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Concentration of academic book publishers¹

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Introduction

Books play an important role in scholarly communication in the social sciences and humanities (Engels, Ossenblok, & Spruyt, 2012; Nederhof, Van Leeuwen, & van Raan, 2010; Piro, Aksnes, & Rorstad, 2013). This implies that academic book publishers play an important role in the SSH, by soliciting manuscripts ('listbuilding', Parsons, 1990), selecting authors and manuscripts, organizing peer review procedures for book contributions, or initiating new book series on unexplored topics. In this paper, we examine the extent to which academic books in Flanders, Belgium are concentrated in terms of their publishers.

It has been argued that there is an oligopoly of five academic publishers that together control over 50% of academic journals (Larivière, Haustein, & Mongeon, 2015) in the natural and medical sciences (NMS) as well as in the social sciences and humanities (SSH). The analysis by Larivière and colleagues is based on the Web of Science journal indexes – SCI, SSCI, and AHCI –, which indeed provide fair coverage of most of the NMS. As for SSH, however, the coverage of WoS is lower. Among other reasons, WoS covers local and regional publication outlets to only a limited extent and several SSH disciplines publish a significant proportion of their output in other publication types, most notably books. It is, hence, an open question if a similar concentration exists for (books in) the SSH.

Studying the feasibility of a more comprehensive coverage of the SSH in a citation index, Sivertsen and Larsen (2012) investigate the concentration of publication channels in the SSH. They find that, based on Norwegian data from 2005–2009, "book publishing is more concentrated in a few channels than journal publishing." It is worth noting, however, that their analysis of journals also takes domestic journals into account and hence cannot be directly compared to the findings of Larivière et al. (2015).

Mannana-Rodríguez and Giménez-Toledo (2018) analyse the topic of publisher specialization and multidisciplinary from an 'internal' perspective, by analysing the disciplinary diversity (number of disciplines) and concentration (Gini index of books by discipline) of each publisher's portfolio. In this paper we take an 'external' perspective by which we consider all books in a population and investigate how evenly they are distributed over publishers. Zuccala, Guns, Cornacchia, & Bod (2015) have observed that many academic publishers, especially smaller and local ones, seem to specialize in specific disciplines or even specific

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topics. Along similar lines, we investigate the distribution of publishers over the whole data set as well as for individual SSH disciplines.

Data and methods

The data set used derives from the set of book publications submitted for inclusion in the VABB-SHW database. The VABB-SHW is a database of publications authored by researchers affiliated to an SSH unit of a Flemish university. It currently covers the years 2000–2015 and includes journal articles, monographs, edited books, book chapters, and proceedings. The number of publications per university in the database (over a period of 10 years and weighted according to publication type) is one of the parameters in the regional performance-based research funding system. For further details on the objectives and working of the VABB-SHW we refer to Verleysen, Ghesquière, and Engels (2014).

Book publications can be classified as peer-reviewed, and hence included in the VABB-SHW, in multiple ways. First, one of the tasks of the Authoritative Panel – a panel of senior SSH scholars charged with upholding the academic standards of the VABB-SHW – is to compile a yearly list of publishers that employ peer review and whose books are thereby eligible for inclusion in the VABB-SHW (see <https://www.ecoom.be/en/services/vabb>). A book's publisher is identified by the prefix of the ISBN (in technical terms, the combination of prefix element, registration group element and registrant element, e.g., 978-94-012). Second, books in book series that have been approved by the Panel are included. Finally, individual books that are considered peer-reviewed can be included, either via the Guaranteed Peer Reviewed Content label (GPRC; see Verleysen & Engels, 2013) or through the appeals procedure.

The data set used for the present analysis is obtained as follows. First, we consider all book publications (monographs, edited books, and chapters in edited books) published between 2000 and 2015, and submitted for inclusion in the VABB-SHW, yielding a set of 70,393 publications. Since adequate metadata is a prerequisite, we leave out all publication records for which one of the following applies: no ISBN is supplied (N=14,295); the ISBN is invalid (N=18); the publisher associated with the ISBN prefix could not be retrieved (N=154); or more than one publisher is associated with the record (N=190). This step results in a set of 55,736 publications. Since each book chapter constitutes a separate publication, one book can occur multiple times in this data set. The number of individual books equals 26,896. Of these, 7,780 (29%) are considered to be peer-reviewed and therefore included in the performance-based research funding system, whereas 19,166 are considered not peer-reviewed.

We take the book as unit of analysis; multiple publications (e.g., chapters) with the same ISBN are considered to be the same book. The yearly number of books is summarized in Table 1. The decrease in 2015 is due to the fact that about 20% of publications from the last year is not submitted in time and is added in the next edition.

Table 1. Number of books per year

Year	Books (N)
2000	756
2001	833
2002	946
2003	939
2004	1144
2005	1127
2006	1428

2007	1944
2008	2151
2009	2148
2010	2319
2011	2254
2012	2273
2013	2359
2014	2310
2015	1965

One of the crucial factors in concentration of publishing houses is the fact that the publishing market is highly dynamic: mergers and acquisitions are frequent, and large publishers typically have a variety of imprints for specific markets. We therefore assign a publisher name to each combination of ISBN prefix and year. Taking the standardized names that are already recorded in VABB-SHW as a starting point, we focus on those prefixes and publishers with the highest number of publications. Sources for this exercise include overviews of acquisitions and imprints (Harry Ransom Center & University of Reading Library, 2006; Munroe, 2007; STM, 2016) as well as the websites of publishers and imprints.

We gauge concentration in two ways. First, the Gini inequality index (Gini, 1921) is used to summarize the concentration in one number. The Gini index ranges from 0 – all publishers have the same number of books – to (in the limit) 1 – one publisher has all books. It is equal to twice the area between the Lorenz curve and the diagonal (Rousseau, 2011). In calculating the Gini index, we do not take into account publishers with zero books, because it is practically impossible to account for all publishers that have not published a book in the data set. Second, we also report the top N publishers (here, N=10) with their percentage to get a better indication of the share of the top contributing sources.

Results are presented at the aggregate level of the entire data set, per publication year, and by discipline. For this, we use a cognitive classification based on the OECD Fields Of Science (see Guns, Sīle, Eykens, Verleysen, & Engels, 2018 for details). This classification is available for all peer-reviewed books and for 11,628 non-peer-reviewed books (60.8% of all non-peer-reviewed books). The unclassified non-peer-reviewed books are not taken into account in the disciplinary analysis.

Results

First, we look at how concentration has evolved over the course of years. We hypothesize that, due to mergers and acquisitions, the concentration of publishers has increased. Figure 1 confirms this hypothesis, with the Gini index climbing from 0.52 to over 0.66. We observe a clear difference between peer-reviewed and non-peer-reviewed books. The peer-reviewed books are more concentrated throughout the whole time period and exhibit a linear increase of the Gini index. The Gini index for non-peer-reviewed books increases until 2010 and decreases afterwards. The increased concentration found for the peer-reviewed books coupled with the fact that the number of publishers on the list has increased very little suggests that a small number of publishers are chosen very often.

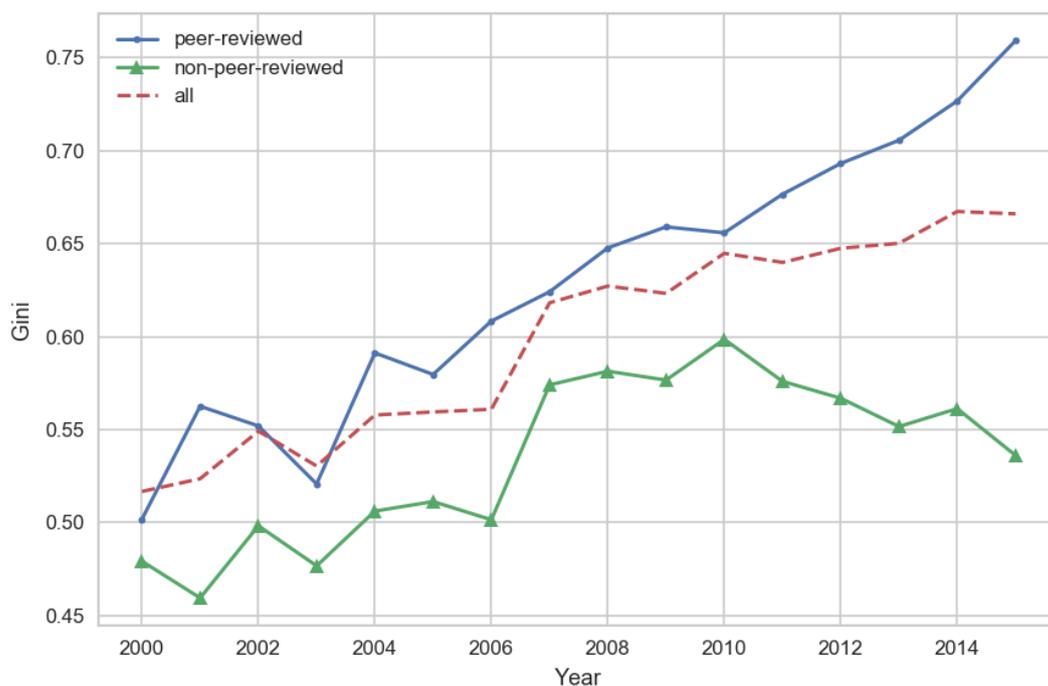


Figure 1. Evolution of concentration of book publishers

Table 2 lists the 10 publishers with the largest share of books in the whole data set. Together they account for 28.7% of all books. Remarkably, 7 out of 10 are local publishers. Of the three non-local publishers, Springer is the only one that is in its entirety on the VABB-SHW publisher list. Several imprints of Wolters Kluwer and Informa, which is probably best known as the parent company of Taylor & Francis, are also included on the publisher list. Of the Flemish publishers listed in Table 2, only Peeters is on the list. The last column indicates if at least one book of a publisher is indexed in the Book Citation Index (BkCI). With the exception of Academia Press, none of the local publishers have books that are indexed in the BkCI.

Table 2. Top 10 of publishers with largest shares of books in data set

Publisher	Books (%)	Books (% cumulative)	Flemish publisher?	In BkCI
Acco	3.7	3.7	Yes	No
Springer	3.4	7.2	No	Yes
Wolters Kluwer	3.3	10.4	No	Yes
Informa	3.2	13.7	No	No
Die Keure	3.0	16.6	Yes	No
Maklu	3.0	19.6	Yes	No
Intersentia	2.8	22.4	Yes	No
Academia Press	2.4	24.8	Yes	Yes
Larcier	2.0	26.9	Yes	No
Peeters	1.8	28.7	Yes	No

Now we turn to the question to what extent differences can be found between disciplines. Figure 2 provides an overview of SSH disciplines; three disciplines with less than 100 books (Archaeology, Social and economic geography, and Other humanities) are omitted.

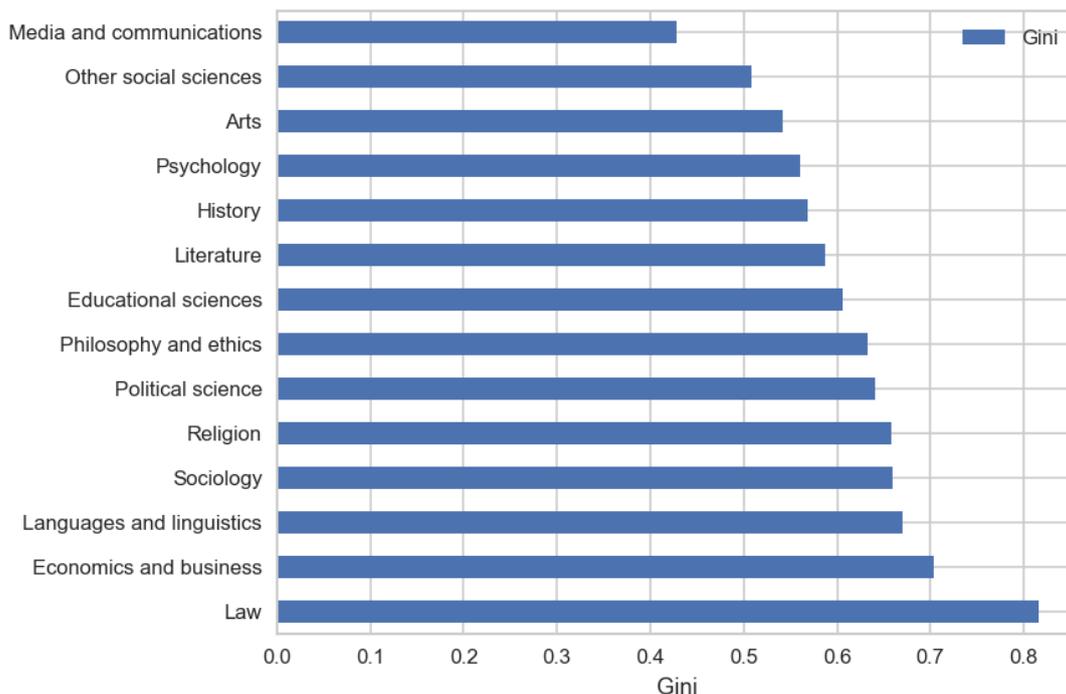


Figure 2. Concentration by SSH discipline

We find large differences between disciplines in terms of concentration. Moreover, when considering the most important publishers per discipline, disciplinary preferences for some publishers are clear. While it is impossible to present results for every single discipline, Table 3 shows the top 10 publishers for three disciplines. Law is very concentrated, with 57.5% of all books published by the ten publishers listed. The top 10 of Psychology is also responsible for more than half (51.3%) of the books. While the overall concentration of Literature (as measured by Gini) is higher than that of Psychology, the ten most frequent publishers only account for 25.3% of Literature books.

No publisher occurs in the top 10 of each of these three disciplines. Most of the publishers listed for Psychology are large international publishers with a broad, multidisciplinary portfolio. This is quite different for Law, where (local) publishers like Intersentia and Larcier have a clear specialization in the discipline of law. In the case of Literature, we find several publishers that focus on the humanities. In spite of being acquired by Brill in 2014, Rodopi is the publisher with the largest amount of books in this discipline.

Table 3. Top 10 publishers for 3 SSH disciplines

Law		Literature		Psychology	
Publisher	%	Publisher	%	Publisher	%
Intersentia	12.2	Rodopi	4.6	Informa	12.5
Die Keure	8.9	Peter Lang	4.0	Nova	8.5
Wolters Kluwer	8.6	Peeters	3.4	Springer	7.0
Larcier	6.3	Academia Press	2.7	Oxford University Press	5.5
Maklu	5.9	Brill	2.4	Cambridge University Press	5.5
Bruylant	4.9	De Gruyter	2.1	Wiley	4.0

Oxford University Press	2.9	Leuven University Press	1.9	Sage	3.0
Springer	2.8	Cambridge University Press	1.5	Lawrence Erlbaum	2.1
Informa	2.6	Lannoo	1.4	Lannoo	1.8
Brill	2.4	Honoré Champion	1.3	Africa World Press	1.5

Discussion and conclusions

Despite the widely held idea that the SSH are characterized by fragmentation, the results indicate that book publishing in Flanders is fairly concentrated and a relatively small number of publishers publish the majority of books. Moreover, this concentration is increasing and is especially pronounced for the peer-reviewed books. In this sense, the results are in line with those of Sivertsen and Larsen (2012).

The study has a few limitations. First, it is based on data from one region and it is unknown to what extent the results can be generalized. Second, while great care was taken to assign the most correct name to each combination of ISBN prefix and year, it is possible that some mergers and acquisitions are not accounted for, especially when they apply to smaller publishers. Third, a subset of books in the data was not taken into account for various reasons. While it seems correct to leave out some (e.g., ‘books’ without ISBN), other cases are within the scope of the paper, such as books with more than one publisher or books for which a disciplinary classification is not available (for the analysis at disciplinary level).

Some disciplines are much more concentrated than others. Looking at the top publishers per discipline, it can be observed that most disciplines have a specific publisher profile that reflects the publishers’ specialization(s) as well as scholarly communication patterns within the discipline.

There seems to be an overall alignment between the dominance of major publishers on the one hand and the local/global orientation of a discipline on the other. A discipline like Law is to a large extent tied to a national context and, hence, relies much less on the international visibility that is associated with large international publishers. This is different for, e.g., Psychology, which mainly tends to publish books through larger, non-Flemish publishers.

A similar observation holds when we compare the peer-reviewed to the non-peer-reviewed books. It has already been observed that non-peer-reviewed book publications rely much more on local publishers (Verleysen & Engels, 2014). Interestingly, we also witness that the two exhibit a rather different temporal pattern for the Gini index: steadily increasing for the former, while increasing and then decreasing for the latter.

The strong increase in concentration for peer-reviewed books is remarkable if we consider that several new options for having books recognized as being peer-reviewed have appeared since the VABB-SHW’s first edition (GPRC, book series...). This is most likely due to acquisitions and mergers. If we treat divisions and imprints as separate entities, different patterns might emerge, especially at the disciplinary level. Most large multidisciplinary publishers maintain a portfolio of imprints that have a focus on specific disciplines. A typical example is the Mouton imprint of De Gruyter, which exclusively publishes works in linguistics and communication science. A more systematic analysis of this is left for future research.

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