

Transforming Scholarly Publishing through Open Access: A Bibliography

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Transforming Scholarly Publishing through Open Access: A Bibliography presents over 1,100 journal articles, books, and other textual works. It covers open access overviews and theory, economic issues, copyright arrangements for self archiving and use, open access journals, e-prints, disciplinary archives, institutional repositories, metadata issues, open access mandates and policies, electronic theses and dissertations, the open archives initiative and OAI-PMH, library issues, conventional publisher perspectives, open access legislation, government reviews, funding agency mandates, and policies, open access in countries with emerging and developing economies, and open access books. This bibliography updates and expands the *Open Access Bibliography: Liberating Scholarly Literature with E-Prints and Open Access Journals*. It is available as a low-cost paperback, a paperback PDF file, a website, and a website PDF with live links.

In a [Best Content by an Individual award](#) to the author for his publications, the *The Charleston Advisor* said: "This work gives an outstanding overview of scholarship relating to the growing Open Access movement."

In the *Journal of the Medical Library Association*, M. Blobaum said: "Bailey is a master of compiling lists of articles, web pages, white papers, and books on a particular topic and distributing them to a wide audience. . . . This bibliography, like the others, is extensive and well organized with topical subheadings. A preface helps readers understand what "open access" means and what models are available. . . . This bibliography is recommended for everyone interested in open access publishing."

Dedication

In memory of [Paul Evan Peters](#) (1947-1996), founding Executive Director of the Coalition for Networked Information, whose visionary leadership at the dawn of the Internet era fostered the development of scholarly electronic publishing.

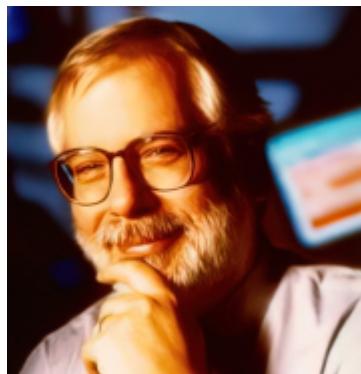


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Preface ↑

Transforming Scholarly Publishing through Open Access: A Bibliography presents over 1,100 selected English language scholarly works useful in understanding the open access movement's efforts to provide free access to and unfettered use of scholarly literature. The bibliography primarily includes books and published journal articles. A limited number of book chapters, conference papers, dissertations and theses, magazine articles, technical reports, and other scholarly works that are deemed to be of exceptional interest are also included. The bibliography does not cover digital media works (such as MP3 files), news articles, editorials, interviews, letters to the editor, presentation slides or transcripts, unpublished e-prints, weblog postings, or e-mail messages.

The bibliography includes links to freely available versions of included works. Such links, even to publisher versions and versions in disciplinary archives and institutional repositories, are subject to change. Typically, URLs may alter without warning or automatic forwarding, and they may disappear altogether. Inclusion of links to works on authors' personal sites is highly selective. Links are checked as of 8/1/2010. Note that e-prints and published articles may not be identical.

Most sources have been published from January 1, 1999 through August 1, 2010; however, a limited number of key sources published prior to 1999 are also included.

A Short Introduction to Open Access ↑

There are two types of open access. *Gratis open access* means that a scholarly work is free of charge.¹ *Libre open access* means that a scholarly work is free of charge and some or all restrictions on its reuse, such as translating it, have been removed. Open licenses are often used to grant users rights to reuse libre open access works. For example, the Public Library of Science uses the Creative Commons Attribution License for the journals it publishes.

There are two major open access strategies.² *Open access journals* publish articles (typically peer reviewed articles) that are free of charge and, depending on the journal, may be able to be reused under an open license. *Self-archiving* involves authors (or librarians acting for authors) depositing of journal articles (or other works) in digital repositories. These are free of charge, and, depending on the copyright holder (author or publisher), may be able to be reused under an open license.

are typically prepublication versions of articles. An e-print is often the final author version of an article that has been accepted by the journal before final editorial changes have been made. However, depending on the copyright holder, an e-print may be the final published version of the article.

Authors self-archive on personal websites, departmental websites, departmental digital archives, disciplinary archives, and institutional repositories. A *disciplinary archive* is a global digital repository that contains (and possibly other kinds of works) that deal with one or more scholarly disciplines. An *institutional repository* is a digital repository specific to a single institution that contains diverse types of digital works that deal with all of the disciplines associated with that institution. Institutional repositories typically use either specialized open source software, such as Eprints, DSpace, or Fedora, or are hosted on remote servers for a fee, such as the Digital Commons. A computer protocol known as OAI-PMH allows metadata (descriptive information) about works in digital repositories to be harvested (i.e., automatically retrieved).

While open access works are freely available, they are not free to produce or make accessible.³ Consequently, an important issue is how to pay for making open access works available. For example, some open access publishers charge authors fees to publish articles (these fees may be waived if the author cannot pay), others rely on subsidies from sponsoring organizations, such as universities.

There is a growing trend for universities, funding organizations, and governments to mandate in formal policies that articles created with their funding or subsidy be made open access. In some cases, universities may suggest, rather than require, that this be done in open access policies.

While traditional publishers have been understandably concerned about the impact of open access on their business models, an increasing number of them are offering some type of open access option. Some publishers have completely converted to a full open access business models, and some new publishers have been established using one. Some traditional publishers have also made special arrangements to provide open access to fee-based works to scholars in developing countries.

Notes

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(For a current list of relevant works see: "Open Access Works")

About the Author ↑

Charles W. Bailey, Jr. is the publisher of Digital Scholarship. He has over 30 years of information and instructional technology experience, including 24 years of managerial experience in academic libraries. From 2004 to 2007, he was the Assistant Dean for Digital Library Planning and Development at the University of Houston Libraries. From 1987 to 2003, he served as Assistant Dean/Director for Systems at the University of Houston Libraries.

Previously, he served as Head, Systems and Research Services at the Health Sciences Library, The University of North Carolina at Chapel Hill; Systems Librarian at the Milton S. Eisenhower Library, The Johns Hopkins University; User Documentation Specialist at the OCLC Online Computer Library Center; and Media Library Manager at the Learning Resources Center, SUNY College at Oswego.

Bailey has been an open access publisher for over 23 years. In 1989, Bailey established PACS-L, a mailing list about public-access computers in libraries, and *The Public-Access Computer Systems Review*, the first open access journal in the field of library and information science. He served as PACS-L Moderator until November 1991 and as Editor-in-Chief of *The Public-Access Computer Systems Review* until the end of 1996.

In 1990, Bailey and Dana Rooks established *Public-Access Computer Systems News*, an electronic newsletter, and Bailey co-edited this publication until 1992.

In 1992, he founded the PACS-P mailing list for announcing the publication of selected e-serials, and he moderated this list until 2007.

In 1996, he established the Scholarly Electronic Publishing Bibliography (SEPB), an open access book that has been updated 80 times.

In 2001, he added the *Scholarly Electronic Publishing Weblog*, which announces relevant new publications, to SEPB.

In 2001, he was selected as a team member of *Current Cites*, and he has subsequently been a frequent contributor of reviews to this monthly e-serial.

In 2005, he published the *Open Access Bibliography: Liberating Scholarly Literature with E-prints and Open Access Journals* with the Association of Research Libraries (also a website).

In 2005, Bailey established Digital Scholarship (<http://digital-scholarship.org/>), which provides information and commentary about digital copyright, digital curation, digital repositories, open access, scholarly communication, and other digital information issues. Digital Scholarship's digital publications are open access. Both print and digital publications are under versions of the Creative Commons Attribution-Noncommercial License.

He also established DigitalKoans, a weblog that covers the same topics as Digital Scholarship.

From February 2005 through August 2012, Bailey published the following books in paperback and PDF formats: the *Scholarly Electronic Publishing Bibliography: 2008 Annual Edition* (2009, also a Kindle e-book), Digital Scholarship 2009 (2010), *Transforming Scholarly Publishing through Open Access: A Bibliography* (2010, also a website), the *Scholarly Electronic Publishing Bibliography 2010* (2011), the *Digital Curation and Preservation Bibliography 2010* (2011), the *Institutional Repository and ETD Bibliography 2011* (2011), and the *Digital Curation Bibliography: Preservation and Stewardship of Scholarly Works* (2012, also an EPUB file).

During this period, Bailey also published and updated the following bibliographies as websites with links to freely available works: the *Scholarly Electronic Publishing Bibliography* (1996-2011), the *Electronic Theses and Dissertations Bibliography* (2005-2012), the *Google Books Bibliography* (2005-2011), the *Institutional Repository Bibliography* (2009-2011), the *Open Access Journals Bibliography* (2010), the *Digital Curation and Preservation Bibliography* (2010-2011), the *E-science and Academic Libraries Bibliography* (2011), and the *Research Data Curation Bibliography* (2012).

In 2011, he established the LinkedIn Digital Curation Group.

For more details, see the "Digital Scholarship Publications Overview."

In 2010, Bailey was given a Best Content by an Individual Award by The Charleston Advisor. In 2003, he was named as one of Library Journal's "Movers & Shakers." In 1993, he was awarded the first LITA/Library Hi Tech Award For Outstanding Communication for Continuing Education in Library and Information Science.

In 1973, Bailey won a Wallace Stevens Poetry Award. He is the author of *The Cave of Hypnos: Early Poems*, which includes several poems that won that award.

Bailey has written over 30 papers about digital copyright, expert systems, institutional repositories, open access, scholarly communication, and other topics.

He has served on the editorial boards of *Information Technology and Libraries*, *Library Software Review*, and *Reference Services Review*.

He holds master's degrees in information and library science and instructional media and technology.

(For current information about Bailey, see his [profile](#) and [vita](#).)

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