A report on the future of independent and scholarly publishing webinar by the Scholarly Kitchen

Phill Jones ⋆

Key points

- The open access movement continues to gain pace, resulting in increasing regulatory requirements that constrain business models.
- Plan S itself may only have a modest immediate effect on industry-wide sustainability but is the clearest indication of the 'direction of travel' for our industry yet.
- Recent negotiations between publishers and consortia represent a 'bigger deal' and may therefore lead to even greater economic power for large commercial publishers.
- Societies have a greater role than merely allowing researchers to get credit for and disseminate their work.
- A one-size-fits-all model of open access may threaten the sustainability of other community services managed by learned societies.
- Do not panic about Plan S! Look to the needs of your community and offer a balanced portfolio of publications and services.

Sustainability has become a watchword among learned society, university presses, and small, independent scholarly publishers. Increasing workflow complexity and technical requirements can drive up costs, while advancing regulatory requirements create constraints around business models.

The open access (OA) movement continues to gain pace at the policy level among funders, culminating most recently with Plan S, an initiative driven by cOAlition S, a group consisting of the European Research Council; a number of European national-level funders; and some charitable and international funders, including the Wellcome Trust, World Health Organization, and Bill and Melinda Gates Foundation. The Plan’s stated aim is to ensure that all scholarly publications arising from work funded by member funders is published in fully OA journals by 2021.

Plan S has led to an increased sense of urgency among many publishers. While analyses (Pollock & Michael, 2018) indicate that the immediate impact will likely be relatively modest, many publishers see Plan S as a strong indication of the direction of travel of funder policy that might eventually lead to a significantly reduced market size if the same approach were to be more widely adopted.

For many years, the industry has been undergoing significant consolidation (Larivière, Haustein, & Mongeon, 2015) with an increasingly large amount of scholarly content being published by a handful of large, commercial publishers that have the scale and resources to adapt to increasingly demanding and rapidly changing conditions. Taken together, these conditions leave many wondering how to adapt in order to remain sustainable as independent publishers. In early 2019, the Society for Scholarly Publishing (SSP) asked the Scholarly Kitchen to put together a webinar to discuss these issues. Working alongside Executive Director, Melanie Dolecheck and the SSP team, Head Chef and Editor-in-Chief, David Crotty, of Oxford University Press asked me (Phill Jones) to chair the webinar. Fellow chefs Karin Wulf of the Omohundro Institute, Robert Harrington of the American Mathematical Society (AMS) and Independent Publishing Consultant, Judy Luther were all recruited to participate. In particular, the group was interested in exploring the important role of learned societies in the scholarly publishing landscape, and the pressures on them, from a variety of disciplinary perspectives across science, social science, and the humanities.
We called the webinar *The Future of Independent and Scholarly Publishing*, and it was webcast on April 17th. About 100 people attended in person, and the recording can be viewed here on the SSP event page [www.sssnet.org/library/the-scholarly-kitchen-the-future-of-independent-and-society-publishing/](http://www.sssnet.org/library/the-scholarly-kitchen-the-future-of-independent-and-society-publishing/) or on YouTube [www.youtube.com/watch?v=yjNxmM7RtHg&feature=emb_logo](http://www.youtube.com/watch?v=yjNxmM7RtHg&feature=emb_logo)

**PRESSURES ON LEARNED SOCIETIES**

The way that journals are sold has changed over the years, as David Crotty explained. From sales of individual copies to both researchers and libraries to site licences and, most recently, sales of collections to consortia.

As models have changed, the market has increasingly favoured larger publishers that are able to offer economies of scale, particularly in the form of the big deal (Nicholas et al., 2005). Originally developed as an antidote to the serials crisis in which falling budgets and rising costs lead to a downward spiral of cancellations, the big deal enabled libraries to lock in deep discounts in exchange for whole-catalogue, multi-year deals (Duranceau, 2004; Frazier, 2001). The need to compete with economies of scale and low costs per download has led many smaller publishers to partner with larger commercial organizations and become part of those big deals (Steinberg, 2015; Ware, 2008).

It is tempting to think of the movement towards OA and the big deal as existing on two ends of a scale from free access to perpetuation of commercial models. Recent developments, however, have created conditions where these two industry trends have been brought into convergence. Specifically, negotiations between the German projekt DEAL consortium (Hunter, 2018) and a number of commercial publishers have folded OA author charges into consortia and larger publishers may take precedence, leaving little time for the long tail of smaller publishers.

**OH, THE HUMANITIES**

Karin Wulf, director of the Omohundro Institute of Early American History (EAH) and Culture, at the College of William and Mary, stated that the drive towards OA does not resonate as strongly in the communities that she works with. The Omohundro Institute has been serving the EAH community for 75 years, and while she admitted that some of her observations may be unique to that field and its economies and ecologies of practice, there are commonalities with other areas of the humanities.

Publishers, particularly when they are part of learned societies, institutes, or other broader organizations are more than a service to help researchers receive credit for and distribute their work. They create a social infrastructure that serves members of the academy in a variety of roles: as readers, authors, students, lecturers, and independent practitioners.

Karin argued that Openness – of which OA is a component – can be positioned as a moral value, but it can also be viewed as a value proposition. Karin pointed to evidence that, while scholars often say that they value openness, their decisions about where to publish are usually motivated by other factors (Blankstein & Wolff-Eisenberg, 2019). It is the risk of openness replacing – rather than augmenting – other types of value, such as access to a group of convened experts, that raises concerns in some quarters about erosion of the social infrastructure of academia.

**POLICIES, MANDATES, AND BUSINESS MODELS**

The AMS publishes journals, books, and databases that support the entire mathematical community with global reach. Robert Harrington stated that the AMS serves the entire community of mathematicians and not just their members. In that sense, there is common ground with the Omohundro Institute as the organization does not see its value proposition as purely being around publishing the version of record.

Like many societies, AMS is heavily reliant on publishing revenues (67%) for support (AMS, 2018). Uncertainty about how that will be funded in the future is naturally of concern.

Over the years, publishers have worked to comply with changing requirements. As an example, since 2014, AMS has offered a gold OA option in the form of equivalents of *Proceedings of the American Mathematical Society* and *Transactions of the American Mathematical Society* (identified as series B) in response to funder mandates (Pinfield, Salter, & Bath, 2017). Under Plan S, however, those titles were ruled to be minor journals and not compliant (‘Principles and Implementation | Plan S’, 2019).

There is an ever-increasing range of models that are being tested to try to accommodate this ever-changing landscape. The subscribe to open model from *Annual Reviews* (Crow, Gallagher, & Naim, 2019) requires a complete subscriber base to continue to support a journal, thereby separating cost of support from the decision to go OA. There are also publish-and-read, as well as read-and-publish, models. These latter models, however, are designed to shift the balance towards OA publication while continuing a level of subscription support and are therefore not compliant with Plan S.

Less common models include freemium, which is most famously practiced by Organisation for Economic Co-operation and Development (Green, 2017), and platinum OA (Björk, 2017; Haschak, 2007), where the costs of publication are underwritten by donors, an endowment, or a third party.

**HAVE WE BEEN HERE BEFORE?**

As Judy Luther, the independent publishing consultant on the panel pointed out, publishers have faced sustainability crises
before. During the 18th and 19th centuries, it was commonly believed that learned societies and academic publishing could not be conducted as a commercial enterprise. As Lord Rayleigh wrote to the British Exchequer in 1895:

A scientific journal... is not a profitable undertaking, even though the contributors are... paid nothing for their contributions...[because...] the expenses are so great, the public so small, and the incidental remuneration by advertisements so uncertain and insignificant... [Hence,] the scientific journals in this country [UK] are carried on with great difficulty... and at a loss

In the late 1950s, as commercial publishers were first entering the scholarly publishing sector (Cox, 2002), many learned societies found themselves struggling to meet operational costs (Fyfe et al., 2017). The Royal Society and the Nuffield Foundation commissioned Dr Frank Morley to write a pamphlet entitled Self-Help for Learned Societies. Dr Morley was an experienced publisher whose job was to compile commercial expertise from commercial publishers to help learned societies become more sustainable. He was the first modern publishing consultant.

As Judy pointed out in the webinar, what is different about today’s sustainability issues is the perceived risk of a tipping point. If OA journal content spreads widely enough, there is a fear of a loss of need for subscription journals, leaving the model untenable. As a result, many small publishers are looking at their collections and wondering which subject areas they should retreat from and leave to larger publishers who have the scale to cope with the market uncertainty discussed above.

Judy believes that this potential shift in business model requirements is compounded by shifts in researcher needs as data and other digital artefacts, once thought of as something shared not only by natural and physical scientists but also social scientists and humanists (Borgman, 2010).

ADAPTING WITH CARE TO A CHANGING LANDSCAPE

During the webinar, all panellists agreed that nobody should panic as the impact of Plan S may be less immediate than some fear. As Robert pointed out, only about 25% of authors that publish with AMS are funded, with a much smaller percentage being funded by cOAlition S funders. The situation at Omohundro Institute is more complicated according to Karin, where funding for research going into any given manuscript may be supplied by four or five different organizations. Figuring out which funder’s mandates should be prescriptive in this context is not straightforward.

Beyond the basic challenges of precedence and enforcement, there is a question of value. As mentioned above, scholars in EAH appear to value the support of the community in developing their scholarship through its lifecycle more than pure openness, or at least more than OA to journal articles. At AMS, the question has its own discipline-specific complications. Many mathematicians, used to passing manuscripts between themselves and disseminating with arXiv.org, already think of their discipline as open in this way, albeit using a mechanism other than free access to the version of record.

Plan S may indicate an acceleration of funder mandates towards OA, and smaller publishers should explore various models and offer a balanced portfolio of publishing options to mitigate those risks. They should explore the benefits and potential pitfalls of partnering with larger publishers and experiment with different models to see what works for their own communities.

As Karin said in closing, first and foremost, societies must ensure that they are serving the needs of their community. If they do that, then one way or another, there should be a model to make it work.

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