



# The CHARLESTON REPORT

## *Business Insights into the Library Market*

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### Updates from the Charleston Conference

The **40th Annual Charleston Conference** will be held **November 2-6, 2020**. We are taking all developments concerning the coronavirus (Covid-19) seriously and will continue to closely monitor the situation. There are no plans to postpone or cancel the conference at this time.

Although we are hopeful that the crisis will have passed by November, we are committed to creating an online or virtual component of the conference to make it available for those who are unable to join us in person. We are also investigating a fully online event should the need arise.

Our **Call for Preconferences** and **Call for Papers** are now open. Check our website at [www.charlestonlibraryconference.com](http://www.charlestonlibraryconference.com) for details!

### New Dates Announced for Athens 2021

The **22nd Fiesole Retreat** has been moved to **March 30-April 1, 2021**, due to the spread of COVID 19. We extend thanks to our hosts at the **National Library of Greece**, housed in the Stavros Niarchos Foundation Cultural Center <https://www.snfcc.org/en/national-library-greece>, who have graciously agreed to welcome us next year. Please watch for continuing announcements to be posted at <https://www.casalini.it/retreat/>.

### TCR Reports from the Field: Researcher to Reader Conference, London, February 24-25, 2020

*... Reported by Anthony Watkinson, Director,  
Charleston Conference and Principal Consultant, CIBER Research,  
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R2R is a relatively new meeting now owned by the independent consultant Mark Carden, who took it over from the Association of Subscription Agents when they were disbanded. Mark continues the policies of the ASA of bringing together stakeholders in the scholarly communication ecosystem over questions of mutual interest. This spring's meeting drew nearly 200 delegates; roughly half were publishers, with researchers and librarians in attendance as well. The program and slides for presentations are available at <https://r2rconf.com/r2r-conference-programme/>.

#### Opening Keynote

The keynote **“Research Ecosystem Dynamics – Publication Adaptation, Evolution or Extinction,”** was presented by **Dr. Jonathan Adams**, now the chief scientist of the Institute of Scientific Research (ISI). Here are some points made in a fairly dense argument.

1. His thesis was *that we as a group of stakeholders are threatened by climate change which is also assaulting the research system. The movement towards Open is disruptive but so is the investment of new players pre-eminently China.*
2. Globalisation (now sometimes a dirty word) is a significant feature of top science. *U.S. total output continues to rise but this is driven by increased international collaboration. In Western Europe, about two thirds of “national” papers have an international co-author. For leading universities, the collaboration share is higher.*
3. *As well as an acceleration of research, there are movements to control costs by enforcing quality measures since 1992 which are now worldwide and which have led to some (unintended?) consequences. In the UK, there was a shift in engineering and social sciences towards deploying journal articles as evidence. The UK model of research assessment has spread globally because it was seen as effective.*
4. *The ecosystem is under threat from invasion by poor quality (and worse) information. Key actors are complicit in this, including institutions and some countries; many more are compromised, including editors and publishers. Many stakeholders are responsible for upholding research integrity, there is no single group that will fix the problem, there are no knowledge police. Without an adequate defence, the system of research publication that has maintained a validated knowledge corpus so effectively over 350 years will disintegrate.*

Not surprisingly there were some questions.

Is Open Access a good thing? – was a question from an open access publisher. Yes, said Dr. Adams, however “But” was the answer... “there are some parasites.”

Who are the gatekeepers now? – asked a London medical librarian. It used to be the role of publishers and their editors but research managers are important now.

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### Other Presentations on Open Access Models and Impacts

From the Global South, **Dr. Solomon Derese**, from the Department of Chemistry, University of Nairobi, Kenya, explained from his own experience the impact of “**Research4Life and Open Access: Impact on Access to e-Resources in Africa.**” For those not familiar with this programme (<https://www.research4life.org/>), the STM Association (which has been a prime mover in the collaboration since 2002) describe it as... *a public-private partnership between WHO, FAO, UNEP, WIPO, ILO, Cornell and Yale Universities, STM and up to 200 individual publisher partners. Its goal is to reduce the scientific knowledge gap for low and middle-income countries by providing researchers in eligible institutions with free or low-cost access to academic and professional peer-reviewed research journals, books and other resources, as well as helping them to develop the skills required to play an equal role in the research communication ecosystem.*

Dr. Derese was positive. Past African civilisations have been famous for their libraries with Timbuktu only one example. Researchers need access to world scholarship or they cannot contribute. *Africa’s World publication output reached 1% in 1987 but subsequently declined to 0.7% in 1997. WHO survey undertaken in 2000 showed that 56% of institutions in countries with a gross national income per capita (GNIPC) of under US\$1,000 had no current subscription to any international journal.* This is where Research4Life changed the situation. He showed an impressive slide demonstrating a sharp increase in Research Output in R4L Countries since its Introduction in 2002.

It could be argued, but was not on this occasion, that with complete open access no barriers will remain. Derese’s own list of barriers were lack of knowledge of the scheme, the need for more publishers taking part, and lack of access and high cost of access to the Internet. Problems with the cost of APCs were mentioned in the related workshop but not here.

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*The Charleston Report* is written for publishers, vendors, product developers, merchandisers, and wholesalers who are interested in expanding their library market. Readers will gain insights in effective marketing to libraries, early alerts to library trends, access to library leaders’ future plans, library budget projections, library strategic plans, technology directions, and publications needs.

For comments and contributions, contact Rebecca Lenzini, <rlenzini@charlestonco.com>, Editorial Offices, 6180 East Warren Avenue, Denver, CO 80222. TEL: 303-282-9706, FAX: 303-282-9743, (c) Copyright 2020, The Charleston Co. All rights reserved. ISSN 1091-1863.

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**Tasha Mellins-Cohen**, Director of Publishing at the Microbiology Society (the European equivalent of the ASM and once known as the Society for General Microbiology) spoke under the heading of “**Open Access Models for Society Publishers: a Framework for Institutional Publish & Read Deals.**” She has been organising smaller and medium sized learned society publishers mainly in the UK: *The Society Publishers’ Coalition (SocPC) is a group of likeminded, not-for-profit learned societies and membership charities which publish as part of their charitable objectives and which reinvest the surplus from their publishing into the disciplinary communities they serve.*

This presentation, however, was explaining the problems Tasha Mellins-Cohen’s organisation has with Plan S as an exemplar. Sustainability is important and it is not just about money. **How they flip to open access has to be simple and scalable.** The way their discipline relates to others means that SCOAP3, which has enabled subscription models being replaced by open access in the discrete areas of high energy physics and other physics sub-disciplines and with great library support, cannot work for them. They have however managed some consortia deals which enable OA that is not free but for researchers it is free. The link to an article in Insights provided in the presentation does not work but this should do: <https://insights.uksg.org/articles/10.1629/uksg.486/>.

### Hyde Park Debate

The debate centered on a motion “**The Venue of Its Publication Tells Us Nothing Useful about the Quality of a Paper.**” The rules were those popularised at Charleston Conferences in the Hyde Park debates. There were two polls at the start of the

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## Did You Know? ATG Announces New “Rumors Blog”

**Katina Strauch**, Editor of *Against the Grain* and the Founder of the **Charleston Conference**, and her team have just started a new Blog, available now at <https://against-the-grain.com/tag/rumors/>. The new blog updates the eagerly anticipated “Rumors” column which appears in each issue of the print *Against the Grain*. Says Katina: “We want this blog to be a community resource! We invite everyone to not only submit short news items and blurbs about daily life, but also to share how you and your institution/company are reacting to Covid-19 and the other challenges that you face. And of course, please let us know if you have an idea for a guest post or have someone in mind who is making a difference in the world of libraries and publishing that you would like us to interview or feature in some way!”

The Rumors team looks forward to hearing from you! Please use our website **contact us** link to submit your news and ideas.

Write to **Editors of Against Grain** at <editors@against-the-grain.com>.

## TCR Reports from the Field: R2R — from page 2

debate and at the end to see how convincingly the case was made. Under these rules, the motion was won. Among those speaking for the motion was regular Charleston attendee **Toby Green**, former CEO of OECD and now with a new initiative Coherent Digital, and speaking against was **Pippa Smart**, the editor-in-chief of *Learned Publishing*

### Afternoon Presentations

“**Measuring Science Your Way**” was the title chosen by **Dr. Sabine Hossenfelder** of the Frankfurt (Germany) Institute of Advanced Studies. Her argument was that scientists do not like assessment of scientific impact but we cannot do without them. *Researchers as well as those in administration and policy making need a fast, reliable way to quantify scientific relevance. So, they use quantifiers that are readily available which leads to more trouble with measures. They create perverse incentives.* The popular H index is a good example: it encourages too much publishing and it militates against novelty. She then unveiled her own remedy: <https://scimeter.org/>. The site does not help that much. It is a non-profit venture. You design your own metric and apply it to a list of authors: no gaming is possible

Secondly, **Dr. Laura Fogg-Rogers** from the University of the West of England spoke about “**Catch 22 – Women Peer Reviewers.**” Her thesis was that there is *a significant under-representation of women in STM research which is damaging societal progress for democratic, utilitarian and equity reasons.* There was plenty of evidence offered – for example a Nature paper which showed that all male review panels rejected more submissions with female last authors than all female panels. The equivalent of blind auditions now common in orchestra selections was an answer but there was a basic unconscious structural bias, the remedies for which need to be covered in guidance for peer review. In the questions, the previous speaker did not think most women would be happy with open peer review.

### Highlights from Day Two

The second day began with a panel on “**Research Metrics**” which was mainly a UK concern though some of the points made were relevant worldwide. The speakers were Sage publisher **Caroline Porter**, who served as convener, along with **Euan Adie**, formerly of *altmetrics.com*, **David Carr** of the Wellcome Trust, and **Professor James Wilsdon** of Sheffield, currently Digital Science Professor of Research Policy, Department of Politics and Director, Research on Research Institute (RoRI). There was some discussion about assessment of funders themselves. Carr told us that Wellcome, often in the lead as a funder, were now forcefully guiding the institutions that they fund to really commit to approved policies such as DORA – judging by the article and not the journal the article is published in. It was agreed that incentives were important but difficult to align across national boundaries. The question was raised about lack of consultations with disciplinary representative bodies among the funder world before rather than after they mandated new policies.

Two expert presentations by publishers followed – on “**Reproducibility and Reusability.**” Both can be accessed from the R2R site and are worth studying. **Catriona Fennell** who directs publishing services at Elsevier spoke on “**Applying the Reproducibility Manifesto.**” The challenges were many.

Incentives are needed for researchers and more rigour needed in methods and statistics. It is difficult to validate reproducibility in peer review. **Rebecca Grant** of Springer Nature’s presentation was entitled “**From Data Policy Towards FAIR Data For All: How Standardised Data Policies Can Improve Sharing.**” The emphasis was very much on benefits to researchers and the increase in numbers actually sharing. Almost all major publishers have endorsed FAIR. The current emphasis is having good policies (guidance) but Grant thinks that mandates are on their way.

### Artificial Intelligence

The original speaker on “**Artificial Intelligence in Scholarly Information: a Guide to the Current Landscape**” was **Jim Longo** but he is no longer with HighWire and a colleague **Olly Rickard** gave a skeleton presentation ending with the summary: *AI doesn’t replace humans; it deals with the huge scale and leaves the clever bit to us.* **Michael Upshall** of UNSILO did give his presentation as expected: “**Why Has the Take-up of AI Been so Limited in the Academic Work Flow**” was the question. The answer helpfully began with some sensible definitions and some explanatory graphics. *Scholarly publishing needs a scalable solution.*

### Take-Aways from the Summary

**Mark Allin**, former president and CEO of Wiley, provided a magisterial summary. The conference has produced a lot and there had been a lot of consensus.

*There are reasons to be concerned:*

- The Ecosystem is under threat and Measurements are inadequate;
- Women are under-represented in STEM research;
- Peer review is broken and Journals do not matter.

*There are, however, reasons to be optimistic:*

- There are new models for learned societies;
- Research for life is strengthening research in the Global South;
- There is an agenda for greater diversity and transparency;
- Technology can enable better peer review, measurement, data sharing and improve reproducibility and journals still matter.

Among the main themes are how robust, transparent and fair is the scholarly communications process? Are the key players aligned? On Impact – how to define, measure and maximize as a public good? And as far as Talent is concerned: how can global, female and early career researchers be better supported?

### Closing Keynote Postscript

Finally, there was a keynote postscript from semi-retired **Richard Charkin**, former OUP academic publisher and the founder of Bloomsbury Academic, which nicely complemented the Adams keynote which began the meeting. He had similar concerns but his context was different. The question posed: “**Is Unfettered Open Access an Unfettered Opportunity or a Threat?**”

*Ed Note: Anthony’s report is also available at [https://against-the-grain.com/2020/03/atg-original-researcher-to-reader-conference-london-24-25-february-2020-report/?utm\\_source=rss&utm\\_medium=rss&utm\\_campaign=atg-original-researcher-to-reader-conference-london-24-25-february-2020-report](https://against-the-grain.com/2020/03/atg-original-researcher-to-reader-conference-london-24-25-february-2020-report/?utm_source=rss&utm_medium=rss&utm_campaign=atg-original-researcher-to-reader-conference-london-24-25-february-2020-report).*

## Don't Miss This!

*The Charleston Advisor's* April 2020 issue (v.21, no.4) is now available in print and online at [www.charlestonco.com](http://www.charlestonco.com). Included in the current issue are the following reviews:

### Comparative Review

- Scopus CiteScore (Elsevier) and Clarivate Journal Citation Reports (Clarivate Analytics)

### Standard Reviews

- Bloomberg Professional Service (Bloomberg LP)
- Colonial America Revisited (Adam Matthew)
- Films on Demand Master Academic Video Collection (Infobase)
- Gender: Identity and Social Change (Adam Matthew Digital)

- Mason OER Metafinder (George Mason University)
- Sex & Sexuality Module I: Research Collections from the Kinsey Institute Library & Special Collections (Adam Matthew Digital)
- Social Science Premium Collection (ProQuest)
- Social Work Reference Center (EBSCO Information Services)
- Territorial Papers of the United States, 1764-1953 (Readex/Newsbank)

**Don't forget!** Reviews from this issue as well as over 500 updated reviews from past issues are now available in the ccAdvisor database, a joint project of Choice and *The Charleston Advisor* now offered through EBSCO.

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