STM and its activities

MPDI Editor-in-chief Online Conference, January 2015
Barbara Kalumenos

What is *stm* ?

- Global representative of scholarly communication community

- Diverse membership
  - not-for-profit, societies, university presses and commercial

- Members responsible for nearly **two-thirds** of all annual article output and **over half** of active peer-reviewed titles

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Why *stm* is important to our industry

- Representing members' interests:
  - to governments
  - to wider industry bodies
- **Informing and influencing decision-makers to produce better outcomes**

- Delivering services:
  - statistics and factsheets
  - conferences, seminars and courses
  - producing statements and reports
- **Supporting members, their interests and the industry**

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Issues facing trade associations

- ## Strategic
  - Lead or follow?
  - Balancing representation/lobbying and service provision
  - Stand firm or be flexible?
  - Harmonizing member positions
  - Finding and building consensus

- ## Tactical
  - Public media outreach
  - Engagement with public, editors, authors
  - Effectiveness vs. efficiency

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stm core roles

- Lobbying, advocacy and representation

- Copyright advocacy and defence

- Public relations and policy

- Education and training

- Standards and technology
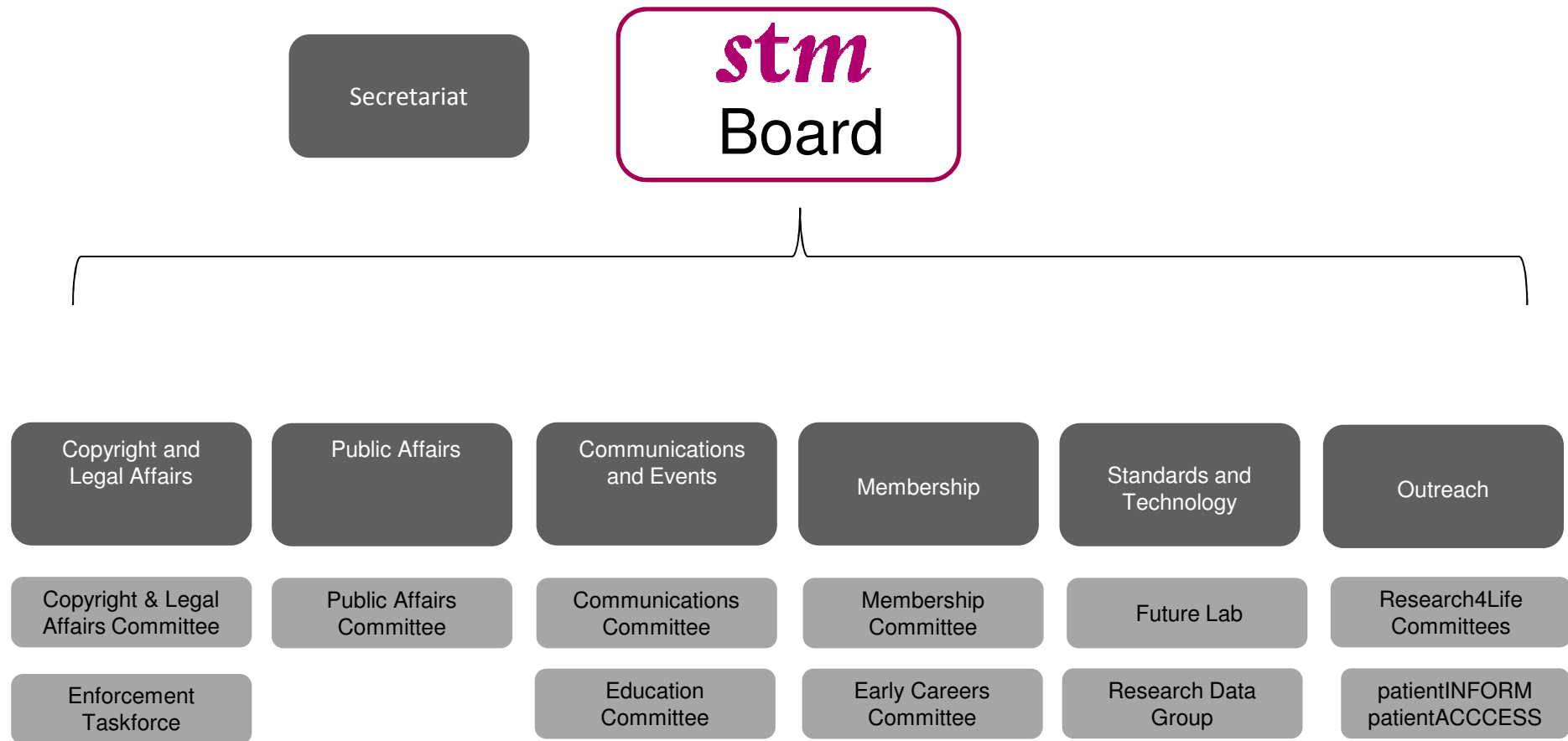
- Industry collaboration

WHAT WE DO

we guarantee

PASSION, COMMITMENT & QUALITY

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Portfolio structure and committees

Secretariat

***stm* Board**

Copyright and Legal Affairs	Public Affairs	Communications and Events	Membership	Standards and Technology	Outreach
Copyright & Legal Affairs Committee	Public Affairs Committee	Communications Committee	Membership Committee	Future Lab	Research4Life Committees
Enforcement Taskforce		Education Committee	Early Careers Committee	Research Data Group	patientINFORM patientACCCESS

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Lobbying activities

- Producing white papers
- Key meetings with politicians, aides, civil and diplomatic servants
- Media messaging (declarations, news releases)
- Engagement with external bodies
- Building alliances with other industry groups:

National Associations
- PSP, PA, NUV, BV

Other Associations
- FEP, IPA, ALPSP, AAUP

International bodies
- IFRRO, WIPO, WTO, OECD, UNESCO

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Copyright advocacy and enforcement

- Advocacy
  - Right rules and right tools
  - Seeking balanced rights and exceptions in public interest

- Enforcement
  - Acta Med
    - Settled with pay-out for litigants
  - Subito
    - Settled with €9m pay-out for litigants, STM Members and publishers in general
  - Document delivery compliance
  - Fighting online piracy

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Public relations and policy

- Statements, factsheets, news releases

- Media interviews, invited talks

- STM website

- Policy and position papers

- Responses to public consultations

- New and rich media, Twitter, video, animation

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Education and training

- Conferences, seminars and courses

- Networking and entertaining

- Career development

- Early Career Publishers Committee

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Staying upfront in technology

- Tech Trends, Innovations seminars
- Webinars, standards development projects

Giving something back

- Research4Life
  - HINARI (13,000 journals, 28,000 books)
  - AGORA (5,200 journals, 4,200 books)
  - OARE (4,400 journals, 14,000 books)
  - ARDI (3,400 journals, 10,800 books)
    - Free or virtually free access to journals for researchers in 116 developing nations
    - Over 9 million full text downloads in 2013
- patientINFORM
  - Public access with expert summaries to key health literature
- patientACCESS

research4life
HINARI · AGORA · OARE

patientINFORM
ACCESS + INTERPRETATION = UNDERSTANDING + EMPOWERMENT

patientACCESS

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Keeping members up to date

- *Membership Matters* newsletter
  - Twice monthly digest of latest developments: split by topic
  - Industry, member, comment, events etc.

- STM Members' website
  - News, facts and figures
  - Document library
  - STM jobs

- Member conferences
  - Annual US Spring Meeting (April)
  - Annual Frankfurt Meeting (October)
  - Innovation, eProduction etc. seminars

Membership Matters
A – March 2014

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Special Report: Academic Publishing in Europe 9 (APE 2014) *'Redefining the scientific record'* was the theme of the main programme at this established annual event.

Copyright high on the agenda in the European Union In the Parliamentary plenary debate before the adoption of the Collective Rights Management Directive on 4 February 2014, Commissioner Barnier announced that the Commission intends to release a White Paper on Copyright by the summer.

European Union – pronouncement on hyperlinking in the *Svensson* **case** The Court of Justice of the European Union has held in the case of Svensson and others v. Retriever Sverige that by providing a link to copyrighted material does not infringe the copyright if the link does not enable a "new" audience to view the copyrighted

- Twitter @stm-assoc

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STM's position on access

- Publishers are committed **to the wide** dissemination of, and unrestricted access to, their content

- We support **any and all sustainable access** models that:-
  - ensure the integrity and permanence of the scholarly record
  - do not constrain scholarly authors or affect the sustainability of the publishing enterprise

- Services that publishers provide **must be paid** for in some way

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STM's position on sustainable access

- STM issued a position on sustainable Open Access; signed by over 45 STM members

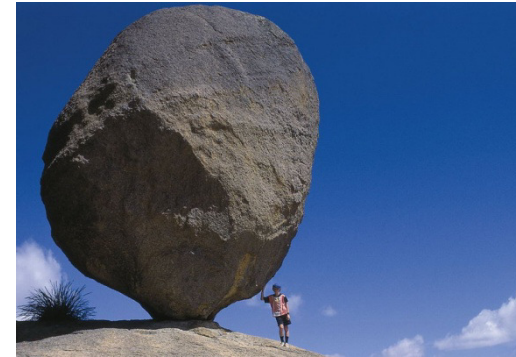http://www.stm-assoc.org/publishers-support-sustainable-open-access/

Publishers are committed to the widest possible dissemination of and access to the content they publish. We support any and all sustainable models of access that ensure the integrity and permanence of the scholarly record. Such options include 'gold' open access, whereby publication is funded by an article publishing charge paid by the author or another sponsor, a subscription-based journal, or any one of a number of hybrid publishing options. Most publishers now offer open access options and publish open access journals, and work closely with funders, institutions and governments to facilitate these developments. Gold open access provides one approach toward our shared goal of expanding access to peer-reviewed scientific works and maximizing the value and reuse of the results of scientific research.

We believe that authors should be able to publish in the journal of their choice, where publication will have the greatest potential to advance their field.   Institutions and funders have a key role to play in ensuring that public access policies allow for funding of peer reviewed publication and publishing services in whatever journal that an author chooses. Publishers look forward to working with all stakeholders to achieve this goal and to advance scholarly communication.

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OA – Future possible challenges

- Double dipping
- Capping of APC's
- Future of Hybrid OA
- (CC) licenses for Green OA
- „Serial Crisis" in the OA environment
- Preservation/Archiving costs for OA articles

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Issues for consideration

- Full OA = gold OA
  - Unclear if economically self-sustaining for journal system
    - Works for some (e.g. Cairo-based Hindawi) but not for others (PLoS Biology & PLoS Medicine not sustainable)
  - Unintended consequences need careful management
    - only some authors get support; how to deal with authors from developing world?
    - Large research intensive organizations bear larger costs
    - Corporate "free riders"
    - (e)reprints in medical sector
  - Researcher funding is limited
    - Government mandated support possible, what happens when money runs out?
- Mandated OA without funding
  - What if policy has a negative impact?
  - Varied impact on revenue streams: subscription, advertisement, etc.
  - Freedom to publish for authors
  - Embargo times

Common ground

- Everyone supports the provision of access to research literature

- Scholarly publications are critical to scientific progress

- Economic pressures on all sectors in the research community

- Governments and funders are essential partners in the research enterprise

- Multi-stakeholder discussions are necessary

  – to develop public/open access solutions,

  – to support an orderly transition and sustainable models

  – to ensure the continued availability of quality research p

How can we help you?