The past, present, and future of American university presses: A view from the left coast
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Key points
• American university presses have proved remarkably resilient but now face a daunting set of internal and external challenges.
• At the heart of university press challenges is the future of the monograph – critical to scholarship, resistant to change, and declining in sales volume.
• Internal pressures on presses to be more accountable and self-sustaining are growing.
• Presses are beginning to address current challenges – individually and collectively – with energy and optimism and a renewed level of collaboration.

A century after university publishing began to flourish in the United States, American presses find themselves at a crossroads. The relentless pace of change, driven by technology, continues its profound transformation of the landscape, and no place is this clearer than in the University of California Press’ home here in California.

Here, on the edge of the Pacific Rim, away from the dominant influences of Europe on the east coast, we are on the margins, and in my view, the margins are where the most interesting things happen. We sit at the epicentre of major geopolitical shifts; globally important research centres; the economic and cultural influences of dramatic demographic changes and new technologies; and leading environmental, political, and social initiatives from the Free Speech Movement and Cesar Chavez’ activism in the 1960s and 1970s to the Black Lives Matter movement today. There are rich opportunities for a university press that sits at the heart of one of the world’s greatest public research universities, yet by the time I joined the press 5 years ago, it was very clear that business-as-usual was no longer an option.

The challenges faced by UC Press are not dissimilar to those faced by many of our sister presses: declining institutional support, the dominance of commercial publishers in the profitable areas of scholarly publishing, and the growing agenda-setting power of large technology organizations. At the same time, other emerging trends are creating spaces for us to grow into: technology enables us to open up content that has been locked away in print for decades; conceptions of peer review and quality metrics are shifting; scholars across disciplines are seeking greater control of their intellectual property and trusted partners in this enterprise; and the output of scholarly research is increasingly part of a more dynamic, open, digital space.

A BRIEF HISTORY

The history of American university presses over the past century or more is largely one of growth but also one of impressive resilience. Although university press publishing began much earlier at some European universities, it was not until the late nineteenth century that presses began to emerge in the United States. The first American university press to operate under the name of its university was established by Andrew D. White at Cornell University in 1869, with the prize for the oldest, continually operating press in the United States going to Johns Hopkins University Press. In establishing the press in 1878, President Daniel Coit Gilman famously noted the common purpose that both press and university served: ‘It is one of the noblest duties of a university to advance knowledge, and to diffuse it not merely among those...’
who can attend the daily lectures – but far and wide’. And so, the press’s role in publishing was thus established as inextricably linked to the emerging modern research university; if discovery and knowledge were to advance, they had to be shared.

The rapid spread of university presses continued through the early twentieth century, with Chicago, California, Columbia, Toronto, Princeton, Fordham, Yale, and Washington all founded by 1910. By the 1920s, press representatives met regularly at a gathering of the National Association of Book Publishers, focusing on joint sales and marketing initiatives. The Association of American University Presses was formed in 1937, and by 1957, it counted 38 members. With money flowing into higher education, the post-war era was a golden age for university presses, which continued to multiply and to grow output.

However, by the 1970s, declines in library purchasing of monographs had already set in, and over the past couple of decades, the challenges to presses have been compounded by continuing declines in library book budgets, increasing consolidation in scholarly publishing, the remaking of the retail landscape, and by the advent of the digital age (Sherman, 2014).

THE PRESENT: A NEW DIGITAL UTOPIA?

Today, American university presses remain a vibrant part of the scholarly communication ecosystem. Perhaps as never before, they also face challenges from all sides. Technology has provided the tools to improve the openness, speed, and impact of scholarly communication, and while technological innovations such as short-term printing have clearly brought significant benefits to university presses, wider change has been slow, and our ability to reap the potential remains limited.

Why might this be? Arguably, the structure of our industry and its concentrated ownership plays a role – for example, a handful of organizations control over half the market for scholarly journals – but the newspaper and trade publishing markets are also relatively concentrated, and they have been disrupted in much larger ways. The biggest difference in the scholarly world is the role of the universities and institutions that control access, funds, and policy. As university presses, we have to negotiate our way through this complex architecture, and we often share with our institutions a conservative, incrementalist approach. Although there are an increasing number of exceptions, in aggregate, we have struggled to think beyond the print book, a phenomenon that has been exacerbated by our weighting towards the humanities and social sciences.

While presses have been impressively resilient throughout all of this, we now face the significant challenges of the digital environment, open access and their impact on the monograph. In the past, university presses have focused on content. There is absolutely no doubt that we publish top-quality content that retains its value and impact for decades, but the old print paradigm of a one-way push of content to readers is gone, and it is proving more and more difficult to extract value from content alone. A new generation of readers is challenging conventional notions, and we can no longer rely on great content for our success. We must also learn to be innovators, as well as skilled in user experience and content discovery techniques.

THE PRESSURES ON AMERICAN UNIVERSITY PRESSES

Like so many businesses today, American university presses face the mental balancing act of innovating for the future at the same time as attending to the products and processes of the past, and the pressures on our legacy business are both real and growing.

- Perhaps the most significant challenge for presses has been the decline of monograph sales, which now typically average just 3–400 copies per title. New access and purchase models, such as short-term loan and demand-driven acquisition, may have made things easier for libraries, but they have only exacerbated the burden on presses. As an illustration, at UC Press, our revenue per unit for e-books is, on average, about a third of what we earn for print. Top this with a wholly reconfigured retail landscape with one very dominant player and it is clear that the marketplace dynamics are daunting.
- Presses also face very real internal pressures. The increasing scrutiny of every budget line has meant that presses, like every other campus entity, need to be able to demonstrate that they contribute in real and concrete ways to their institution. Many presses have experienced declining institutional subsidies at the same time as requirements for financial sustainability are increasing.
- The addition of e-books has burdened all presses with the dual running costs of print and digital, adding increased expenses for file conversion, digital asset management, and more.
- Beyond that, the reality is that most presses have relatively high cost structures. One of the aspects of our work most valued by authors is the developmental and curatorial role played by our editors. As highlighted in the recent Ithaka report on the cost of monographs, this is in large part what makes it difficult to automate monograph publishing to drive down costs (Maron, Mulhern, Rossman, & Schmelzinger, 2016).

American university presses have begun to take advantage of new opportunities and technologies, but we are not doing so in a vacuum. As my fellow Scholarly Kitchen chef Joe Esposito notes (Esposito, 2016), a real challenge for publishers is the way in which the habits of users are being shaped by the Four Horsemen of the Internet: Amazon, Facebook, Apple, and Google. These big tech companies have defined expectations, and even as university presses are compared to Amazon’s convenience, Facebook’s ubiquity, Apple’s coolness, and Google’s magic.

So how can we as university presses do more to satisfy readers’ and users’ needs? A starting point for many of us has been reinvigorating our mission. Our commitment to scholarship – especially that which does not have an immediate market value –
is resolute, but many of us have wider questions to answer. What do we want to accomplish in the rapidly changing publishing industry? How must we adapt to new challenges? How will we serve our universities and our mission while growing our revenues and becoming more self-sustaining?

CASE STUDY: UNIVERSITY OF CALIFORNIA PRESS

At UC Press, we began by sharpening our mission and purpose both to embrace the public service mission of the University of California and the progressive reputation of both UC Press and California more widely. We believe that a scholarship is a powerful tool for fostering a better understanding of our world and changing how we think, plan, and govern, and our role is to add impact and visibility to that scholarship.

But before we could begin to translate this mission across our programme, we had some hard work to do. The pace of change required us to assess more carefully than ever before the skill and experience base that would enable us to create a flexible and nimble organization, strategically focused and ready for the challenges ahead. For UC Press, this involved restructuring our organization and our workflows; hiring new digital skill sets; engagement with our markets and users that we have not had in the past; and developing comfort with constant change and a capacity to innovate.

We have focused our resources on core disciplines and markets for a clearer sense of purpose and differentiation, as well as operational economies and efficiencies. We now think about these programmes in a more inclusive manner across the research and teaching spectrum, beyond just scholarly books and journals, to answer the question: what does it take to become the leading publisher in our chosen fields?

Finally, we began to embrace the digital future and saw this as another way to distinguish UC Press. We were well positioned to implement a forward-thinking digital strategy around community, transparency, knowledge curation, and crediting. As part of the University of California, we belong to one of the greatest knowledge networks in the world and are located in a region with unrivalled digital expertise. We are poised to launch initiatives that will become the source of future growth. Perhaps the most intractable challenge for us – and, no doubt, for most presses – has been the future of the monograph.

THE MONOGRAPH IS DEAD: LONG LIVE THE MONOGRAPH!

Monographs are the heart of university press publishing; our fundamental role is to serve as a channel for scholarship that does not have an immediate commercial return. The monograph remains a vital vehicle for scholarly communication in many fields, not to mention the gold standard for promotion and tenure. As such, its uncertain future has received much attention over the past couple of years, with studies such as the Crossick Report (Crossick, 2015) and the OAPEN-UK report (Collins & Milloy, 2016) in the United Kingdom alongside important work funded by the Andrew W. Mellon Foundation in the United States (Elliot, 2015; Hilton et al., 2015).

The monograph serves two critical and at times conflicting functions in the humanities and qualitative social sciences. It is a vehicle for expanded thought about a scholarly argument, and it is also a signal of academic achievement and prestige for its author – one that is essential for career progression. These disciplines also remain heavily attached to print and deeply invested in the slow forms of knowledge making represented by the monograph.

Such factors help to explain why monograph publishing has remained very conservative over the years and mostly untouched by the opportunities presented by networked digital media. If not dead, then perhaps, the monograph is simply ‘undead’, as Kathleen Fitzpatrick suggests – not viable but still required (Fitzpatrick, 2011).

Nonetheless, there are still many who would argue that the monograph is not in crisis. It is a point Geoffrey Crossick makes in his report and that Richard Fisher argued in his thoughtful Scholarly Kitchen post, based on the fact that monograph output in the United Kingdom at least has more than doubled since the year 2000 (Fisher, 2015). But whether or not one believes that the current monograph model is fundamentally broken, I would question whether output is the right measure of our success as university presses. What about impact and dissemination? Arguably, our missions give us a responsibility to extend circulation as far as possible, ideally to all who are interested in and may profit from it – certainly beyond the narrow distribution of the current model.

UC Press, along with a handful of other presses, has been at the forefront of developing ways not only to preserve but to reinvigorate monographs through open, digital models. A wide variety of innovative initiatives have emerged from collective models, such as Knowledge Unlatched, to new programmes (such as Luminos here at UC Press) and new presses (such as Amherst College Press and Lever Press) and the development of shared infrastructure to support these new models. Given that the core challenge
of monograph publishing is that the revenue-recovery model is no longer adequate, all of these models seek to share cost recovery more widely across a range of potential funding sources.

We are still in the early days, but presses are learning a great deal, and many of the early indicators are impressive. Results from programmes such as Luminos and Knowledge Unlatched are helping to answer some fundamental questions:

- There is a wider demand for this content than the paywall model suggests, belying the inelasticity of demand that some argue exists. For example, the top 10 usage countries for the Luminos programme include Russia, Poland, India, Mexico, and Brazil – which would most certainly not be the case if we were looking at for-sale titles.
- Free digital editions do not (currently) undermine the potential of for-sale print editions. At UC Press, the sales of reasonably priced ($30–40) print copies of Luminos titles are no different than what we would expect for ‘traditional’ monographs.

There are still many questions and many legitimate concerns about OA monographs – such as the potential impact on institutional subsidies for presses and the implications for an increasingly adjunct faculty, but many presses see potential in OA for at least a portion of their lists.

**A NEW GOLDEN AGE?**

Where does all of this leave American university presses? Like the Greek God Janus, we must look both to the future and to the past. The best of American university presses – our role in discovering and shaping transformative scholarship – remains one of our principal value propositions, prized by authors, reviewers, and readers. The best of what university presses produce also shapes public conversation about enduring problems of poverty, segregation, inequality, family pressures, political participation, education, and a raft of other issues with which our society has to grapple.

But the current system of scholarly communication is all too often antiquated, inefficient, and slow. Along with increases in quantity of and access to information, we need to develop tools that will help users make more efficient and effective ‘expert’ use of our accumulating knowledge. We do not just need to publish more; we need to make it easier to find the necessary information from the increasing ocean of information and then to connect it with what we know.

So what of the future? Our past points to our ability to successfully innovate; JSTOR, Project Muse, and UPSO are all examples of long-standing collaborations between presses that have breathed new life into journal backfiles and now monographs and have become vital tools for scholarly research around the globe. There remain some critical challenges for American presses to reckon with over the coming years beyond the decreases in our traditional revenue streams:

- Open access has been slow to come to university presses, not least because the dominant Gold paradigm has been developed primarily for journals and STEM fields with enough research funding to pay publication costs, and simply does not translate to monographs or the humanities. Whether we like it or not, OA is going to play an increasingly important part in our futures, and we need to work out ways to engage productively.
- All presses will need to demonstrate the value they bring to their institutions in increasingly concrete ways. It is arguable that the strategy of flying under the radar has never been a good one, but it is no longer possible in a world of declining subsidies and increasing accountability. This may mean that not all presses will survive in their current form. Current trends suggest that some presses – especially smaller ones – will need to reshape their structure and mission to survive. This does not necessarily mean elimination, but rather a refocusing on the needs of their home institution and building new partnerships – especially with their library.

In this climate, collaboration will be the key to success and survival. Presses have always worked together effectively for the service aspects of their business that require scale – such as distribution – and this has begun to spread to other functions, such as the production process and technology infrastructure. There is a flurry of new activity in this field (supported in large part by a recent round of grants from the Andrew W. Mellon Foundation), and it is an area that also provides a perfect opportunity for partnership between presses and libraries. Collaboration with other organizations beyond campus will also increase as we are all tasked with serving a new and different set of stakeholder needs. We will all need to become experts at partnerships, cementing our core competencies and embracing the participation of others.

American presses are in a permanent state of flux. We can either make things harder by sitting back and waiting for things to happen or we can take charge and accept responsibility for our capacity to decide our futures. Over the past few years, I have seen American presses embrace this second option, and the vibrancy of recent AAUP meetings has been testament to this. University presses have always played a critical role in incubating and communicating pioneering scholarship. We now have the opportunity to play a lead role in opening up scholarly communication in the digital realm in ways that will support the goals of our institutions of furthering scholarship and diffusing it far and wide.

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