



Spotlight Series

Solutions and Services for the Future of Scholarly Publishing

Q&A with Neil Blair Christensen Head of Publisher Relations

Neil Blair Christensen is the Head of Publisher Relations for Oable, part of Wiley Partner Solutions. We caught up with him to find out what's currently happening in our effort to bring open access to scholarly publishing.

Can you explain what Oable is?

Oable is a software service that institutions use to manage their own approval, payment, and reporting of open access (OA) articles across all publishers globally. We're talking about articles that are subject to Articles Processing Charges (APCs) or Transformative Agreements (TAs), so that someone at the institution needs to review the situation and decide whether the institution is going to pay the charge and/or whether the article meets the requirements of a publishing agreement between a publisher and the institution. Think of Oable like an accounting or procurement software solution that an organization decides to use to keep track of all the requests and transactions across all businesses that they interact with—like QuickBooks or SAP—but designed for OA publication transactions. Institutions decide whether or not to use it; they are the paying customers.

Roughly speaking, if authors at an institution publish 3,000 OA articles per year linked with APCs or TAs, in the current model, people at the institution have to review and approve every single one of those requests to make sure they meet the institution's eligibility criteria for making payment or fit a possible publishing agreement.

Does it fit the eligibility criteria? Did we get the right discounts? Do they have the right billing details? Do we need the author to go back and request some changes? Does the journal qualify for a particular agreement? There can be many things to check, and this takes a lot of time and manual effort. Maybe the people reviewing the request are not the same people who make the payment. It's one thing for publishers to be able to smoothly issue invoices or approval requests, but it's another thing for an institution to process these requests through its own workflows and systems, let alone being able to report on this for its own purposes. All of that can easily accumulate into a couple of hours work for each request.

As part of this process, institutions may need to log in to and out of many different publisher-centric systems to engage with hundreds or thousands of different publishers. Oable solves these issues. Oable allows institutions to engage with all these publishers within one system, then takes care of exchanging data with the many different publisher systems.



What are some major pain points for publishers that Oable is tackling?

When you run a publishing business, it's always a priority that customers can easily work with you.

It's not enough to be able to issue an invoice or approval request really efficiently within our own organization, because when an institution receives that invoice, it will have its own internal processes or systems to process these requests. When institutions have many OA charges to approve and pay from many different publishers, imagine all the things that can come up. The price is incorrect. Some discounting scheme was applied incorrectly. The reference number was incorrect. The billing details need to be changed. The publisher isn't yet in the institution's PO system. The invoice applies or doesn't apply to a particular agreement. All those hurdles and more, add work, reduce customer satisfaction, and may slow down publication.

Oable makes it much easier for institutional customers to do business with thousands of publishers using one institutionally chosen system, and this benefits publishers too—not to mention the authors who are stuck in the middle.

So it's easier for big publishers to work effectively with institutions, and easier for small publishers to not get stuck when they transact a couple of times per year with a given institution.

That's very interesting to know, because it speaks to the ecosystem of the institution, the author, and the publisher, and how it's all connected. So thank you for that.

Now going a bit more into numbers, how many publishers are currently using OABLE, and how many are in the pipeline?

Because Oable is implemented and paid for by institutions, any publisher may find themselves interacting with Oable; the number of publishers using Oable is the number of publishers that transact with institutions using Oable.

There are over 2,000 OA publishers globally, so that's 2,000 publishers whose requests institutions can manage using Oable.

We can also look at the segment of OA transactions that are related to transformative agreements (TAs). To effectively manage TA publications, Oable “speaks” directly with the publisher's system and is programmed to follow the agreement's rules. Some 53 publishers around the world currently offer TAs; Oable is currently integrated and exchanging data with just 12 of them, but those 12 represent 61% of all TA publications!. Another 20 publishers, representing a further 17% of TA publications, are supportive of Oable but haven't yet been integrated, so we'll soon be at 78%.

Remember, just 52 of 2500+ OA publishers currently offer TAs. While TAs are a great model for a small slice of publishers, which Oable is ideally positioned to serve via systems integration, other OA publishers benefit too.

Publishers gain access to basic reporting from Oable, so they can track their interactions with institutions that use Oable and receive approval alerts directly from Oable. Overall, we have more 60 publishers that are supportive of Oable, but not all require systems integration.

What future problems do you see for publishers and institutions who don't integrate Oable?

The article economy is a service and a scale economy, and any publisher who doesn't make things easy for its customers becomes less attractive. If my publishing business relies on being able to transact a growing number of OA units, and if my institutional customers are also dealing with hundreds of other publishers, then it's critical for me to partner effectively with those customers. If I can't work effectively at a publication unit level, how effectively can I operate at growing scale and complexity?

When it comes to information exchange, we rarely see things become less or simpler; we may make them seem simpler by creating new systems, but under the surface we find increasing complexity and scale. OA is no exception. It may come as a surprise to publishers that some institutions employ FTEs just to manage their OA transactions—but if your organization is finding it difficult to keep up today, assume that keeping up will only become more difficult, because there will be more OA and the transactions will become more complex.

But your question was about integration! If you're not a publisher who offers TAs, then you don't strictly need to integrate with Oable, because institutions can still use it to process your APC requests. But if you do integrate, Oable can pre-populate the dashboards that institutional admins see with your requests, we can send you responses directly from Oable, and you can make it very easy for institutions to pay you from within their own choice of system.

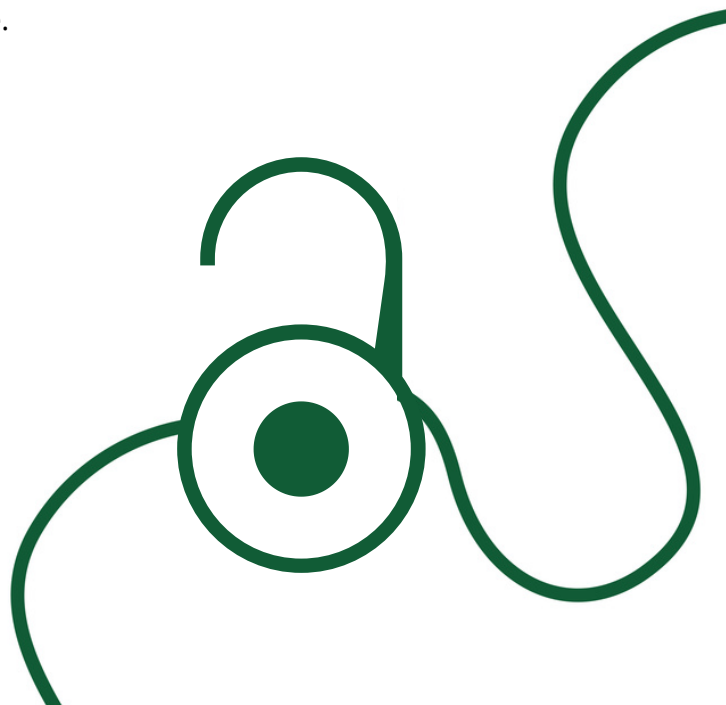
How do you see the transition to OA impacting other players in the publishing ecosystem,

such as research funders?

I assume that everyone will account for what they spend, what it's used for, and its publication-level impact with increasing granularity. Everything is becoming increasingly granular, which increases the effort required—whether you're an author, a funder, an institution, or a publisher. OA may sound simple, but doing it programmatically with the models in place today, and at scale, requires significant and increasing effort by all parties as the ecosystem becomes more complex.

How do you expect Open Access policy changes in the US and EU to impact librarians?

There's a saying that is normally applied to new technology but may also apply here: We tend to overestimate short-term effects and underestimate long-term effects. It's anyone's guess how soon, how late, or how much a specific policy change will impact someone. But one indicator that seems clear is that there will be more open access publishing and managing it will become more complicated. Librarians are busy with many things; counting articles, checking eligibility, raising payments and approvals, and reporting on all this activity is probably not how they want to spend their valuable time.



So what do you foresee Oable doing for the next year or the next few years?

We are currently onboarding 50 to 90 institutions per week, and we're working toward onboarding over 2,000 institutions in 2023. In parallel, we're partnering with more publishers and their third-party systems where needed. We want to add more direct and third-party publisher integrations to maximize utility for institutions in TA publications, as well as smoothing the workflow for APC transactions by exchanging data to populate institutional Oable dashboards and making it easy for institutions to approve and pay APCs.

From a publisher's point of view, you can think of Oable as an institutional OA brokering platform that makes it easy for publishers to get requests approved and paid, makes it easier for institutions to work with publishers, and reduces the ineffective use of authors as go-betweens. Within that framework, there are lots of things that Oable can help optimize, and our product management is diligently assessing and planning the ongoing roadmap in collaboration with institutions, publishers, and third-party vendors. Oable is all about working on solving challenges in this space.

Neil Blair Christensen has been the Head of Publisher Relations for Oable, part of Wiley Partner Solutions, since the beginning of 2022. Neil has been working in scholarly publishing and information services for over 20 years and is currently driving publisher relations for Oable.

Can you tell us a bit about the most interesting part of your job and/or the industry that you work in?

I get to work in the area of brokering and managing open access between publishers and institutions. I joined our team because I find this to be critically important in scholarly communication.

Tell us three interesting/fun facts about yourself.

I was born in Greenland, I'm Danish-Jamaican, and I once published a book called *Inuit in Cyberspace*.



If you would like to know more about Oable or connect with us, visit www.Oable.org.