

Against the Grain

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The Scholarly Publishing Scene — The Age of Acquiring

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A recent company acquisition that caught my eye, and no doubt many other eyes, was **Elsevier's** latest purchase. The acquired company was **Aries Systems**, founded by **Lyndon S. Holmes** and **Sandra Holmes** in 1986 and located in the Boston suburbs. **Aries** provides publishers an online manuscript submission and peer-review system — workflow tools that publishers can provide to authors and journal editorial boards — as well as a digital rights management solution.

I learned about the acquisition from the venerable **Kent Anderson's** well-reported and comprehensive *Scholarly Kitchen* blog post on August 6 (“Interpreting Elsevier’s Acquisition of Aries Systems.”) and another insightful post on the same day by **Angela Cochran**, associate publisher and journals director at the **American Society of Civil Engineers**, (“Clowns to the Left of Me ... Jokers to the Right: The Independent Publisher in an Age of Mergers and Acquisitions.”). These posts thoroughly discuss increasing consolidation within scholarly publishing’s commercial sector and **Elsevier's** strategic aims — as well as those of its competitor, **Wiley**, which, a couple of years ago, acquired **Atypon**, a provider of an online publishing platform and web development tools to publishers — for improving the journals publishing process. They also discuss, among other topics, the necessity for maintaining firewalls in these acquired companies, which serve multiple publishers, so that other publishers remain confident that **Elsevier** and **Wiley** cannot gain access to their materials.

Other than my view that **Elsevier** and **Wiley** have been willing to make substantial investments to protect their lucrative subscription-based journals businesses — not to do so would amount to business malpractice — there’s little need for me to weigh in at length, or report extensively on other opinions from industry watchers and insiders on the important topics that the two blog posts eloquently address. If you’re interested in what these acquisitions might mean for the future of scholarly publishing and haven’t yet read the posts, I urge you to read them.

Instead of ruminating on the two acquisitions, I looked for other information about how scholarly publishing’s commercial sector has changed in the past decade or so.

For one thing, if you peruse the member roster of the **International Association of STM Publishers**, the list of commercial publishers that include journals in their portfolios, which excludes STM member **McGraw-Hill**, isn’t very long. Besides **Elsevier** and **Wiley**, there are **De Gruyter**, **Emerald Publishing**, **Karger Publishers**, **Qingres** (a company based in China and the U.S. that, unfortunately, made **Beall's** list of predatory publishers), **Sage**, **Springer Nature**, **Taylor & Francis**, **Thieme Publishing Group**, and

Wolters Kluwer. (And besides several major university presses, such as **Cambridge** and **Oxford**, and numerous technical societies, much of STM’s membership now includes companies that provide technical and consulting services to publishers.)

A major reason the list of commercial STM member publishers is so short nowadays is, of course, that some larger publishers have been gobbling up smaller houses. OK, it might be more fair in the case of **Wiley**, say, to use the term “merger,” inasmuch as in the last six decades **Wiley** has “merged” with **Interscience**, **VCH**, and **Blackwell**. And, as discussed above, several STM member commercial publishers have also been gobbling up companies that provide technical services to publishers, as well as to researchers and authors. In any event, a quick way to view some of the results of this devouring is to consult the invaluable website, **crunchbase.com**. (Their motto is “discover innovative companies and the people behind them.”)

Now I didn’t opt for the \$29 monthly fee when I looked at **crunchbase**, so while I could see how many acquisitions **crunchbase** says a publisher has made, I can’t see the total time frame the website uses, nor can I see its assessment of what overall strategy a corporation’s list of acquisitions might indicate. Nevertheless, without entering into a subscription deal, I could see as many as 15 acquisitions. So there’s enough to talk about, it seems to me.

It’s the case, for example, that while **Elsevier** and **Wiley** have added to their publishing portfolios with acquisitions of, and mergers with, other publishers (the major portfolios that **Elsevier** has acquired over the years include **North Holland**, **Butterworth-Heinemann**, **Pergamon**, and **Academic Press**) they stand out from other large STM commercial publishers in their aforementioned acquisitions of companies like **Aries** and **Atypon**. The **Taylor & Francis Group**, a major STM journal publisher, has made numerous acquisitions of other commercial STM publishers, such as **CRC Press** and **Marcel Dekker** (looking at the acquisitions is a trip down memory lane for me), and probably relies on the services of either **Aries** or **Atypon**, or both, but hasn’t bought the expertise and systems these technology companies provide. Nor has **Wolters Kluwer**, the most active among commercial STM publishers in terms of the total number of companies it has acquired. I see on **Kluwer's** acquisitions list a focus on adding software that their medical-prac-

itioner customers use in their daily work, in addition to book publishing programs. It makes sense, of course, for a publisher to acquire software-development expertise, rather than try to hire developers and put them to

work in-house on projects the publisher has no experience with. Similarly, as **Angela Cochran** points out in her *Scholarly Kitchen* post about **Atypon** and **Aries**, “these systems are much harder to build than most of us think,” so the idea of replicating *that work* in-house should also be a non-starter for publishers.

As for the rest of the major commercial STM publishers, they’ve been much less active in making acquisitions than **Elsevier**, **Wiley**, **Taylor & Francis**, and **Wolters Kluwer**. **Thieme** and **De Gruyter**, according to **crunchbase**, haven’t made any acquisitions, and **Springer Nature**, **Sage**, **Karger**, and **Emerald** have been minimally active. As for these STM houses, **crunchbase** reports that **Springer Nature**, the product of a merger itself, has acquired only **iversity**, a Germany-based learning platform that partners with institutions to provide online courses to students, **Sage** has acquired only **Talis**, which provides technology and data in the education sector, **Karger** has acquired only **Health Press, Limited**, an information service for the medical community, and **Emerald** only **Pier Professional Limited**, a UK publisher of health and social care journals. So consolidation is concentrated mainly in just the aforementioned four large commercial STM publishing houses.

There is one other important aspect of the current state of manuscript submission and tracking systems that I want to mention. I focus on it as a result of my recent profanity laden experience with an invoicing system that a publisher to whom I submitted an encyclopedia article uses. **Kent Anderson** points out in his *Scholarly Kitchen* blog post that academics, who, like the rest of us, have been spoiled by the “superbly designed interfaces of **Amazon**, **Netflix** and **Google**,” find that publishing systems “aren’t as smooth and sophisticated as most of the rest of their online experiences. Manuscript systems are perceived as uncaring, unforgiving, and ungainly by most users.” It sounds like **Elsevier** and **Wiley** still have a lot of technical and PR work to oversee. 🍄

