

Questions and Answers on Cochrane-Wiley's new publishing contract

Background

1. What does Wiley do for Cochrane?

The publisher is responsible for the publication and global dissemination of the *Cochrane Library*. Specific services provided by Wiley include, but are not limited to:

- The publishing platform and all associated publishing and access systems;
- Investment in *Cochrane Library* editorial and product development and Cochrane Clinical Answers;
- Direct funding to support Copy Editing, Editorial and Product teams within the Central Executive Team;
- Editorial publishing services, including policy and standards support;
- Global sales, licensing and marketing (including public relations);
- Impact analytics and user and market research;
- Customer support and training;
- Publishing strategy support.

2. Why do we need a publisher?

Our publishing partner plays a key role in increasing the accessibility, awareness, usability and impact of *Cochrane Library* content to ensure Cochrane evidence is at the heart of health decision making globally. The publisher gives us access to specific publishing expertise that would not be cost effective to provide in house. The publisher also offers a specialised global sales force that markets and sells the Cochrane Library in a way that Cochrane could not replicate.

The *Cochrane Library* is key to the delivery of Cochrane's financial sustainability and its strategic goals and objectives. The publishing relationship is a critical strategic partnership for Cochrane, as up to 90% of our core income is from the Cochrane Library publishing contract. This income is invested back into the Charity to deliver Cochrane's strategic goals and to fund its governance, management, Central Executive Team (CET), as well as providing support to more than 190 Cochrane Groups around the world.

Process

3. What was the tender process?

We ran a standard competitive tender process in 2019, as summarised in figure 1, asking publishers to respond to a formal Request for Proposal (RFP) document. We published the RFP on 21 May 2019, received proposals on 9 July 2019 and completed our evaluation and preferred publisher selection process in late September 2019.

Publishing proposals were assessed against key strategic goals and a set of detailed editorial, production and publishing operational criteria which included: *Cochrane Library* product development; contribution

to Cochrane’s future financial sustainability; our open access ambitions; and the quality of editorial services, sales and marketing, customer support, and publishing technology.

Figure 1: Tender process

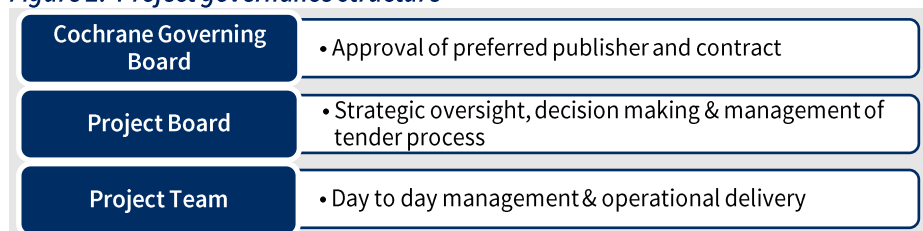


The tender process was delivered and managed by a Project Team from Cochrane’s Central Executive Team with strategic oversight and decision making provided by a Project Board with representatives from the Senior Management Team, Cochrane Governing Board and Cochrane Editorial Board.

Project Board: Martin Burton, Paul Garner, Chris Mavergames, Jordi Pardo Pardo, Charlotte Pestrige, Karla Soares-Weiser, Mark Wilson.

Project Team - Jo Anthony, John Hilton, Debbie Ojikutu, Charlotte Pestrige, Harriet MacLehose, Dan Shanahan, Gert van Valkenhoef.

Figure 2: Project governance structure



4. Why did you run the tender and publishing review at this time?

The Cochrane Library is the main output and mechanism by which we achieve our mission and deliver Cochrane’s strategic goals and objectives; and is the main source of income for the Charity. It is therefore essential that we undertake periodic reviews of our publishing arrangements to ensure they are optimally aligned to our mission, deliver our publishing aims and objectives, and are based on our understanding of current operating environments and future trends. The 2019 publishing tender was the first detailed publishing review completed since 2012 and the first competitive tender for the Cochrane Library publishing contract since 2003.

5. Who else was interested in the publishing contract other than Wiley?

As this was a competitive tender, we cannot disclose details of the other publishers who participated in the tender process.

To make sure we reached as many publishers as possible we advertised the tender in scholarly publishing news channels and on the Cochrane website. The ‘request for proposal’ document was shared with nine publishers, so a broad range of publishers were given the opportunity to respond to the Cochrane Library publishing tender, and many of them did so. Three publishers were eventually shortlisted and invited to present to the Project Board in London in September 2019.

The selection of Wiley as Cochrane's future publishing partner

The selection of Wiley as Cochrane's future publishing partner was made by the Cochrane Governing Board based on the recommendation of the Project Board. A formal vote for the 'preferred publisher' was taken by the Governing Board during its meeting on 25 September 2019.

The subsequent contract negotiation with Wiley was managed by Mark Wilson, Cochrane's Chief Executive Officer, and Charlotte Petridge, Head of Publishing, Research & Development, guided by negotiation points agreed with the Governing Board in October 2019. The final contract was approved by the Governing Board in June 2020.

6. What were the main reasons for selecting Wiley; and did you take the easy option by choosing them?

Cochrane entered this publishing review and tender process ready to recommend a change in publisher, so the final decision by Cochrane's Senior Management Team and Governing Board was not about taking 'the easy option'. The rigorous publishing assessment and review process ensured that we were in a well-informed and evidence-based position to identify the best solution and publishing partner for Cochrane.

The detailed analysis made by the Project Team against a wide-ranging set of criteria (Question 3, 'What was the tender process?') clearly showed that Wiley continued to offer the best publishing solution and partnership for Cochrane in future. The Project Board assessed the Project Team's data and analysis and was unanimous in approving the recommendation to the Governing Board.

In addition to an excellent financial offer providing financial sustainability for Cochrane, Wiley was able to meet our requirements and expectations in other important strategic areas, including open access, product development and publishing technology with a level of commitment that was not available from other publishers.

7. What are the long-term implications of selecting Wiley?

The new publishing contract with Wiley will support and help to deliver four key strategic objectives for the Cochrane Library:

- 1) Make Cochrane Reviews and dissemination products more discoverable, accessible, and useful.
- 2) Increase the global awareness and impact of Cochrane content to ensure Cochrane evidence is at the heart of health decision making globally.
- 3) Ensure long-term financial sustainability for Cochrane.
- 4) Guide the management and development of Cochrane's publishing technology systems.

What's new?

8. What's new about the new partnership with Wiley?

We are delighted with the outcome of this new publishing agreement for Cochrane as we think it gives us a strong base from which to continue to develop and grow the *Cochrane Library* in the coming years; the opportunity to increase the *Library's* impact on health decision making around the world; and a guaranteed and secure financial foundation for the organization to achieve its future ambitions over the next decade. Key areas of improvement and commitment include:

- Improved financial terms giving Cochrane a higher and more predictable financial base, and immediate funding for the organisation.

- Strategic and financial commitment to ongoing product development for the Cochrane Library, including a review of the multi-lingual publishing strategy for the Cochrane Library, and a product roadmap which addresses the priorities of our users, funders and purchasers.
- Commitment to continue to provide a customisable and flexible publishing platform with ongoing review and development of our publishing systems; making use of emerging publishing standards and technologies to improve efficiency and user experience.
- Commitment to streamlining and improving the speed, reliability, accuracy and predictability for our end-to-end content publication process.
- Commitment to helping us achieve our open access ambitions and support a sustainable open access future for Cochrane.

9. Does the contract take into account Cochrane's multilingual ambitions?

Yes, Wiley will work with Cochrane to review the multilingual publishing strategy for the Cochrane Library in 2021.

Contract period

10. When does the new contract start?

The new contract starts from 1 January 2021.

11. How long is the contract?

This is a 10 years' publishing contract, committing both Cochrane and Wiley to a long-term extension of our partnership which we intend to see through to the end of 2030. However, Cochrane and Wiley recognise that both health care and publishing will be rapidly changing environments in the next decade, and therefore to ensure sufficient flexibility to respond we've agreed two potential 'break' points in the contract, at the end of 2025 and 2028.

12. Does this contract lock us into a subscription model that means we can't move to open access?

Wiley will monitor, assess and test new open access business models as part of an ongoing review process. Cochrane controls any open access decisions for Cochrane Reviews during the term of the contract.

Finances

13. What are the financial arrangements?

Wiley will pay Cochrane a royalty on all revenue earned. The royalty rate is linked to a more predictable funding model for Cochrane. Details of the royalty rate cannot be shared as this is commercially sensitive information. However, the guaranteed annual payments, the royalty rates operating from the first US\$ earned, and a signing bonus payment collectively give Cochrane a stronger, more sustainable financial foundation than it has ever had before; in order to support our ambitions and the strategic challenges we will have to overcome in the next decade.

In addition, Wiley will directly fund resources within the product, copy editing and editorial teams within the CET through annual editorial payments.

The revenue retained by Wiley is used to cover Wiley's staff and costs related to the publication and dissemination of the *Cochrane Library*. These costs include:

- The publishing platform and all associated publishing and access systems;
- Investment in *Cochrane Library* product development and Cochrane Clinical Answers;
- Editorial publishing services, including policy and standards support;
- Global sales, licensing and marketing;
- Impact Analytics and user and market research;
- Customer support and training;
- Publishing strategy support.

Further questions

14. Where can I direct questions?

In the first instance questions about the tender process and new publishing contract should be directed to Charlotte Pestrige, cpestridge@cochrane.org