



**Blackwell
Publishing**

**Presentation to CESSE
CEOs**

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“Publishing Will Flourish” But...

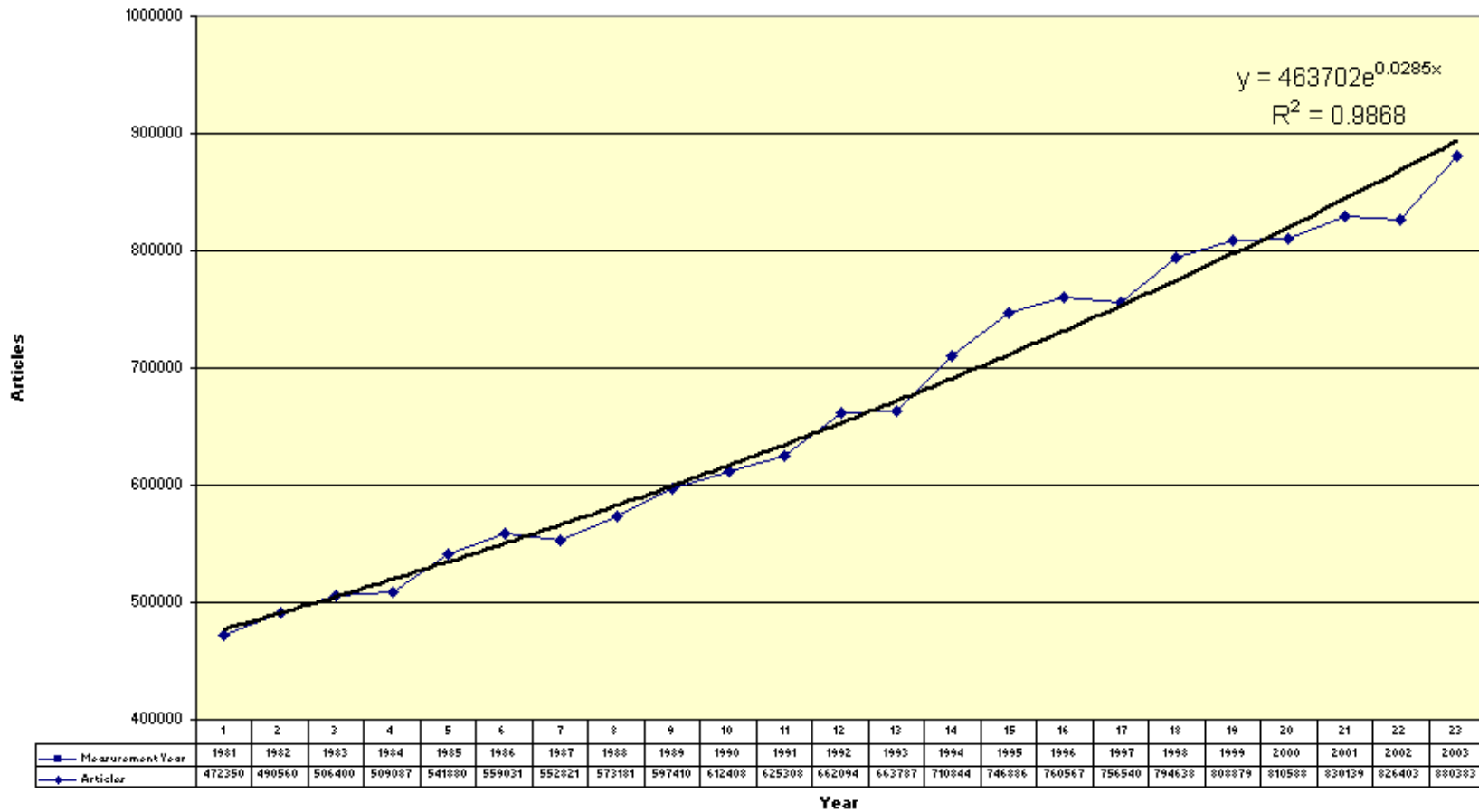
- How will you get the lion’s share of high quality papers?
- If you do, will you be able to make money with them?
 - ‘Open’ Access debates
 - Library funding crisis
 - Cost-per-use reduction expectations
- Strategic planning
 - What is the core-competence of societies?

More research - more papers to publish?

- 3% More papers published every year – for ~200 years
- In 2025, Asia will represent 70% of global HE demand.
 - Chinese Ac. Sci has 30,000 p-g students
 - Every pg must publish 1 paper in English (PhDx2)
 - 50,000 graduate students in 2009
 - Another 32 universities in 'Top Tier' (not CAS)
 - And 95 in Tier 2 – similar requirements?
 - ISI-150,000 papers in 4 years to 2003
 - 123,000 papers in 2 years to 2004
- But how will you get your share of papers?
- And realize the value from them?

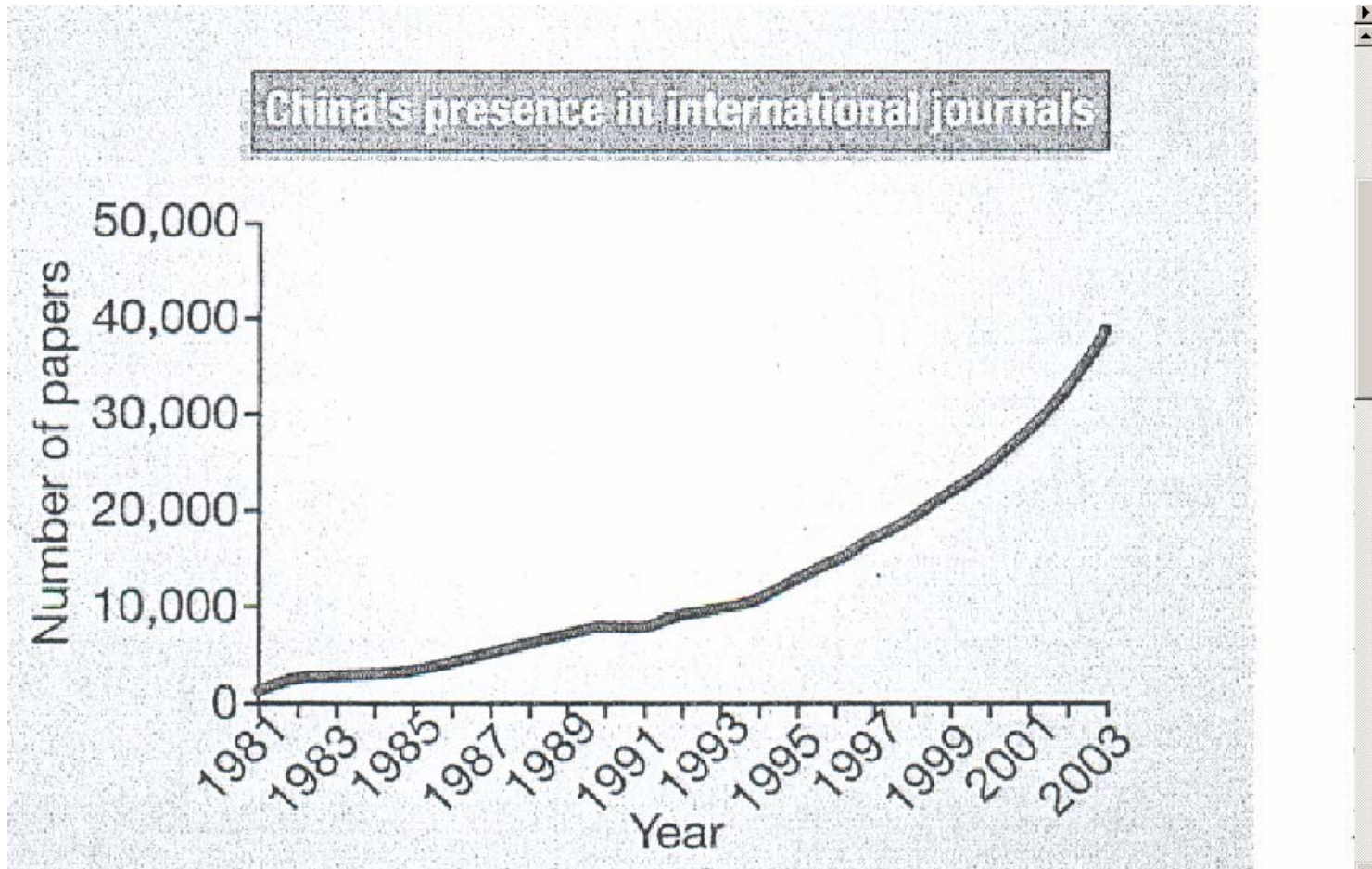


Growth in World Journal Articles 1981-2003



Source: ThomsonISI

Papers Published in ISI Listed Journals





Impact Factor Inflation

All Journals

Range	Science Citation Index				Social Science Citation Index			
	2003		1997		2003		1997	
	No. of titles	%	No. of titles	%	No. of titles	%	No. of titles	%
20 & over	24	0.41%	11	0.22%	0	0.00%	0	0.00%
10 to 19	62	1.05%	39	0.79%	2	0.12%	1	0.06%
5 to 9	178	3.01%	114	2.30%	14	0.82%	9	0.54%
1 to 4	2495	42.24%	1686	33.97%	490	28.59%	314	18.78%
below 1	3148	53.29%	3113	62.72%	1208	70.48%	1348	80.62%
Total	5907	-	4963	-	1714	-	1672	-

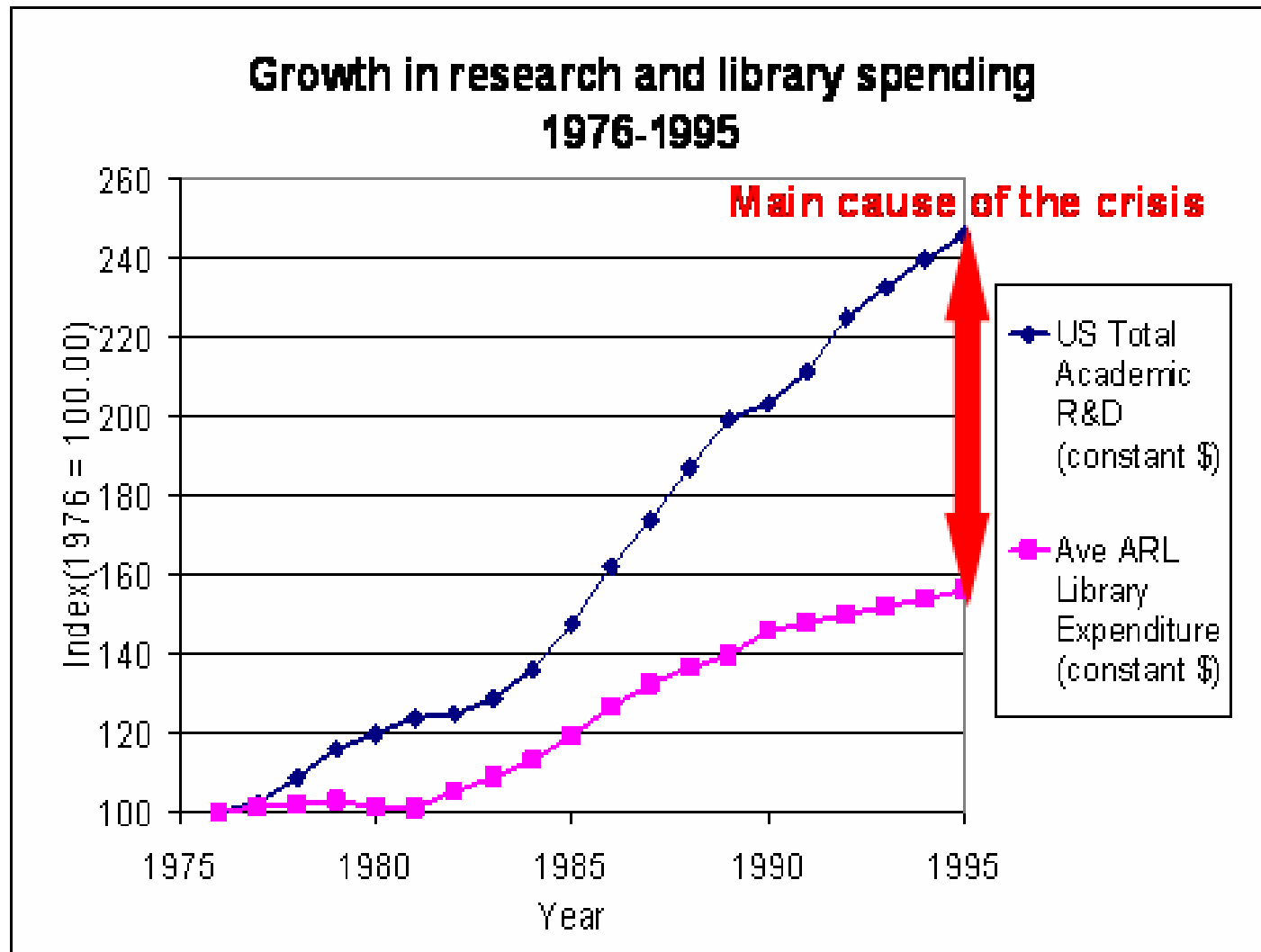
Can value of research papers be realised? (Assuming more are published)

- ‘Open’ Access lobby wants you to give your content away:
 - **Varmus:** “*Our real target is society journals*”

and

- Libraries budgets are tighter and tighter (although usage has gone up and cost-per-use plummeted with ‘The Big Deal’).

The Library Funding Crisis



How can societies respond, and continue to realise publishing value?

- Hold your nerve:
 - Know what's important (and not) re: copyright
 - Offer some stuff, or quite a lot, free – selectively
 - Let authors pay if they want or if funders require
 - Cut costs relentlessly
 - Focus on your core competence....

Strategic planning: What is the core-competence of a society?

- Subject knowledge
- Use it with Strategic Journal Development (SJD) tools:
 - Bibliometric analysis
 - Author analysis
 - Competitor analysis
 - Excellent author, reviewer and reader care
 - etc, etc
- And a sales strategy optimizing libraries & consortia
- To *Increase share* of good authors and readers

How are Society journals different?

Pricing and citation

- Three-quarters (148) of top 200 and two-thirds (345) of top 500 ISI ranked titles are owned by Societies or other non-profits
- Average price per page is lower than non-society equivalents

Summary

- The Strategically Aware Society should dominate the journal publishing in its subject areas. (After all – it is ideally positioned.)
- But, it must continue to offer excellent value
 - and in particular reduce cost-per-use
 - sometimes by partnering for expertise
- And thrive as (research &) publishing flourishes
 - enabling the funding of other activities, that benefit the discipline – and society in general



PS Strategically aware societies can also make money from book publishing

- How many societies make good net profits from book publishing?
- Why not more?
- The risk can be zero – and more societies will realize in the future.