✓	✓	✓
Share, embed content	✓	✓	✓	✓
Personal services (e.g. alerts)		✓		✓
Download, cut/paste content (PDF, ePub etc)			✓	✓
Librarian services				✓

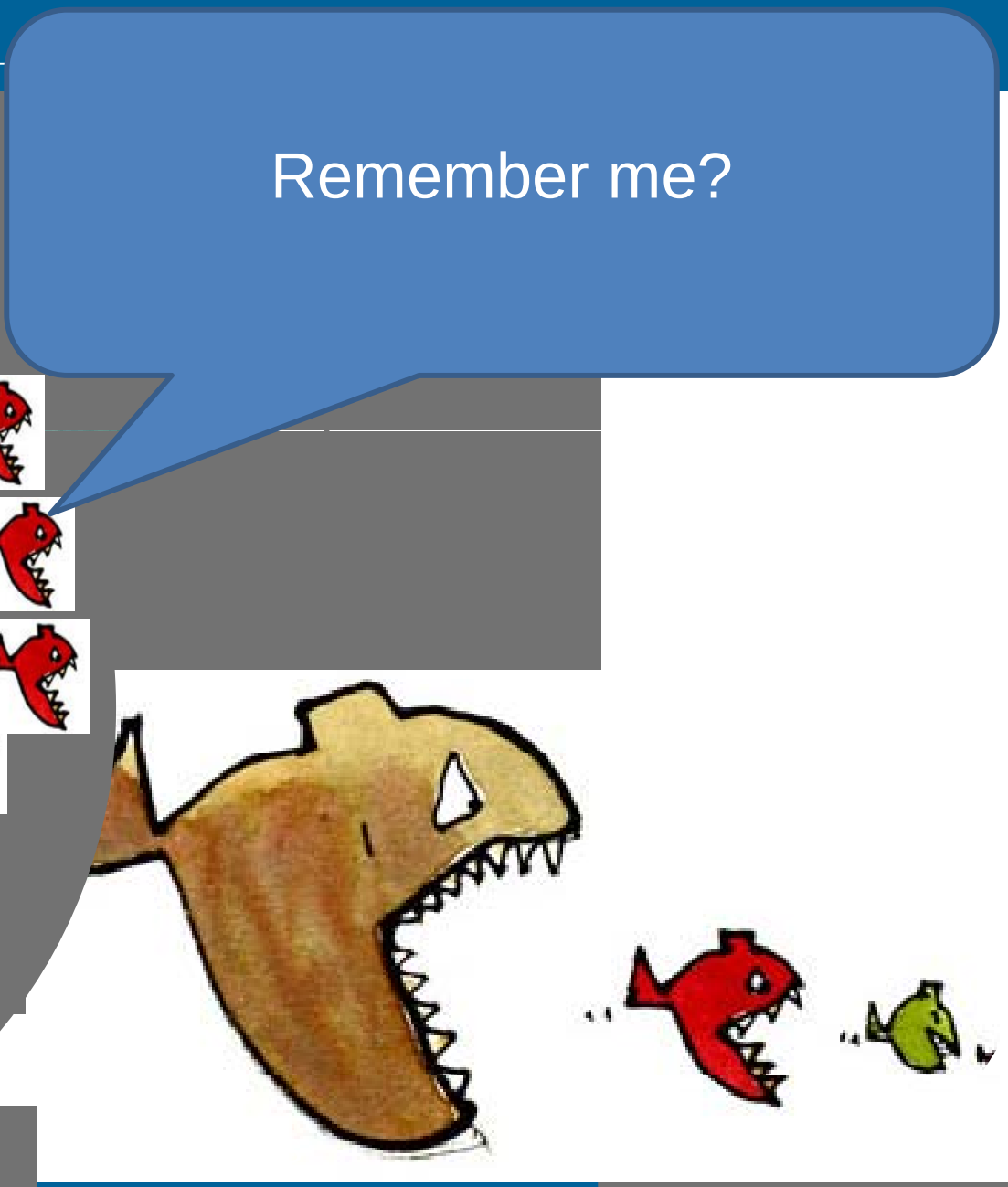
Freemium must innovate and evolve



But my audience is too small!



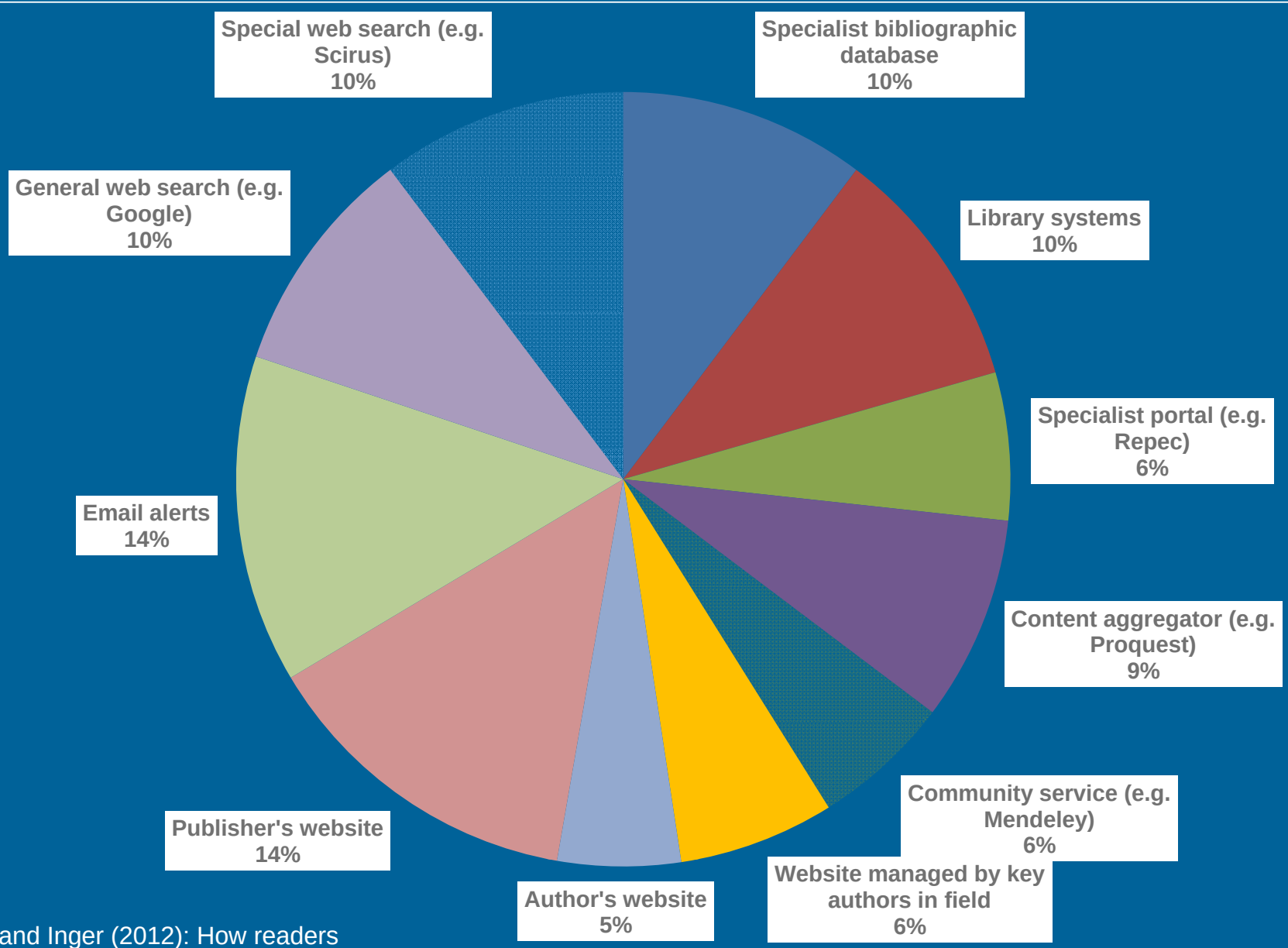
Practitioners, unaffiliated researchers, educated layman . . . .



Audience building – how?

Sour http://www.ediblegeography.com/the-spatial-distribution-of-americans-in-relationship-to-starbucks/

By doing all the usual **discovery** stuff . . .



Source: Gardner and Inger (2012): How readers discover content in scholarly journals

. . . and using many **delivery** channels

For professionals . . .

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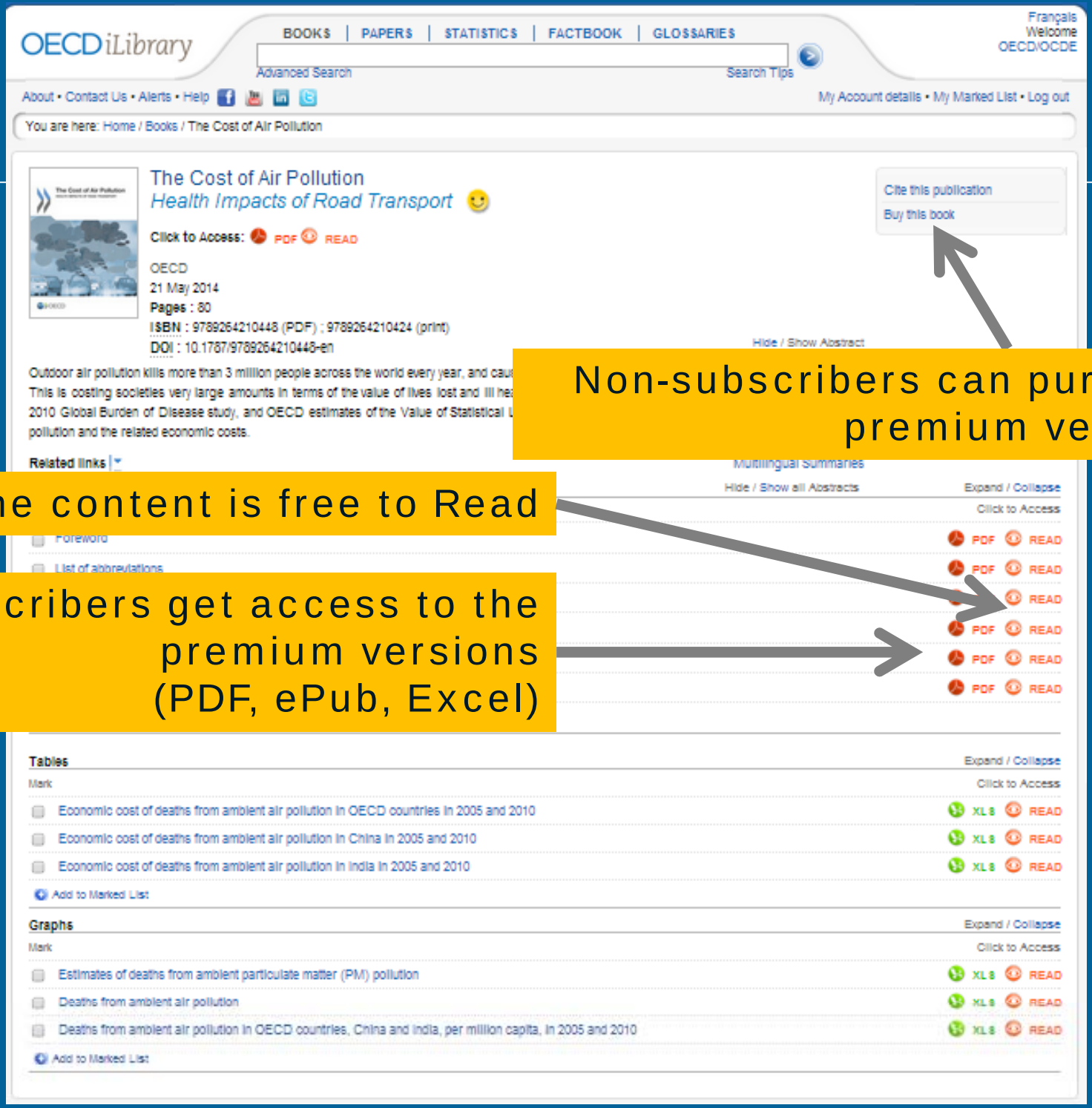
But we have also learned
to let go
we now encourage anyone to
read and then
share and embed
our publications in
their websites
and blogs for free

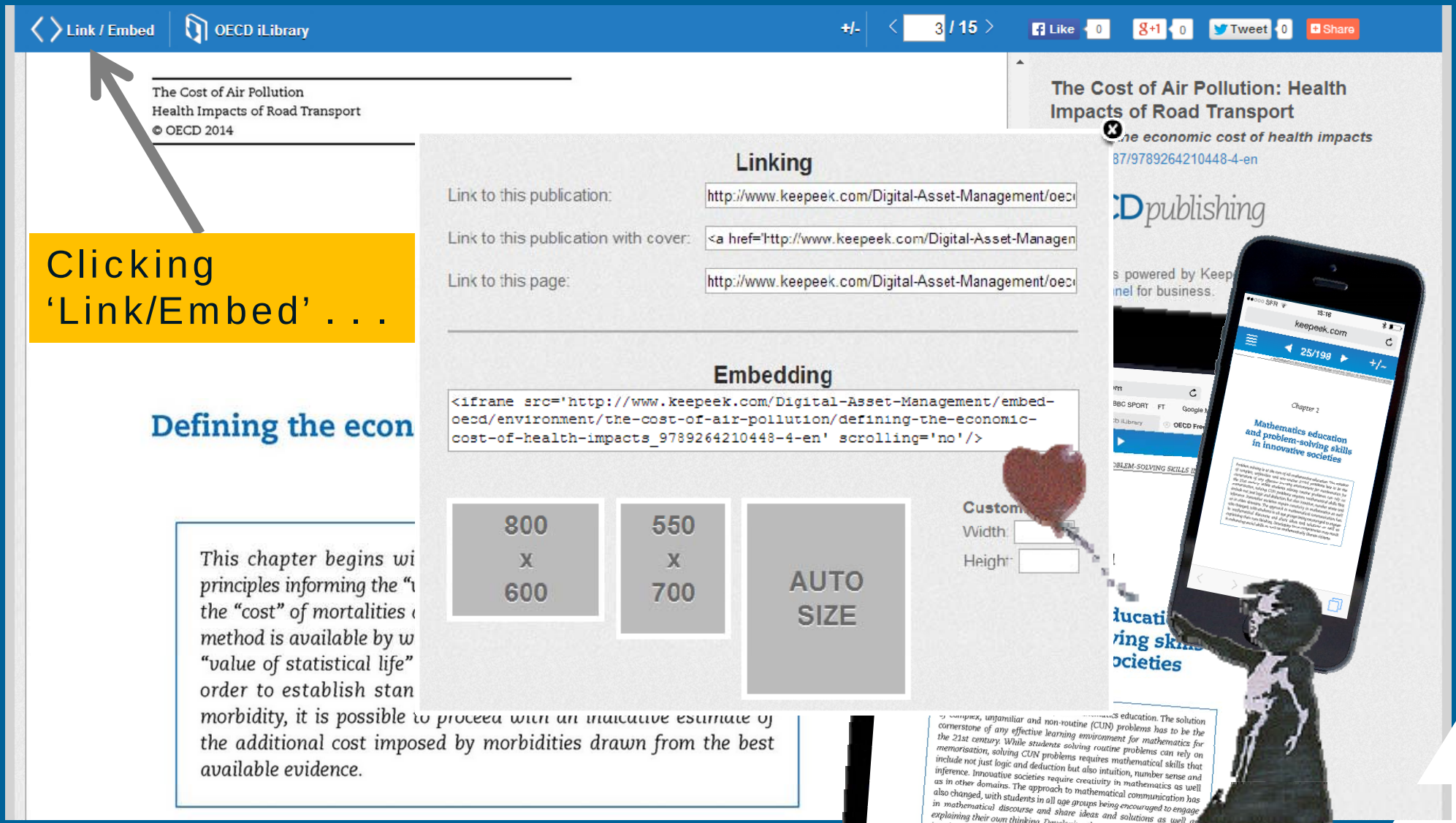


Non-subscribers can purchase the premium versions too

All the content is free to Read

Subscribers get access to the premium versions (PDF, ePub, Excel)

Read versions are optimised for all devices . . . and then we let go . . .

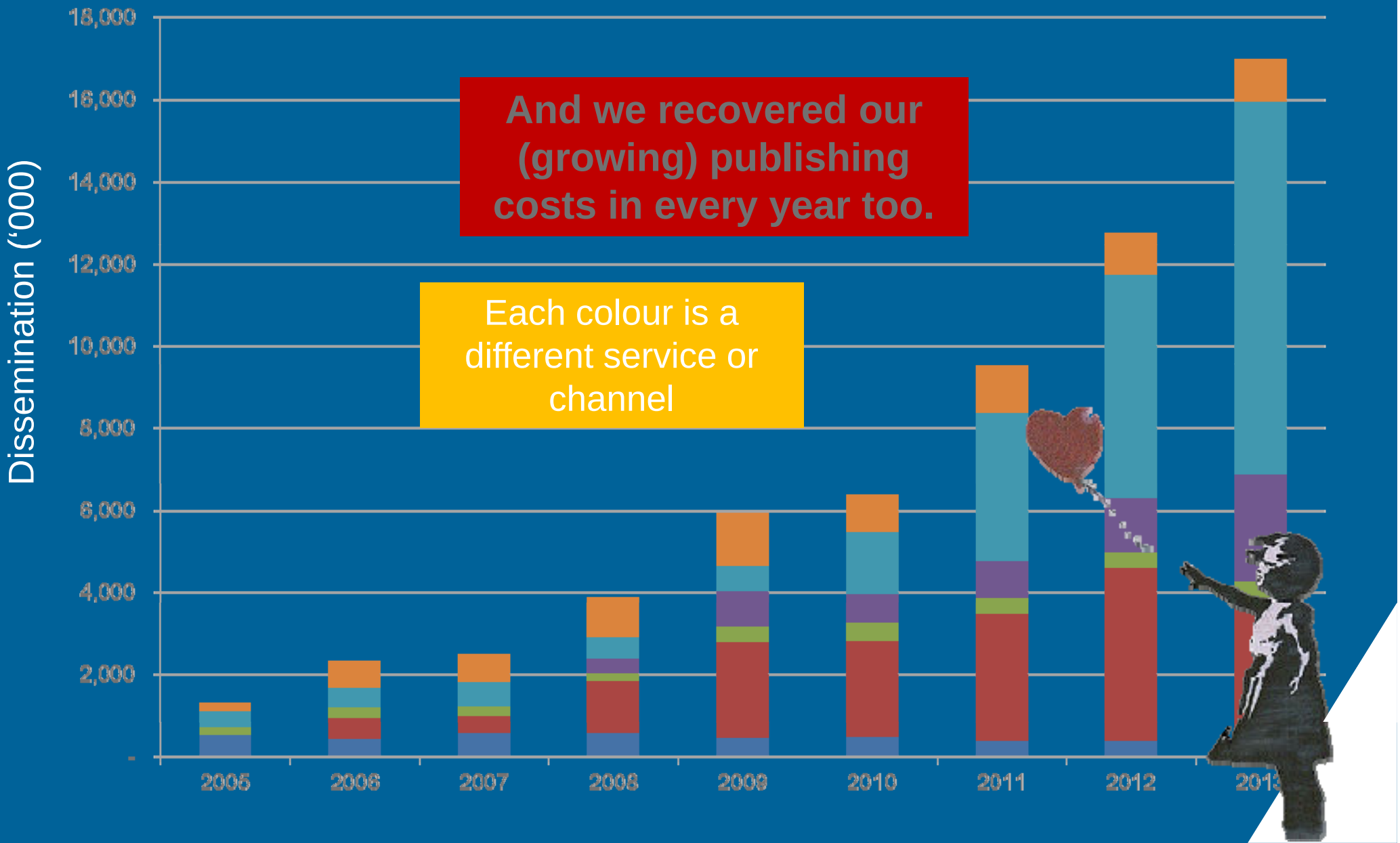


No permission or license required . . .

Because it's embedded, we know it's there . . .
. . . and we know the traffic too.

These buttons lead to the premium versions on our website.

Do we fulfil our mandates
On dissemination? On cost recovery?



iLibrary Counter based Global Usage
updated til 23rd March 2015

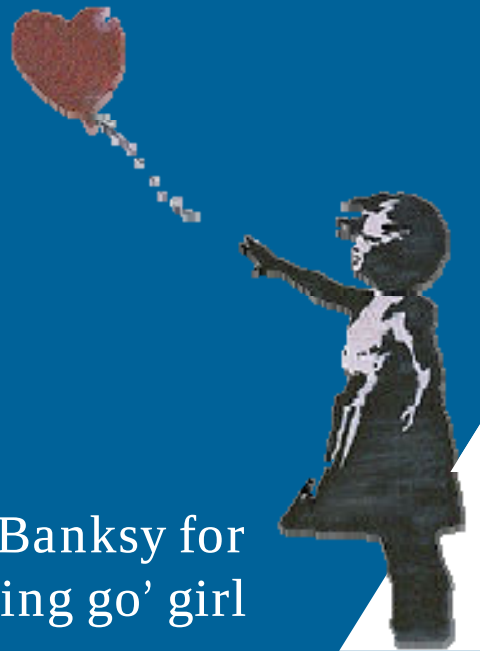
Country	Parent InstitutionName	Parent RegistrationType	2011	2012	2013	2014	2015
			1,987,201	3,147,324	6,527,065	8,663,859	2,149,736
United States			13,880	17,492	108,852	75,054	3,096
United States	UN Consortium	Consortium Parent	16,951	18,509	23,900	24,315	4,135
Belgium	Central Library of the EC	Master Registration		12,294	18,882	21,947	4,794
Belgium			10,606	14,663	18,889	20,492	2,985
United States	IMF WORLDBANK	Stand-Alone	13,872	16,074	18,036	18,437	3,175
United States	Pennyslvania State University	Stand-Alone	1,684	1,906	2,544	16,714	
Brazil	CAPES OECD Consortium	Consortium Parent	9,236	9,535	11,957	13,322	1,481
Brazil			9,311	9,730	11,707	12,669	1,406
United Kingdom	London School of Economics and Political Science	Stand-Alone	11,762	14,990	15,105	12,649	2,164
United States	Harvard University Libraries	Master Registration	4,902	6,318	6,896	11,125	673
Czech Republic	University of Economics Prague	Stand-Alone	8,942	9,949	11,768	10,627	1,156
United States	UNIVERSITY OF WASHINGTON	Stand-Alone	1,433	1,609	1,837	10,245	381

In conclusion – Is Freemium a better form of OA?

- **Freemium means actively building an audience**
  (You can be Free and not have readers)
- **Freemium keeps the audience in the driving seat**
  (You can be Free and ignore reader needs)
- **Freemium means innovation**
  (You can be Free and stop innovating)
- **Freemium delivers value for money**
  (You can be Free and build services that no one uses)
- **Freemium gives taxpayers/funders a choice**
  (To be Free taxpayers/funders must pay)
- **Freemium is compatible with Gold** – Funders can choose to make premium features free for everyone

Go **Freemium** Open Access!

Thank you & Questions?



And thanks to Banksy for
the ‘letting go’ girl