



Scientific publishing

**IMHE 2006 General Conference
11-13 September 2006**

**THEME 3: VALUES, ETHICS AND RESEARCH
Monday 11 September 14h00-15h30**

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Overview and scope

“Scientific publishing” covers:

- **Scientific and scholarly research publishing**
- **STM plus social sciences, humanities, arts**
- **Journals, monographs, reference books, research databases**
- **Academic and professional publishing**

Why is it important?

- **R&D, diffusion and use central to OECD economies**
- **Scientific publishing central to efficiency and costs of R&D and to access and use of knowledge**
- **STM fastest growing media sector in last 15 years (market USD 11 bn in 2008, public companies grew 9% in 2005, profit margins 25%)**
- **Scientific publishing leading in digitalisation and digital delivery – most journals available online, 60% of revenues in electronic products**
- **Balance shifting towards direct access to primary data sources**
- **New pricing and publishing models, IPR challenges, information repository management**

The scientific publishing industry

Publishers:

- **i) Commercial firms; ii) membership societies; iii) institutional publishers**
- **Funding pressures on ii) and iii) making them more commercial**
- **Commercial firms dominate STM market (top 4 about 50% market share) and important in other segments**

Changes taking place:

- **Digitalisation changing workflows and value chains**
- **Increased collaboration along value chains**
- **Changes in product and service possibilities and business models**
- **Scale economies, cross-media ownership and MNE / SME polarisation**
- **Disintermediation: publishers dealing directly with customers**
- **Intermediation: hosted distribution services, open access archives and repositories**

Value chains and business models

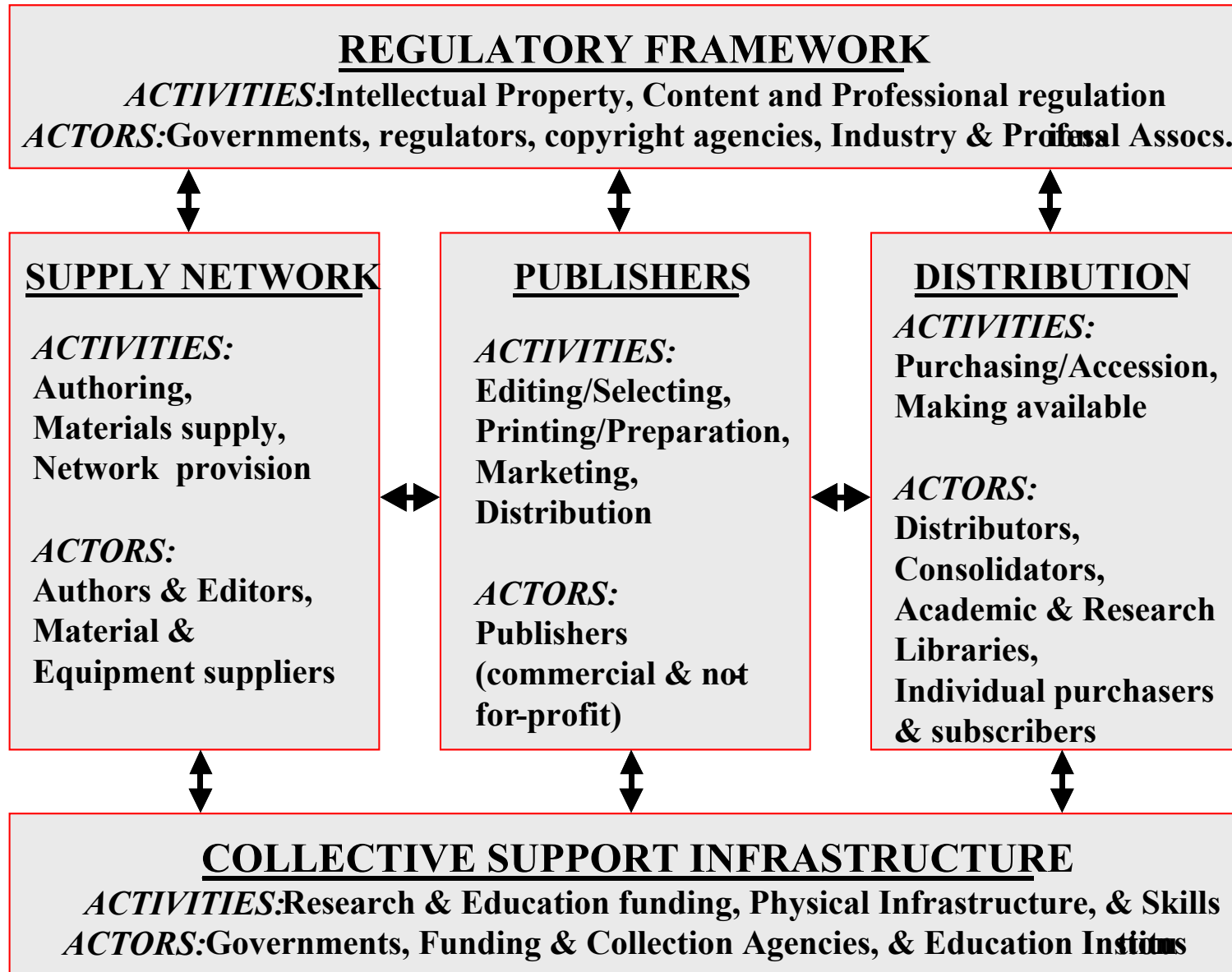
New business models:

- **Bundling subscriptions and site licensing -- subscribers pay to access a bundle of titles (the “Big Deal”)**
- **Open access publishing -- supply-side author or institutional support contribute some / all of publication costs**
- **Open access archives and repositories -- organisations support institutional repositories, subject archives for their communities**

Overall impacts:

- **Changing researcher needs / dealing with increasing masses of data**
- **Emerging opportunities of rapidly developing ICTs and applications in both research and science and in scientific publishing**
- **Unbundling of activities and greater cost transparency**
- **Increased specialisation along value chains**

Scientific communication production system



OCDE

Emerging government and stakeholder issues

- **Research funding.** Public/private funding agencies support: research data, databases, publications. Establish access regimes for publicly funded digital research data (OECD Ministers 2004 Declaration)
- **Research evaluation.** Public/private funding agencies encourage: neutral evaluation across different forms of publishing; measure use of open access archives and repositories; disseminate research results in new media; diversity of public / private information sources
- **Skills.** Public role in basic and advanced ICT education and training; partnerships to develop ICT and related business skills
- **Infrastructure.** Publicly-funded programmes support data bases, archive and preservation initiatives, and legal deposit requirements
- **Information.** High quality, independent information and analysis are crucial (e.g. case studies, research into emerging business models)
- **Technology neutrality.** Remove regulatory barriers and disincentives between digital and other content (e.g. different taxation treatment of print and electronic content to the extent that products are the same)
- **Standards and interoperability.** Frameworks for cross-industry cooperation among standards developers and users: interoperability across systems and platforms; business model development