Scholarly publishing: digital dreams or nightmares?

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The world of scholarly publishing is a complex one. At one end of the scholarly publishing spectrum are the annual multi-million dollar profits of STM global publishers such as Reed Elsevier; at the other the plight of university presses in Australia. Reed Elsevier's half yearly returns, reported on 5 August, indicated a revenue year on year of 2.6 billion pounds and they along with similar big players, such as Thomson International (9.8% per cent STM sales growth in 2003) and Taylor and Francis (17.5% sales growth in2003), take a significant proportion of the recurrent acquisition budgets of Australia's university libraries.

In 2003 a number of Australian university libraries spent over 80% of this budget on serials and standing orders, whereas in the 1980s the proportion had been roughly 50/50 between books and serials. The American Research Libraries (ARL) group has recently indicated that while world production of scholarly publishing is estimated to have doubled since the mid 1980s, the average US research library's book acquisitions have declined by 26% in the USA since that time.

This has come about due to significant annual price rises by multinational publishers, the decline of the Australian dollar in the last two decades and the aggressive marketing of total content packages, particularly through consortia deals to libraries. Some of the latter total more than one million dollars per annum. Hardest hit in the publisher crossfire were the publication sales of smaller learned publishers and monograph purchases. John Dwight, the Executive Chairman of Melbourne's DA Information Services, has recently indicated, however, that there has been an upward trend in monograph purchasing by Australian university libraries in the last eighteen months, in part as a result of the strengthening of the Australian dollar, and in part due to institutional special funding grants.

There is no doubt, however, that the last two decades have seen a very significant decline in the purchase of research monographs. This decline in purchasing has also been reflected in the falling print runs of scholarly books. It has been estimated that the average global sale of a scholarly research book in the social sciences and humanities is now between 350 and 400 copies per title. As the purchases for scholarly books have declined, so have profits for university presses. Universities, moreover, have often unreasonably seen university presses as being self sustaining or generating profits for the university general revenue.

In a vicious cycle the university presses, in order to seek this extra revenue, have often moved into general publishing. This has not always been successful and by so doing they have arguably moved away from the original core business of publishing the academic output of their institution and have thus lost the support of their academic community. According to Dorothy Illing of *The Australian*, scholarly publishing only forms a small part of The University of Queensland Press output with about thirty per cent of the total fifty titles from UQP being in children's literature.

The Australian university publishing scene was reflected by Nick Walker, Director of Australian Scholarly Publishing, on the perhaps appropriate date of Friday 13 August. Walker's keynote address to "The Arts of Publication Symposium" held at the National Museum of Australia in Canberra was entitled "Recent Developments in Australian Academic Publishing". This speech, however, was more 'a look back in anger' rather than a vision for a 'brave new world' for scholarly publishing in the twenty-first century.

Walker began with a *cri de coeur* for the University Queensland Press, which is facing a university review, "to ensure its ongoing viability", and is carrying a deficit of AU$3.5 million. *The Australian* newspaper recently reported under a banner headline, "Publishing jobs go as UQP forced to cut costs", "that the sixteen publishing positions are likely to be declared vacant with staff expected to apply for their jobs or accept redundancy". Walker stated that, not unexpectedly, morale had plummeted at the Press.

Walker identified university press "successes" as the UNSW and UWA Presses. Walker highlighted the closure of university presses in the 1980s but failed to mention the innovative work of CSIRO Publishing, and of the API Network based at Curtin University. Somewhat strangely he neglected to mention the establishment of the new university E-presses such as those at ANU, Monash, Sydney and UTS. These new publishing ventures will discuss strategies at a roundtable discussion, convened by CSIRO Publishing and Monash University ePress on September 8 in Melbourne to which all Australian university publishers have been invited.

Walker was also ambiguous as to the recent refocussing of Melbourne University Publishing indicating that he was not sure "where it was going". The launch of MUP's Academic Monograph series (http://www.mup.unimelb.edu.au/) on 16 August would seem, however, to indicate a clear direction. These are available as both print on demand paperback books or as downloadable PDF files. Louise Adler, CEO of MUP, fascinatingly pondered in a presentation to the Melbourne Writer's Festival on 27 August as to whether publishers were "gatekeepers, content packagers, agenda setters or just clumsy intruders between writers and their readers".

What is a publisher in the digital era? Anyone can be a publisher but of course the paraphernalia of scholarship has still to be assumed even though peer review has come under question recently and citation analysis has become a bureaucratic league table process for both individuals and countries. Institutional repositories of scholarly material have sprung up around the world in universities but Walker also omitted reference to them and their role in the distribution of scholarly knowledge.

In October 2003, the Department of Education Science and Training (DEST) granted AU$12 million to various electronic initiatives, including digital theses promotion and the population of institutional repositories. The funding will allow two consortia, headed by ANU and Monash University, to explore, over the period 2003-2005, the potential of digital publishing technologies linked to global networking and international open access.

ANU E-Prints (http://www.eprints.anu.edu.au/eprints) recorded 209,401 downloads of scholarly material out of 661,116 hits in the first half of 2004 from a base of just

over 2,000 documents. The global Open Access movement, most notably reflected in the July UK House of Commons report, "*Scientific Publications: Free for All*?" (http://www.publications.parliament.uk/pa/cm/cmsctech.htm), has seen significant progress in a number of countries at policy levels ranging from Germany to Canada.

A significant portion of scholarly publishing in the future will no doubt come under the umbrella of "public funding, public knowledge, public access". This will benefit citizens of the first as well as the developing world. Evidence from those publishers who provide material free of charge on the web such as MIT, University of California and Columbia University Presses is that free access to books on the web, actually generates more conventional book sales than would otherwise be the case.

Cornell University Library, with the support of the Mellon Foundation, are developing an open source Digital Publishing System which, it is claimed, will provide "a terrific catalyst for change in scholarly publishing". It is appropriate therefore in January this year the Association of American University Presses (AAUP) and the Association of Research Libraries (ARL) designated it as "the Year of the University Press" recognising the complementary roles of libraries and presses in the scholarly communication system and the need to work together in a period of "economic and technological turbulence".

The motivation of the Vice-Chancellor, Professor Ian Chubb, at The Australian National University to establish the ANU E Press, (http://epress.anu.edu.au), in early 2003 was to provide, in a digital environment, an effective mechanism for the communication of scholarly research conducted within the ANU. Similar motivations underpinned the formation of the Monash University ePress, (www.epress.monash.edu), which will focus on publishing high quality, refereed electronic journals. UTS ePress, (http://epress.lib.uts.edu.au), founded in January 2004, has also a focus on serials, with two online publications to date. The University of Sydney Press (http://www.sup.usyd.edu.au/) incorporates more than 350 electronic texts, via SETIS, (The Scholarly Electronic Text and Image Service) at the University of Sydney Library.

In the electronic press environment print on demand (POD) facilities are crucial. Global research studies have shown that the vast majority of readers do not wish to read extensively online and wish to print off material. Philip Blackwell, CEO of Blackwell UK Ltd, has indicated in a recent interview for the British *Bookseller*, that he sees POD as a key area of potential development for campus bookshops. He stated, "there will be emerging opportunities in the area of print-on-demand. If you go under the heading of student life support then that is a core part of it."

It will be interesting to follow developments such as the recent agreement by the US firm, BookSurge to provide a 'truly global, inventory-free book distribution' facility in Melbourne with the Cambridge Information Group and Mercury Print (www.booksurge.com.au). As an aside, Australian readers who buy from international online booksellers and pay high postal prices would benefit from a local operation that could deliver efficiently in print from an online global provider.

In that context, the future may well see a convergence of electronic publishing between libraries and bookshops, particularly through virtual learning environments.

In several university libraries, bookshops have actually become part of the library, such as at the University of Melbourne In some cases, libraries have introduced coffee shops, making them more resemble the big 24x7 bookstore chains than traditional libraries

With most Australian university libraries opting for electronic access over print wherever possible – 83% of STM journals are available electronically – we are seeing major shifts in user patterns of university libraries. The research community accesses material increasingly at the desktop, while students use physical library environments which more resemble shopping malls. Large banks of computer terminals (Information Commons) in libraries provide one-stop shops to electronic information which will increasingly be customised through personal portals.

The repositioning of the university library in the digital publishing movement will mean changes in the role and function of libraries, for example, in the areas of collaborative research, publication and digital archiving. As a result on the way to changing scholarly communication, libraries may end up changing themselves as well as the future of scholarly publishing?

(This article has not focused on textbook publishing and elearning initiatives which will be the subject of a future article ABP article.)

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