

**UMD PACT Position Paper:
Journal Subscriptions, “Big Deals,” and Achieving Sustainable
and Equitable Access to Scholarly Information**

July 16, 2021

Key Takeaways

- Bundled journal subscriptions with commercial publishers, known as “Big Deals,” can provide benefits, but UMD PACT members believe these agreements are increasingly undesirable and unsustainable for UMD.
- “Transformative agreements” advance the goal of increased open-access publishing, but often combine bundled access to a publisher’s corpus of titles with a form of payment system to subsidize Article Processing Charges (APCs). UMD PACT members believe this approach is also unsustainable for UMD and will continue to exacerbate inequities in open-access publishing.
- UMD PACT members strongly support “green” open access methods and turning to sustainable, shared open infrastructure as viable methods to change the scholarly communication ecosystem.
- PACT members recognize that researchers’ publishing needs vary by discipline and that maintaining a flexible and diverse array of sustainable scholarly publishing options is paramount.

Full Statement

As members of the cross-campus [UMD PACT](#) (Publishing, Access, and Contract Terms) working group, we look forward to our continuing discussions with the UMD community about the proposed campus policy, “Equitable Access to Scholarly Articles Authored by UMD Faculty,” during the 2021-2022 academic year. We think our conversations to date have enhanced awareness about the benefits of open access and open science; expanded our knowledge about faculty members’ publishing practices and concerns; and increased understanding about the unsustainable business models and inequities that affect academia’s current scholarly publishing ecosystem.

In addition to advocating for changes in UMD’s scholarly communication policies and practices, we have examined the current state of UMD’s bundled journal subscriptions with commercial publishers, known as “Big Deals,” and the new models being used to increase open access and counter the exorbitant cost increases and for-profit monopolization occurring in the academic publishing industry. One alternative approach to the traditional subscribe-to-read model is the “transformative agreement.” Although there are many types of transformative agreements, most of them try to increase open-access publishing by shifting from a system of paying primarily for subscription-based reading to using at least some of this funding to subsidize open-access publishing fees paid by authors, otherwise known as Article Processing Charges (APCs).

UMD PACT made a foundational step toward ensuring fairer, more transparent licensing agreements via the Libraries' adoption of new core [licensing principles](#) in 2021, but we now wish to advance the following additional points about Big Deals and transformative agreements.

Big Deals can provide benefits such as enhanced discovery of content and access to a larger number of online journals, but they also come with significant downsides. Negative aspects of Big Deals include their increasingly expensive annual costs and the high inflation rates associated with maintaining them, even though a significant number of the bundled titles receive little to no use. The prices paid for Big Deals perpetuate a for-profit system of inequitable access to scholarly information as well, where much of UMD's valuable research knowledge is kept behind paywalls and permission barriers. Big Deals also reduce the University's flexibility when they are tied to multiple-year contracts. This inflexibility is especially risky when viewed in light of the UMD Libraries' declining collections base budget, which also was affected by a permanent 5% reduction in 2021 because of the COVID-19 crisis.

Some institutions have used transformative agreements to advance the goal of increased open-access publishing, but they have done so by keeping their Big Deals with commercial publishers intact. These agreements often combine bundled access to a publisher's corpus of titles with a form of payment system to subsidize APCs. When the subsidies are exhausted, the APCs must, once again, either be paid by authors or their disciplinary departments, or paid in some cases by the author's institution, the library, or with grant funds. This approach is unsustainable, in our view. The costs for Big Deals are already unaffordable for publicly funded institutions like UMD and continue to be undesirable in most cases, because the continued support of monopolistic publishing exacerbates inequities in open-access publishing and favors elite or better-funded institutions and researchers at the expense of others.

For these reasons, we wish to state our strong support for green open access and turning to sustainable, shared open infrastructure as more viable methods to change the scholarly communication ecosystem. Green open access is achieved through the sharing of peer-reviewed preprints and post-print manuscripts through authors' self-archiving of content in repositories like [UMD DRUM](#) and [SocArXiv](#), and can also include new methods such as overlay journals or superjournals that will provide access to freely available content in new, curated formats. Our proposed "Equitable Access" policy will facilitate green open access at UMD, but is compatible with continued use of toll access publishing when authors choose this option.

We recognize that researchers' needs vary by discipline and material type, and that maintaining a flexible and diverse array of sustainable scholarly publishing options is paramount. No one solution will be a panacea; all bring benefits and pitfalls. However, Big Deals, as they are modeled now, cannot be maintained for long within the Libraries' budgetary constraints. Library colleagues, acting on the University's behalf, have already broken up UMD's Big Deal with Taylor & Francis, for example, after taking these factors into consideration and working to ensure alternative means of access through interlibrary loan and other mechanisms.

We, therefore, support library colleagues and their need to collaborate with stakeholders to analyze UMD's remaining Big Deal agreements. When deemed strategic and necessary, we

agree with replacing Big Deals with curated collections of individual journals and more just-in-time content in support of the curriculum and research enterprise of the University of Maryland.

Respectfully signed by,

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