Research Community
- Peers in research area
  - colleagues, reviewers, editors
- Scholarly societies
- Discipline at large
- Colleagues yet to be known

Information Market
- For-profit publishers
- Not-for-profit publishers
- Digital repositories
- Google and company
- Libraries

University
- Academic Library
- Grant funders
- Taxpayers

Author/Researcher

Supporting/Subsidizing Stakeholders

Tenure & promotion
- Prestige: grants, best jobs
- Contribution to field
Scholarly publishing market in a nutshell

- Knowledge output is increasing
- Market is unsustainable economically
  - Library budgets losing ground
  - Publisher sales are flattening
  - Publisher growth coming from mergers
- Disruption greatest in scientific disciplines
- Disruption has spread to monographs
- Global financial crisis threatens further disruption
journals
24,000 peer-reviewed journals

1,300,000 peer-reviewed articles per year

1,200 scholarly publishers (est.)
### Journal publisher size guide

<table>
<thead>
<tr>
<th>Size Category</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Petite (5 or fewer)</td>
<td>54%</td>
</tr>
<tr>
<td>Small (6-10)</td>
<td>11%</td>
</tr>
<tr>
<td>Medium (11-25)</td>
<td>16%</td>
</tr>
<tr>
<td>Large (26-50)</td>
<td>8%</td>
</tr>
<tr>
<td>X-Large (51-100)</td>
<td>4%</td>
</tr>
<tr>
<td>XX-Large (100+)</td>
<td>7%</td>
</tr>
</tbody>
</table>

Scholarly publishing practice: academic journal publishers’ policies and practices in online publishing, 3rd survey, ALPSP, 2008
STM sector
$ 16.1 B
revenue in 2006

SSH sector
$ 3 B
STM sector in 2006

$5.8 billion
Elsevier  
Kluwer Health  
Springer  
Amer Chem Soc  
John Wiley Blackwell
merged with Wiley 2007

$10.3 billion
other 1,195 publishers

Data from Outsell’s 2006 STM market report
Dysfunction largely based on problematic economic model
normal economy

Steelmakers $\rightarrow$ Steel $\rightarrow$ Auto manufacturers $\rightarrow$ Cars $\rightarrow$ Consumers

$\leftarrow$ $\rightarrow$

$\rightarrow$$\leftarrow$

$\rightarrow$$\leftarrow$

$\rightarrow$$\leftarrow$
gift economy

Author → Article → Publisher

P&T
Grants
Reputation
Prestige

Journal → Library

$
The cost to produce one journal article

<table>
<thead>
<tr>
<th>Publisher</th>
<th>Average journal article</th>
<th>Faculty, PhD</th>
</tr>
</thead>
<tbody>
<tr>
<td>XYZ Commercial Publisher</td>
<td>$3,400</td>
<td>My Faculty, PhD</td>
</tr>
<tr>
<td>Amsterdam, London, New York</td>
<td></td>
<td></td>
</tr>
<tr>
<td>ABC Not-for-Profit Publisher</td>
<td>$730</td>
<td>My Faculty, PhD</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
does higher price buy better information?

- 9% $91% dollars
- 62% citations
- 38% citations

- Non-Profit
- Commercial
Libraries challenge pricing power

- Subsidizing journal start-ups
- Canceling journals
- Cutting book purchases
- Forming consortia
- Fighting mergers

Publishers try to sustain revenue flow

- Tying print to online
- Bundling journals
- Requiring multi-yr contracts
- Buying other publishers
- Raising prices
Scholarly communications reform includes efforts to establish balanced, sustainable economic models.
Open Access (hybrid)

- Grant/Research Foundation funding
- Subsidy: Author/Institution/Library pays
- Subscription to non-research content
- Advertising

Free to all readers
**OA journals published in 97 countries**

Top six OA-journal-producing countries

<table>
<thead>
<tr>
<th>Country</th>
<th>Count</th>
</tr>
</thead>
<tbody>
<tr>
<td>United States</td>
<td>858</td>
</tr>
<tr>
<td>Brazil</td>
<td>370</td>
</tr>
<tr>
<td>United Kingdom</td>
<td>326</td>
</tr>
<tr>
<td>Spain</td>
<td>233</td>
</tr>
<tr>
<td>Germany</td>
<td>152</td>
</tr>
<tr>
<td>Canada</td>
<td>113</td>
</tr>
</tbody>
</table>

From DOAJ via Heather Morrison, The Imaginary Journal of Poetic Economics, 3/10/09
books
15,802
University press publications in 2007
University Presses hard hit

Rice University          closed 1996*
Northeastern University   closed 2005
University of Georgia     downsized
University of Iowa        downsized
University of Washington  downsized
Texas Tech               downsized
Stanford University       restructured
University of Michigan    restructured

* Reborn 2006 as all digital, all OA press

Rich Baraniuk, SPARC-ACRL Forum, January 24, 2009
A crisis is a terrible thing to waste

three things to think about
Can publishers be persuaded that the system must change?

ICOLC & ARL Appeals to Publishers
Springer Hybrid OA/subscription model at UC
Elsevier’s visits to chancellors discounting IRs
Wiley increases on society journals
Long-term solution may include shifting of library funds from *collecting* to *producing or subsidizing* scholarly content.
Outsell, a market intelligence service, says “access-based models will not last.” Content is no longer king in the STM information business.
This work was created by Lee Van Orsdel for the ACRL National Conference, Scholarly Communications 101 Workshop and last updated July 16, 2009.
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