

Executive Summary

Academic publishing is undergoing a major transition as some of its leaders are moving from a content-provision to a data analytics business. This is evidenced by a change in the product mix that they are selling across higher education (higher ed) institutions by adding research assessment systems, productivity tools, online learning management systems – complex infrastructure that is critical to conducting the end-to-end business of the university – to journals and textbooks.

Through the seamless provision of these services, these companies can invisibly and strategically influence, and perhaps exert control, over key university decisions – ranging from student assessment to research integrity to financial planning. Data about students, faculty, research outputs, institutional productivity, and more has, potentially, enormous competitive value. It represents a potential multi-billion-dollar market (perhaps multi-trillion, when the value of intellectual property is factored in), but it could significantly reduce institutions' and scholars' rights to their data and related intellectual property. A set of companies is moving aggressively to capitalize on it, often by exploiting the decentralized nature of academic institutions.

This shift is still in its early days. There are actions and strategies that institutions can consider adopting, both individually and collectively, to mitigate the potential risks posed by this trend, and to leverage potential benefits. These range from simple risk mitigation actions – such as revising existing data policies, establishing coordination mechanisms, negotiating to ensure institutional ownership of the data and infrastructure and establishing open terms and conditions – to larger, more strategic actions like re-thinking the institution's relationship to its data in terms of commercial exploitation, IP ownership, and research investment outcomes.

This document is designed to provide higher education leaders with an analysis of the leading commercial players' strategies in this domain, the implications of those strategies, and a preliminary set of possible broad-stroke strategies that higher education institutions might consider taking to secure outcomes consistent with their own values and goals.



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SPARC.

For decades SPARC has catalyzed an open system for research and education on behalf of 240+ libraries in the U.S. and Canada, with sister organizations in Europe, Africa and Japan.



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