

# Negotiations Planning Template

**Publisher:** Sage

**Renewal deadline:** December 2023

## Values alignment of current subscription/agreement

*Include your Libraries value statement or principles and align that against the current subscription or agreement you are reviewing. Use the alignment and the remaining questions to guide your negotiation.*

### Sage subscription alignment with Framework

- No author will be required to waive any institutional or funder open access policy to publish in any of the publisher's journals.
  - Yes, no waiver
- No author will be required to relinquish copyright, but instead will be provided with options that enable publication while also providing authors with generous reuse rights.
  - Yes, with exceptions ([information here](#))
- Publishers will directly deposit scholarly articles in institutional repositories immediately upon publication or will provide tools/mechanisms that facilitate immediate deposit.
  - No, we've never asked for it, and we should ask
- Publishers will provide computational access to subscribed content as a standard part of all contracts, with no restrictions on non-consumptive, computational analysis of the corpus of subscribed content.
  - No, we've never asked for it, and we should ask
- Publishers will ensure the long-term digital preservation and accessibility of their content through participation in trusted digital archives.
  - Yes, Portico
- Institutions will pay a fair and sustainable price to publishers for value-added services, based on transparent and cost-based pricing models.
  - No, not with the subscription.

**Your options** *List the various outcomes, interests and priorities below, include all extremes and ideas.*

List alternatives to the proposal provided by the publisher, including your best alternative if the negotiation fails.

- Any open access element
- A Read & Publish
- S2O?
- Subscription plus progress with the framework like auto deposit or TDM
- Sticking with the subscription status quo-list with 4-5% increase

- Paying direct to Sage (currently MIT Libraries uses a subscription agent to pay for our TbT subscription. Sage may prefer we pay them directly.)

List your interests and priorities regarding future agreements. *Some may overlap with above.*

- Any progress toward alignment with the framework would be good.
- We want to continue to provide access to the MIT community.

**Publisher's options** *List the various outcomes, interests and priorities below, include all extremes and ideas.*

List your guesses of what the other party's alternatives to their proposal could be and what their best alternative to a negotiated agreement is.

- Paying directly to Sage
- Stay with the subscription model

List your guesses of the other's party's interest and priorities.

- They probably want MIT Libraries to sign a Read & Publish. They have been asking us for a couple years.
- They want MIT to remain a customer.

### **Shared or tradeable options**

Are there any interests or priorities that you share with the publisher?

- Open Access
- Using the S2O model
- Providing access to MIT community
- MIT authors publishing in Sage journals.

Are there any interests or priorities that you do not share with the publisher?

Unclear at this point, should revisit after initial meetings

Can any of the above interests or priorities be traded to reach a successful agreement?

- S2O is something they have that we want more of, we could ask about this and say we would pay directly, something they probably want us to do.
- If they want us to do an open access agreement, we can do that, but they need to try to do autodeposit.

## Agenda and strategy

*List your plan for the first meeting including the talking points and strategy that you have developed from identifying priorities, interests, and alternatives.*

- Intros
- Opening for the umbrella speech / history. Thanks for agreeing to meet with us today. I want to get us all on the same page about how the MIT Libraries has purchased SAGE journals up to now, and what we are looking to change. We have done TbT for years, we did format change from p/e to largely e and have continued to pay the list price.
  - What are we trying to do and how does SAGE factor in, top 5 publishers were we spend money, but we don't publish a lot in the title (this isn't a criticism, just a fact about engineering and what subjects Sage publishes)
  - What if they bring up the NERL deal? We haven't been a part of the NERL deal and have been TbT forever, typically we aren't part of NERL deals that include journal packages. Our aims are typically different—NERL is focused on cost containment for the consortium, while we are focused more on openness, equity, and the framework.
- Umbrella speech, 2023 version
  - Schol com and collections together to leverage each other,
  - Framework and Enduring Vision
  - Experimenting with various OA models for the past several years
  - Equity issues with APC ; leadership has asked us to look beyond this model
  - Glad to see Sage doing S20
  - While we don't publish a lot with Sage, we care about the entire schol com ecosystem, and want to see framework alignment with all agreements.
- We want to see what models that they have—off the shelf would be great, but maybe we experiment with them, politely convey to them, because we don't publish a lot in SAGE an R&P is probably not going to be useful/attractive to us (no cost savings, no large gain in OA); also, there are equity issues around APCs, so we are less interested in R&Ps in general than we used to be because of that. We are interested in experimenting. They have S20; is there a way we could do a pilot with them on that? What else can we work on together? We'd love to partner with you in other ways.
- Mention the S20 option —they have two, one law.
- License - would like to get our journals content under an updated umbrella license (we have DDA ebooks license, journal backfiles, nothing comprehensive). Would like to include accessibility language, privacy amendment, for example