

## GENERAL ASSEMBLY

September 3, 2021 – 14:15 – 15:45 CET

### AGENDA

1. Presidents' report
2. Sub-committee reports:  
Post-graduate, Publications, Communication, External Relations, Policy,  
Finance, Research Networks, National Associations, Conference.
3. ESA finances
4. ESA publication strategy
5. Proposal of modification of Articles 6.4, 6.8 and 14 of the Statutes
6. Proposal of inclusion of a new Ethical Guideline
7. Reflections on ESA governance
8. Proposal of comprehensive review of the Statutes during 2021-23
9. Results from the Elections



## **PRESIDENT'S REPORT**

Marta Soler-Gallart, President of the ESA

### **Introduction**

During the last two years, European sociology has demonstrated its readiness to contribute to society and to social sciences to face the most unforeseen challenges. We have seen this in bringing respect towards the elderly and all human lives in a health emergency as well as in the new orientations of Horizon Europe research. It is incredible what sociologists from all over Europe and the ESA, representing all of us, have been able to achieve, turning many difficulties into amazing possibilities.

I would like to thank the current Executive Committee for the excellent collaborative work and the wonderful collegial environment which has made all the ESA accomplishments possible.

### **The 15<sup>th</sup> ESA Conference**

We are very grateful to the Local Organizing Committee (LOC) and the Conference Committee for having a contingency plan with four possible scenarios prepared until the final decision could be made. For that, they simultaneously set agreements with local premises in Barcelona, explored technology for online and hybrid options, and contacted online event organizers. The health situation in Europe finally obliged the Executive Committee to decide for the Online Conference, which has been wonderfully organized and has met with a highly successful response on the part of ESA members and other delegates.

The 15<sup>th</sup> ESA Conference has been the largest in ESA history, with 3851 registered participants from 74 countries and 3517 papers presented. In addition, we are counting on more than 140 volunteers from all over Europe, which have also become an added value of this virtual event. There is a wonderful diversity of speakers of high excellence covering important timely topics as well as special sessions in the afternoons and evenings to adapt to the different time zones of the speakers.

Due to the digital environment, besides Twitter, we have created Facebook and Instagram accounts for the Conference, which have been active under the hashtag #ESABcn2021.

## **Mid-term Conferences and Summer School**

During the lockdown in Spring 2020, the Executive Committee decided that the ESA should offer its members and Research Networks the infrastructure to easily turn these conferences into virtual events. The ESA purchased a Zoom plan that has been used by all the RNs which have requested for it. Furthermore, due to the permanent uncertainty faced by all, the Executive decided to allow for more flexibility in terms of timing, type of events, and eligible costs. Notwithstanding, I would like to thank the RN coordinators for the wonderful virtual mid-term conferences, which have been highly attended and very successful.

The Postgraduate Committee decided to hold the Summer School in September 2020 in Ljubljana in a hybrid mode, due to reduced numbers and sanitary restrictions. Nine students were able to travel and sixteen attended online in what finally became a truly profitable academic environment for students. Due to this positive experience, the 2021 Summer School has been also organized in a hybrid format in Barcelona. Congratulations to all.

## **The 16th ESA Conference**

The call for bids for a Conference city host had to be extended several times. The situation of uncertainty with the pandemic made it very difficult for potential proposers to take a step forward. Consequently, the Executive Committee decided to postpone this decision to the next term and the 2021-2023 Executive.

## **Publications**

In the Fall of 2019, the ESA faced a big problem: there had been a tender to move the ESA journals to a new publisher, but the contract previously signed with the current publisher had a clause that required compensation in case of transferring rights. For that, the association would have to pay more than 100,000 pounds to Taylor & Francis (for the compensation and digital archive). After a difficult negotiation, an agreement was reached in which services from T&F have improved and the ESA will be free to move to a new publisher without any charge by 2024. My gratitude to the Publications Committee for this achievement.

In the meantime, both *European Societies* and the *European Journal of Cultural and Political Sociology* have advanced significantly in terms of readership and impact factors, thanks to the wonderful task of the editors. The Publications Committee has worked in close collaboration with the journal editors, who have been involved in meetings and strategic decision-making. Due to the changing landscape of the publication arena towards Open Access – especially in Europe with PlanS – the Committee has operated in the direction of moving the two ESA journals to full Open Access by 2024. The creation of a third OA journal has been postponed to guarantee a successful OA transition of the two existing journals and to ensure that a third journal does not overlap in thematic scope with the current ones.

Moreover, thanks to the profound dedication of the Communications Committee, the ESA e-magazine *The European Sociologist* became a forum for discussion about the impacts of Covid-19 in our lives and in sociology. The call for papers on this topic was a great success, which led to two special issues under the title of “Pandemic (Im)possibilities”.

### **Strengthening financial transparency**

The Executive Committee decided, in its first meeting in October 2019, that the ESA needed a clearer budget to be able to take informed decisions which involved spending the membership money. The Executive also decided that the ESA should make the annual balance public, in line with many democratic international organizations. This has been accomplished thanks to the gigantic efforts of the Finance Committee, in collaboration with the ESA Office. They have been able to finally clarify the fixed costs of the association and track financial information. We have now a clearer picture of how the ESA has evolved (in terms of income and expenditures) over the last years.

### **Strengthening ESA democracy**

The Executive Committee is highly diverse, with elected members from different countries, backgrounds, RNs, and therefore democratic argumentation by all is crucial. Due to the facility for online gathering, there have been numerous meetings during this term and decisions have always been made by a majority, after deliberation. The sub-committees have met more than ever, and all the seventeen members have actively participated in collaborative work and decision-making. In February 2021 four members of the Executive decided to resign, as they did not agree with the majority, which is a right in any democracy. According to the ESA Statutes, the following most voted candidates should fill in; they all accepted and have actively participated since then in excellent collaboration.

Also thanks to online facilities, for the first time the Council of RNs has met twice before the Conference, providing crucial inputs to the Executive Committee, which have also become an added value of this virtual event

The digital technology can also help to strengthen transparency. The Executive invested in ensuring that all democratically elected members can have access to the ESA documents and archive, in order to make better informed decisions. Furthermore, the public budget will be available from now on to all ESA members.

Finally, my appreciation goes to the Policy Committee for its rigorous contributions with legal expertise. The Committee has worked on updating the ESA journal guidelines, creating an internal code of conduct, framing a new ethical guideline called for by four RNs, and formulating a few requested updates to the Statutes, in line with other international organizations like the ISA.

## **Strengthening the ESA Headquarters**

As a result of structural obstacles in the ESA administration, the Executive Committee has worked to overcome them through the following actions:

- President and Treasurer held online weekly meetings with the Office staff.
- Inclusion in the Office of one staff member with professional experience in accounting and budgeting.
- Establishment of a systematic procedure for authorizing payments.
- Conference assistant based at the city of the Conference, to work together with the ESA Office and the Local Organizing Committee, for nine months.
- Acquisition of a cloud space to store all the ESA archive documents with transparent full access to all the members of the Executive Committee.

The biggest obstacle overcome was:

- The website, with all the tools integrated (database with membership data, integration module to Conftool, voting function, etc.), had to be upgraded from Drupal 7 to Drupal 9. This upgrade created lots of errors in the system that posed huge challenges to the Office, due to previous flaws in the relationship with the web company. This has been solved with the following actions:
  - Signing of an agreement with the web company (until December 2021) through which all the source code now belongs to the ESA and the monthly services paid are clarified. My recognition goes to the Executive members involved.
  - Manual work and extra-hours in the Office.
  - Hiring support for the Office to fix errors manually.
  - Dedicating interns to fix errors manually.
  - One Executive member's full dedication on a volunteer basis (my sincere gratitude for her support).
  - New election tool system outsourced.

During the last two years, the following staff members have worked for the ESA Office. We are very grateful for their dedicated service to the ESA:

Andreia Batista: until June 2020

Myriam Meliani: July to December 2020

Dagmar Danko: until May 2021

Esmeray Yogun: from November 2020 until now

Elisabeth Torras-Gomez: January to September 2021

Gisele Tchinda: July to August 2021

Maria Vieites: August 2021

Amina Lahyani, Anna Pascual, Ignacio de Pouplana (Interns): May to August 2021

## **External Relations**

The ESA has been actively involved with the European Alliance for Social Sciences and Humanities (EASSH), which has been lobbying at the European Commission for the presence of social sciences in the Framework Programme of Research Horizon Europe, among other European-wide strategies. For instance, the ESA was invited to participate in a strategic meeting with publishers on OA prospects for journals in Europe.

Furthermore, in representation of the ESA, the President has been invited to participate and provide addresses at the following academic events:

- Polish Sociological Association Congress. Wroclaw, Poland, September 2019.
- Turkish Sociological Association Conference (video-recording address). September 2019.
- Conference of the Latin American Sociological Association ALAS. Lima, Peru, December 2019
- Italian Sociological Association Congress. Naples, Italy, January 2020.
- Lecture Series "Semana por la Esperanza". Centre of Latin American Studies, University of Cambridge, UK, Online, December 2020.
- ISA Forum. Online, February 2021.
- Portuguese Sociological Association Conference. Online, March 2021.

## **Afterword**

My final words are of gratitude to all the ESA members who have been organizing academic activities, preparing conference sessions, strengthening networks, and promoting sociology across Europe. Today we are 3060 members in ESA. My recognition to all the sociologists who keep defending the democratic grounds and spirit of this wonderful association of which I am so proud to be a member myself.

Marta Soler-Gallart  
President of ESA 2019-2021



Report Finance Committee 2019-2021  
General Assembly 3<sup>rd</sup> September 2021

**Finance Committee Members:**

Teresa Consoli (Chair)  
Dilek Cindoglu  
Tomáš Kostelecký  
Tiziana Nazio  
Apostolos Papadopoulos

All throughout since the beginning of this mandate (2019-2021) the whole Executive and especially the Finance Committee have been working very hard in pursuing **transparency** and **accountability**.

The **Finance Committee** faced many challenges but worked intensively in a very democratic and cooperative atmosphere. The Committee met many times on-line and, notwithstanding the epidemic, in three occasions the Treasurer (twice also with one other member of the Finance Committee) went to the Paris Office and had direct contacts and exchanges also with ESA consulting society and the bookkeeper. The Treasurer, together with the President, also had weekly meetings with the Office throughout the mandate.

Due to the pandemic, the ESA **Conference** decisional process has been very demanding and the Committee worked side by side with the Conference Committee and the LOC to define possible scenarios, to estimate their economic sustainability for ESA and to monitor their progression. The Finance Committee carried out the following: first, profiled a **conference prototype budget** whose use it encourages for all future ESA conferences (see ANNEX 1); second, it configured different **scenarios** and contingency plans in consultation with the LOC, with respect to a series of possible epidemiological circumstances and to the estimated numbers of participants (online and/or face to face - Finance Committee Report January 2021).

ESA Executive Committee and the LOC decided, at a final stage, to hold the 15<sup>th</sup> ESA conference in an online-only format, but since the beginning the Finance Committee strongly supported devising the **lowest possible conference fee**. In what was initially planned as a hybrid mode scenario, the conference fee structure for onsite participants was reduced back to Athens' fee (2017), while in the online-only mode the Committee suggested, and ESA approved, the cost of only 20 Euros for ESA regular members. Foremost, given the high uncertainty linked to the pandemic, the Committee played strategically along several dynamic scenarios for many months, to ensure that ESA's finances would not be endangered. In this connection, the Committee collected and analyzed data from previous conferences and devised a series of comparative charts and figures to reduce uncertainty and to allow future Executive Committees

to maximize the leverage in keeping conference fees as low as possible. The income from conference fees is reduced with respect to previous mandates, but so are also the costs of the conference, which is the largest conference ever organized by ESA with over 3800 registered participants.

Despite the extremely low fees and the pandemic circumstances, the conference will generate no loss of income and, at present, ESA has achieved the ever-highest number of members. The Committee leaves the next Executive with over 3000 members and a safe economic situation. During its mandate the Committee also **increased** the amount on money placed in the two **ESA savings**.

The main types of **expenses** for ESA are the conference organization, the personnel costs and the IT services (next to other service providers of lesser amounts). On the expenses side the Committee discussed a transparent procedure to be followed for all payments, formalized in the ESA **Payment Protocol**, which was finally approved by the Executive on February 2021 (see the ANNEX 2). On the personnel side, since October 2020 the **ESA Office** has benefited from the professional work of a highly skilled administrator with a PhD in budget management and accounting, Esmeray Yogun, actually contractualized as ESA **Executive Secretary**. Since January 2021 also Elisabeth Torras-Gómez temporarily joined the Office working as Conference Assistant until September 2021 to preciously and tirelessly assist with the conference organization, the media management and the LOC.

The Committee highlights the need to increase ESA personnel, especially concerning IT skills as the Office, with the tireless support of Tiziana Nazio, had to cope with several disruptions and malfunctioning of the ESA website, database and emailing. With the competent work of the Executive Secretary, ESA has monitored permanently the membership and conference registrations, assisted members and RNs coordinators, consolidated its members' database and achieved its **Public Budget** (see ANNEX 3) enumerating the previously mentioned ESA incomes and the different ESA Expenses.

Finally, the Committee decided to share safely all ESA docs, invoices and payments on a new **data storage** that will be available on request to all future Executive members.

This two-year mandate has been very demanding and for accomplishing its role as ESA Executive members the Finance Committee has pursued the aim of making ESA both more transparent and more accountable. We hope that all ESA members will sooner or later appreciate this vast effort.

ANNEX 1 – Conference Budget

ANNEX 2 – Payment Protocol

ANNEX 3 – Public Budget



ESA Conference		Details		ESA estimated budget	
Income & Cost Categories				incl. VAT (if applicable)	
INCOME		Participants			
		Quantity	Duration	Price	Barcelona Conference
<b>1.</b>	<b>Registration</b>				
	ESA Members				
	Non Members				
	Cancellation fees				
	Invited				
	Volunteers				
	<b>AVERAGE FEE</b>				
	<b>AVERAGE INCOME</b>				
	Conference Party				
	Conf. Programme				
	Lunch Boxes				
<b>2.</b>	<b>Sponsoring</b>				
	Support by University/City/State				
	Support by .....				
<b>3.</b>	<b>Exhibition &amp; Advertisement</b>				
	Digital Boots				
	Exhibition Stand				
	Abstract book: Inside Front Cover				
	Pinboard				
	Flyer				
<b>Total Income</b>					
<b>EXPENDITURE</b>					
<b>1.</b>	<b>Rental of premises</b>				
	OPENING				
	CVENT				
	CONFTOOL				
	STREAMING				
<b>2.</b>	<b>Technical Equipment</b>				
	VENUE 1				
	VENUE 2				
	VENUE 3				
	REGISTRATION: Laptop				
	REGISTRATION: Facilities				
	REGISTRATION: Printers				
	EXHIBITION: Stands				
	EXHIBITION: Electrical supplies				
	OPENING: Audio equipment & music for the Welcome & Farewell Party				
<b>3.</b>	<b>Print &amp; Materials</b>				
	Conference Website				
	Conference Graphic Design (Logo etc. incl. Book Preparation)				
	Pocket Book + Guide Printing + posters + opening leaflet				
	Programme Book Printing (incl. postage cost)				
	Conference Bag (incl. Flask)				
	Conference Flask				
	Name Badge + Lanyard + pen				
<b>4.</b>	<b>Catering</b>				
	Welcome Reception				
	Coffee Breaks Venue 1				
	Coffee Breaks Venue 2				
	Coffee Breaks Venue 3				
	Lunch Boxes				
	Water for Speakers and Water Stations for Participants				
	Conference Party				
	Conference Party - student staff				
<b>5.</b>	<b>Services</b>				
	Media Manager				
	Abstract Management				
	Abstract USB preparation				
	Promotion				
	Online registration form, reports from ConfTool				
	Registration: Secretariat				
	ESA Secretariat				
	Exhibition/Sponsorship management				
	ESA Conf. Manag. (incl. Abstr-Registr-Sess-CIP-Comm-Planning)				
	Legal advice				
	Registration: Software				
	Onsite Preparation and Coordination				
	Registration: Badge Name Printing (Work & Supplies)				
	LOC Coordination & Website update				
	LOC Volunteer Coordination				
	Postage				
	Service: Signs, Signets for indicating rooms etc.				
	Electrician (e.g. exhibition and all venues before and during the conference)				
	IT Services: set up of the equipment in all venues				
	IT Services: troubleshooting, fixing and overlooking of equipment				
	Transportation (between the venues)				
	OPENING: AV Service - Cultural Programme				
	OPENING: Video transmission				
	OPENING: Video production & video streaming (for plenaries)				
	OPENING: Cultural Programme				
	OPENING: Student staff				
	CLOSING: AV Service				
	STAFF: Volunteers (training and allocation of tasks)				
	STAFF: Students				

	STAFF: Lunch boxes for volunteers			
	STAFF: Baby sitting			
	SERVICE: Cleaning (before, during and after the conference)			
	SERVICE: Security (before and during the conference)			
	SERVICE: Ambulance & doctor			
	Insurance: OPENING-SPECIAL-CLOSING			
	Insurance: Venues			
<b>6.</b>	<b>Invited</b>			
	Accommodation Invited Speakers			
	Accommodation Exec			
<b>7.</b>	<b>Bank fees (credit card processing fees)</b>			
<b>Total (expenditure)</b>				
		<b>AVERAGE COSTS</b>		
<b>Balance</b>	<b>(surplus)</b>			



European  
Sociological  
Association

## ESA Payment Protocol by 01/02/2021

**ESA Treasurer:** Teresa CONSOLI

**Finance Committee:**

Teresa CONSOLI

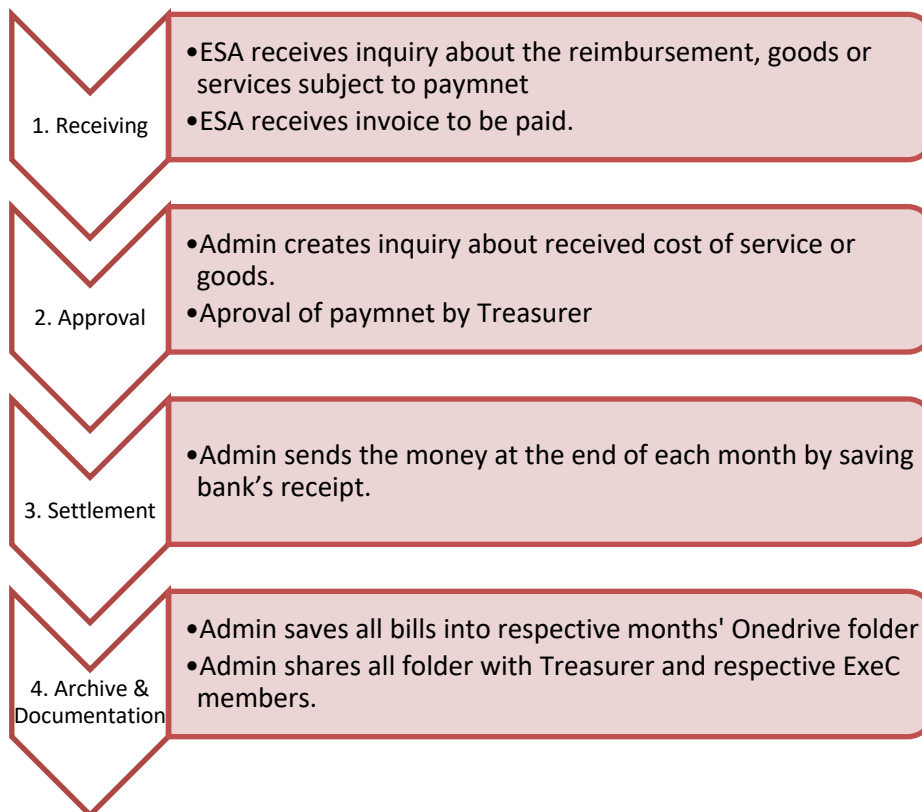
Tiziana NAZIO

Apostolos PAPADOPOULOS

Dilek CINDIOGLU

**ESA Admin:** Esmeray YOGUN

**ESA has 4 stages payment processing:**





European  
Sociological  
Association

## ESA Payment Options

Cash	
Checks	
Credit Card	
Electronic bank transfers	
Online payment	
Automatic payments orders specifically for recurring bills	

### ESA Bank Account :

ESA Consultant Mme Charlotte TARDIVON

Address : Crédit Mutuel Caisse de PARIS 17 ETOILE Banque 30 AVENUE NIEL 75017 PARIS

06047 000201114 01	
06047 000201114 02	
06047 000201114 03	
06047 000201114 61	

This procedure has been discussed and proposed by the ESA Finance Committee and ratified by ESA Treasurer and President.

ESA President  
Marta SOLER GALLART

ESA Treasurer  
Ter NSO  
CONSOLI  
MARIA  
NSO  
10.02.2021  
11:31:23  
UTC

<b>ESA INCOME</b>			
	<b>Actual 2020</b>		<b>Provisional Budget 2021</b>
<b>Membership fees</b>	<b>36.440,00</b>		
Collective members			
Individual members			
RN membership			
<b>ESA Journals</b>	<b>51.668,00</b>		
EJCPS			
EC			
<b>ESA Conference</b>	<b>NA</b>		
<b>Total</b>	<b>88.108,00</b>		
<b>ESA EXPENSES</b>			
	<b>Actual 2020</b>	<b>%</b>	
<b>Administration</b>	<b>48,635.00</b>	<b>16.75</b>	
<i>Web development</i>			
<i>Income tax</i>			
<i>Digital services (Conftool, Microsoft, Zoom, Web hosting.)</i>			
<i>Office supplies</i>			
<i>Office rent</i>			
<i>Bookkeeping</i>			
<i>Professional fees</i>			
<b>Personnel costs</b>	<b>129,902.00</b>	<b>44.74</b>	
<i>Salaries &amp; benefits</i>			
<i>Compensation</i>			
<i>Complementary health care</i>			
<i>Employees' social declaration</i>			
<i>Personnel development training</i>			
<i>Staff lunches</i>			
<i>Conference assistant salary (contract)</i>			
<i>Conference Interns</i>			
<b>Executive committee</b>	<b>2239</b>	<b>0.77</b>	
<b>LOC service fee</b>	<b>40000</b>	<b>13.77</b>	
<b>Research Network expenses</b>	<b>27,280</b>	<b>9.39</b>	
<i>Membership dues</i>			
<i>ESA Support</i>			
<b>PhD Summer School (Workshop)</b>	<b>6,827.00</b>	<b>2.35</b>	
<b>Editorial Board</b>	<b>33,146</b>	<b>11.41</b>	
EJCPS			
ES			
<b>Internatioanl Relations</b>	<b>908</b>	<b>0.31</b>	
ISA Membership			
EASSH Membership			
<b>Other</b>	<b>1,349.00</b>	<b>0.46</b>	
Banking charges			
<b>Total</b>	<b>290286</b>		
<b>CAPITAL &amp; RESERVES (PROFIT) // SURPLUS</b>			

## **Postgraduate Committee Report (2019-2021)**

### **Members of the Committee:**

Milica Antić Gaber, Chair; Sanna Aaltonen, Lynn Jamieson, Apostolos Papadopoulos, Dilek Cindoglu, Lúgia Ferro until (May 2021) members; from May 2021 on: Milica Antić Gaber, Chair; Apostolos Papadopoulos, Dilek Cindoglu, Lúgia Ferro and Gerben Moerman, members.

Committee members mostly worked and discussed issues via Zoom meetings.

At the beginning of the work of this committee we planned our activities based on the legacy of the work of the Committee members and Paris office in previous terms. The main task of the Postgraduate committee therefore was to:

- organize two PhD Summer Schools (one in 2020; one in 2021);
- organize other activities for the PhD students and early researchers at the conferences and in the period between them (face-to-face sessions with senior scholars, on-line networks etc.)
- to launch together with the conference committee, the Award for Best Young Scholar;
- the possibility of midday specials - for presentations of the awarded papers.

The first task was decided to be realized in September 2020 with the organization of the PHD Summer School in Ljubljana, Slovenia in the premises of FF UL (Faculty of Arts University of Ljubljana) and with Milica Antić Gaber in the role of the Director of the School.

The Call for applications was published in December 2019, deadline for applications was set for March 1<sup>st</sup> 2020. We asked members of the Committee to help spreading the Call widely. We got 137 applications in time, plus 11 with a day or more after the deadline; they were from 29 countries and many more different universities.

After the careful evaluation process in which the 25 papers/participants were selected following these criteria:

- relevance and strength of research question
- theoretical engagement
- methodological approach
- scholarly contribution
- academic achievements.

The main challenge then was the organization of the PhD SS as we were already in the pandemic situation. After the discussion of the three options

Option A: To organise On-line PhD SS in the planned timeframe.

Option B: To postpone PhD SS to the Spring 2021 (as many or even all RNs has been doing), to sometimes in March 2021– dates to be decide on the Meeting.

Option C: To organise it in the end of Summer in hybrid model.

The Committee decided to organize the school in a hybrid model, which required additional careful organization and special new tasks for the hosting institution. Committee came to this decision bearing in mind the goals and rationality of the PhD SS (which goes beyond the bare presentation of the students' papers) but also giving them opportunities to meet, socialise, visit another country; discuss among themselves and meeting professors, ESA President and Slovene sociologist and editors of our journals in person (in the breaks).

**PhD SS in Ljubljana** was successfully organized in the premises of UL FF in the hybrid model (combined in-person and on-line participation of the students). 9 participants attended in person and 16 participants engaged via Zoom. Therefore, only nine participants were able to travel and to attend the school in person in Ljubljana and those (with two exceptions UK and Lithuania) travelled from the nearest central European countries Italy, Austria, and Germany. Moreover, none of the professors was able to travel due to severe pandemic situation, only professor from Ljubljana was present on site all the time.

The programme of the Summer School was planned to be organized in a way to give the participants the opportunity to discuss all the paper presented and to get responses to her/his own paper from other participants and professors involved in the School. Listen to the lecture of the ESA President Marta Soler Gallart on how to write an article that can be published in a High-Ranking Sociological Journal and talked to the Editors of ESA Journals Michalis Lianos and Paul Blokker on How to publish a good sociological paper. The participants also meet Slovene sociologists (The President of Slovene Sociological Association – Hajdeja Iglič) and the editor of its Journal (Marjan Hočevar).

The Programme of the PhD Summer School was successfully realized without major difficulties even though technical equipment was not on a high level at that time.

After the end of the PhD SS the participants were asked for the reflections. They were quite positive; they also had some suggestions on the organization which the Committee discussed when discussing the organization of the next SS.

All the participants were sent the Certificates of attendance.

A short report on the PhD Summer School was published in the European Sociologist concentrated on the work and organization in the hybrid model by the Chair of the Committee and by the best paper presenter *Hamide Elif Uzümcu; University of Padova, Italy.*

The organization of the **second PhD SS in August-September 2021 in Barcelona** was decided to be organized by the new Director of the SS 2021 – Dilek Cindoglu.

For this year Summer School, we got 147 applications from 17 countries, 32 were accepted. The evaluations were made on the same criteria as the previous one. The program follows the same goals and the structure as the previous ones and will be also realized in a hybrid model with more professors being present on-site in Barcelona.

At the same Conference in Barcelona for the first time new Award will be announced - **Young Scholar Award** and it will be presented in the Midday Special with which ESA would like to encourage and stimulate young sociologists in the field.

Ljubljana, August 2021

Chair of Postgraduate Committee

Milica Antić Gaber





## **Report of Activities Publication Committee (PC) of ESA-Exec period 2019-2021 (Ludger Pries, Chair of Publication Committee, July 2021)**

In its working period August 2019 to August 2021 the PC had to cope with many challenges. In general, the landscape for scientific publishing is changing at a dramatic pace, being open access (OA) and transparent, high quality publishing of journals and books of major relevance. The specific situation of ESA was that at our Manchester conference in the general members meeting the outgoing president had announced that ESA would open a third scientific journal in full OA and shift all journals to a new publisher (Bristol University Press). This announcement was challenging because (1) there was no specific plan for the third journal, (2) the editors of the two already existing journals were not involved in any discussion about this (especially the unique selling points of the new journal in order to prevent cannibalizing effects on the already existing), (3) the legal contract with Taylor & Francis (T&F) did not allow a fast termination except by paying a high amount of money (some 80,000 to 100,000 Pounds) that would have surpassed ESA's financial possibilities, and (4) the supposed new publisher already had specific expectations concerning the supposed 3 journals.

Given this situation, the PC worked hard in finding a solution to the challenges with which it came across. From the very beginning, all journal editors were included in these activities, and the PC organized a democratic, inclusive and transparent working atmosphere. During the two years, there were more than ten meetings of the PC. The PC, together with the President and several members of ESA's Exec, held meetings and talks with publishers and lawyers in order to keep legal, financial and public damage away from ESA. After extensive debates in the PC and the overall Exec, the President could sign an addendum to ESA's contract with T&F that gives ESA full sovereignty to decide its own publication strategy and sign a new contract with T&F or another publisher or hosting institution until end of the year 2023 without any financial burden.

Additionally, the PC evaluated extensively the situation and publication strategies of its two journals, included all editors in the deliberation processes, supported the training of their technical editorial assistants, and organized successfully an open and transparent selection process for a new editor team of *European Societies*. The PC also developed a proposal for a *Best Paper Award* for the two journals that will be granted every two years in the context of the ESA conference. It defines a mechanism to signal ESA's criteria and preferences of good scientific journal articles.

The PC elaborated specific criteria and recommendations for ESA's publication strategy that were widely discussed and finally adopted by the Exec in July 2021. This gives the next Exec for the period 2021-2023 all options to decide on ESA's publication strategy without any binding announcements or legal risks.

In order to facilitate transparency of the PC's work, after the important "[Annex 1: Criteria and recommendations for OA and publishing strategy of ESA](#)", which makes suggestions for the future work of ESA's PC, this document includes a brief report of ESA's negotiations of the Addendum to our contract with T&F ([Annex 2](#)) and 3 activity reports of the PC for the period August 2019 to May 2020 ([Annex 3](#)), May 2020 to November 2020 ([Annex 4](#)), November 2020 to May 2021 ([Annex 5](#)).

## Annex 1:

### Criteria and recommendations for OA and publishing strategy of ESA

Proposal ESA Publication Committee and journals' editors, July 2021

Given the complex and highly dynamic landscape of scientific publishing in social sciences in general and the specific situation that the Executive Committee (ExeC) of ESA 2019-2021 had to cope with, the ExeC renegotiated the old publishing contract with Routledge/Taylor & Francis (T&F). As the current contract with T&F ends in December 2023 and gives ESA all freedom to decide on its general publication strategy, the new ExeC 2021-2023 can and has to redefine ESA's publishing strategy, especially the future hosting of our 2 journals. In a broad process of consultation and deliberation based on the work of the Publication Committee, the ExeC elaborated the following criteria and recommendations for the next ExeC.

In order to take sustainable decisions and before going into details, we would like to underline the specific situation of ESA's journals. Although hosted currently by a commercial publisher, both journals ES and EJCS are property of ESA. ESA is fully free to decide on their future and by contract has all rights to receive all substantial and necessary data from T&F in case the contract would not be replaced by a new one with T&F.

In light of the work and discussions of the ExeC 2019-2021 we would like to stress some specificities of ESA's situation. ESA's governance structure is characterized by ExeCs that change every two years with options to remain for two periods/4 years as members of ExeC. By our statutes, journal editors rotate every 5 years. Our Paris office has a quite lean staff, not one only person specialized in publication issues (except responsibility for our magazine The European Sociologist).

Based on our experience as ExeC and given the circumstances that all members of ExeCs and also our editors normally are full-time sociologists dedicated to other duties than ESA, the new ExeC should consider and calculate pros and cons of either rely on external professional publication expertise (as we did and still do with T&F) or develop genuine own collective memory and professional knowledge that lasts longer than the periods of our ExeCs and editors. Based on our experiences, we propose the following criteria and recommendations.

#### 1. Basic aspects and criteria of ESA's publishing policy for its journals

Basic aims	Criteria	Comment
Scientific quality of journals	Metrics <sup>1</sup>	ESA aims at high journal <b>impact factor</b> (for recognition in scientific community) and high Altmetric (for perception in broader audience) proposal SJR, HPoP.

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<sup>1</sup> In a range of priorities: 1. **SJR** (see: [SJR : Scientific Journal Rankings \(scimagojr.com\)](https://www.scimagojr.com)); 2. **HPoP** (see <https://haring.com/resources/publish-or-perish>); SJR and HPoP are freely accessible and include most of relevant metrics; 3. **Altmetrics** (see: <https://www.altmetric.com/> - citations in the broader public, wikipedia and overall visibility in the broader society per; ESA should ask publishers to provide this service).

	ESA quality criteria <sup>2</sup>	ESA defines <b>own quality criteria</b> via a bi-annual award (1 <sup>st</sup> to 3 <sup>rd</sup> ) for excellent ESA articles aiming at a broad scope of paradigms, methods and topics. <sup>3</sup>
<b>Inclusiveness and transparency</b>	For readers	ESA aims at offering <b>full OA journals</b> without barriers of access. Aims and review processes of the journals should be transparent. <sup>4</sup>
	For authors	ESA aims at offering <b>full access for all quality papers without or with low direct cost for authors.</b> <sup>5</sup> Reviewer selection and reviews are treated in a transparent way. <sup>6</sup>
<b>Editorial professionalism</b>	Professional staff <sup>7</sup>	Given the high turnover rate of ESA committees and of editors, ESA has to rely on and budget for <b>high qualified professional technical assistant staff.</b> <sup>8</sup>
	Training activities <sup>9</sup>	Given the highly dynamic landscape of scientific publication ESA has to <b>guarantee and budget yearly training activities for editors and editorial assistants.</b>
<b>Financial sustainability</b>	Income <sup>10</sup>	ESA does not aim at making money with the journals, but <b>increase revenues for publication development</b> ; incoming money could derive from royalties or APC-bonds.
	Ongoing costs <sup>11</sup>	Fix costs include editorial assistance, editors' travelling costs, training costs; incoming resources for each journal should at least equal ongoing <b>costs of some 30,000<sup>12</sup> €</b>

**Goals and strategy**

1. ESA aims at balancing the before mentioned general aims.
2. Both journals (and possible further ones) should produce win-win-effects by differentiation to avoid competition.
3. ESA wants to transform both journals into full OA until January 2024 at the latest.

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<sup>2</sup> Genuine sociological approaches; clear focus on theory and empirical evidence driven journals; interdisciplinary references; the awards could be defined e.g. annually by the ExeC based on PC proposal.

<sup>3</sup> The awards involve a selection committee with members of the Publications Committee, of editorial boards of the journals, and journal editor, with criteria that combines quality, novelty and plurality in the research approaches. The awards are announced in the ESA bi-annual conference.

<sup>4</sup> Cost calculation and publisher negotiations should include a substantial raise of journal pages per year.

<sup>5</sup> ESA aims at balancing APC costs of PlanS and rich countries with a system of waivers so that authors will have either no direct costs or reduced costs for publishing papers in our journals.

<sup>6</sup> APCs should be financed via PlanS countries and low or now costs for authors from other countries. Concerning transparency, journals' current information should be reworked and extended, especially concerning review policy and procedures (see e.g. <https://www.tandfonline.com/action/journalInformation?show=aimsScope&journalCode=reus20>).

<sup>7</sup> When going with a publisher: number and availability of staff dedicated to social science; indexing; promotion of visibility; no. of sociological journals hosted.

<sup>8</sup> Part of the professional support should be covered by the Publisher (promotion of articles, support to editor's initiatives, part of training of editors etc.); part of the professional support should be covered by ESA (editorial assistant).

<sup>9</sup> Quantity and quality of workshops, meetings etc.

<sup>10</sup> Royalties, incoming APC-reimbursements, fixed agreed budget etc.

<sup>11</sup> Technical/editorial assistant, print copies etc.

<sup>12</sup> Publication budget of ESA should include: travelling/office costs for editors, salaries for editorial-technical assistants, language checking costs, fees for training of editors and assistants

4. Incoming royalties and/or APCs should at least balance with the ongoing costs.

## **2. Recommendations for ESA's Strategic options for OA and general publication policy**

The Executive Committee and its Publication Committee of ESA, period 2019-2021 had to re-define and renegotiate its publication strategy in general and the contract with T&F. The ExeC 2019-2021, with full participation of all editors of our journals, decided to transit both journals to Open Access (OA) in a reasonable period of time (until 2023 to 2025).

After having denied to open a fully new OA and third ESA journal, we concentrated on deliberation with the editors of our 2 existing journals and concluded the following four options:

1. Signing a new contract with an established university publisher,
2. Signing a new contract with an established commercial publisher,
3. Signing a new contract with a new OA publisher,
4. Signing a new contract with a non-profit scientific institution to host the 2 journals.

Based on the criteria mentioned before (section 1), on many conversations with representatives and experts of different organizations involved and on the deliberation in the ExeC and with the editors, we make the following comments on the four options.

### **2.1 Option 1: university publishers**

We analyzed structure and strategy of Cambridge University Press (CUP), Oxford University Press (OUP) and Bristol University Press (BUP). In Sociology, CUP had relatively high impact factors for social science journals, but only hybrid journals in sociology, no explicit OA strategy and quite high APCs. OUP hosted only one new OA journal in sociology and also had high APCs. BUP had no experience in OA journals in social sciences, only some hybrid ones, no one in Sociology; APCs were lower than CUP and OUP, but still high (some 1,500 GBP), offered a waiver system for developing countries. Although scientific quality and impact in case of CUP and OUP were high and middle in BUP, high APCs reduced inclusiveness, and in general there was no clear and professional OA strategy.

**Recommendation:** not prioritize this option.

### **2.2 Option 2: commercial publishers**

We analyzed structure and strategy of Wiley and Springer, T&F and SAGE. In its full open access segment, Wiley offers two journals in Sociology, one of which with high Impact Factor. Wiley has – in comparison to the other commercial publishers – the highest APCs. Springer hosts a large body of open access journals, seven of which are relevant for sociology (3 of which have an IF). At Springer, journals are often affiliated with an organization/university that covers the APCs. APCs are generally at the lower end. However, the committee observed a decline in academic quality in recent years and increasingly unsatisfactory (editorial) services. T&F has seven full open access journals in the social sciences, three of which with an Impact factor. APCs are in mid-range. Aside from “traditional” open access journals,

T&F additionally offers the “Cogent”-Series (a service similar to Frontiers or MDPI) and F1000, a fully integrated publication platform for organizations, university and other institutions. T&F, in comparison, thus seems to have the most comprehensive Open Access strategy and also an orientation towards (technical) innovation. SAGE has a very strong portfolio in sociology – 4 of its 7 journals have a (considerable) IF. APCs vary extremely from journal to journal, mostly reach up to 1,500 USD (still at the lower end of the spectrum). SAGE also has a cooperation with ASA to host “Socius” – lower APCs at Socius (ranging from 0 USD (international associate, waived) to 700 USD (non-member)). SAGE shows commitment in the Open Access transformation, e.g., launch of a new publication streamlining portal to improve author services. Furthermore we observed that some journals, formerly hosted by university presses, moved to SAGE recently.

**Recommendation:** negotiate with SAGE and T&F.

### 2.3 Option 3: new OA publishers

We analyzed structure and strategy of Frontiers and MDPI. Both services specialized on open access publishing. Both have grown considerably in recent years, with annual growth rates of the number of published articles at around 30%. MDPI and Frontiers comparative advantages are mainly speed and acceptance rates. For instance, MDPI has an acceptance rate of more than 40%, while publishing articles within a period of 35 days (median, from first submission to publication). Both are mainly active in the natural sciences – MDPI only hosts a single journal “Social Science”, which includes any disciplines related to Social Science (e.g., criminology, economics, social policy, sociology etc.). Frontiers has three journals in the social sciences (including “Frontiers in Sociology”). Both APCs are very low (450-900 USD in Frontiers and 1200 CHF in MDPI). While MDPI and Frontiers cannot be considered “predatory”, they were accused of publishing pseudoscience and/or papers of insufficient quality multiple times.

**Recommendation:** not prioritize this option.

### 2.4 Option 4: non-profit scientific institution docking

We analyzed structure and strategies of Universities of Berlin (Free University), Edinburgh, and EUI Florence. Mainly, those services are based on the software “Open Journal Systems” (OJS). Examples for this solution are the FU Berlin and the University of Edinburgh (hosting 30, and respectively 20 journals). For instance, the FU Berlin provides hosting, workshops, measures to increase visibility and design – for externals it does *not* provide long term archiving, registration of web addresses, set-up of security certificates, and other library services.

Further options for university library docking to check in detail could be:

<https://www.gesis.org/ssoar/home>

EUI Florence has an advanced repository system (Cadmus) and also their own specialized web services “EUI web service”. The journal “European Journal of Legal Studies” is also docked there (has IF). However, EUI explicitly states that they only provide their web services to researchers of EUI or projects affiliated with EUI. Generally the next committee should check with universities whether they offer their OA services to externals (for example, the University Vienna, the University of Heidelberg, LMU Munich and the University of Valencia – all of which provide a rich OA journal portfolio, but exclude externals). Following an OA expert from the library of Ruhr-University Bochum, regardless of the fact that journals with institutional docking rather have low impacts at the moment, their impacts are growing. Aside from hosting itself, ESA would have to engage in rather costly promotion activities to increase the visibility and maintain the impact of its journals. Due to the rotation of editors and the overall fragility of ESA’s organizational policies, ESA would also have to engage very thoroughly in knowledge management to guarantee stability and sustainability of its journals. This, aside from financial considerations, thus entails organizational risks for ESA overall.<sup>13</sup>

Besides direct university docking, there are some further interesting options:

<https://www.openedition.org/> (French OA hosting service with over 500 journals)

<https://plos.org/> (PLOS is (so far) strong in the natural sciences. However, it is worth to observe their strategies and reach (e.g., for new business models).

**Recommendation:** calculate specifically costs of professional infrastructure.

In sum, given the increasing complexity and dynamics of journal publication and the specific conditions of ES and EJCPS as associational journals, where Executive Committees and editors rotate a lot, ESA should either choose option 2 to go on with a high quality professional publisher experienced in social science and sociological journals or choose option 4 to extent (and calculate the costs of) its professional publication staff.

### **3. Pros and cons of options 2 (commercial publisher) and 4 (non-profit scientific institution docking)**

Referring to our criteria (section 1), scientific quality and inclusiveness/transparency could be reached with both options. Editorial professionalism and financial sustainability could be problematic and depend on specific negotiations. Given the many newly establishing non-

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<sup>13</sup> For more background information, we recommend to visit [oaspa.org](http://oaspa.org) (for background information on OA in general and an overview on the latest Open Access developments) and [pkp.sfu.ca](http://pkp.sfu.ca) (for information on [PKP’s OJS System and for an overview of OJS partner universities and institutions](#))

profit OA initiatives, high competition between commercial publishers and ongoing APC policies of many countries, there are currently windows of opportunity for negotiations especially with commercial publishers.

On the one hand, ESA and its journals should be as independent as possible, on the other hand, ESA should exploit the opportunities of APC policies. By this, using public funding of APCs (by PlanS or other initiatives) could be used for improving access for authors of countries without APC policies (e.g. by defining a waiver system to use a share of incoming APCs for granting free OA articles for other countries).

As general recommendations, we propose that the next ExeC should

- evaluate carefully specific experiences of social science journals transiting to OA,
- review a third or further OA journals of ESA based on very specific proposals that are rooted in very active RNs and that would not cannibalize the already existing journals,
- calculate very carefully the actual costs of the different options under the criteria that ESA aims at using additional money that comes from journals for the only purpose to develop its publication activities
- to use specific alternative models of option 4 as leverage in negotiations with T&F or other commercial publishers.

#### **4. Broader publication strategy of ESA**

Besides the future of our 2 journals ESA should precise policies concerning OA book publishing and the magazine *The European Sociologist*. As already mentioned above, some of the OA options for the 2 journals would include a possible full OA platform strategy. This has to be considered for the publication strategy in the medium run.

ESA's publishing strategy concerning **books** should be handled as secondary priority. As book publishing also shifts – at least in part – towards OA, ESA should not define a specific print strategy but first decide on the journals' OA strategy and consider books afterwards or negotiate it as part of a package (e.g. in case of OA platforms).

ESA's magazine **The European Sociologist** (TES) is the free newsletter for members and other interested persons. It serves as internal news exchange and as platform for debates related to professional issues of our discipline. It should be considered, how TES could more directly exploit the means and channels of social media for promoting our association and its 2 OA journals (given that e.g. Altmetrics increasingly come in play).

## **Annex 2:**

### **Message of the Chair of Publication Committee, May 2020**

#### **Signing an Addendum to our Publishing Agreement with T&F**

Dear members of the PC and of the ExeC.

After many months of deliberation in the PC and hard negotiations with T&F we now are able to find a way out of a complex situation that all of us came across with when we began our work in August 2019. Please find attached an Addendum to our Publishing Agreement with T&F concerning our two journals ES and EJCPs and revise it carefully. I ask you to approve it so that the ExeC as a whole, when revising it, has a clear recommendation to accept it and our President could sign it.

#### **History of the Addendum**

When we as ExeC elected and as PC began our work in Manchester we inherited a complex situation. On the one hand side the result of a tender for a new publishing contract and for a new third fully Open Access Journal were announced. On the other hand we had a binding contract with T&F, and our contract partner was not willing to finish this but only under the conditions that ESA would have to pay almost hundred thousand Euros. From the very beginning it came out that ESA could not pay such an amount without putting at risk its own existence. The ExeC and especially its Financial Committee made strong efforts to clarify the financial situation, at the same time our President and me as Chair of the PC began negotiations with T&F.

Based on the mandate of the ExeC, which was defined in our first meeting in Paris in October 2019, we had a first meeting in December 2019 in London. We verified that T&F was not willing to finish the contract but only under the conditions communicated with the former ExeC. Therefore we tried to reestablish a certain level of trust but, at the same time, to negotiate hard aiming at finishing the current Publishing Agreement without having to pay an amount of money that would endanger our association. After the December meeting with T&F in London, on December 20th 2019 we sent an email to BUP explaining the result of that negotiation, that current contractual conditions bind us to continue our collaboration with T&F until 2023 because we were not able to pay the amount they required us. We also told them that we were looking forward to discussing further future possible collaborations.

As outcome of our London meeting T&F in a letter of **27.01.2020** offered a Renewal of our Publishing Agreement with basically five points: (1) renewal of contract for five years with a brake option after three years, (2) raise royalties from 20 to 30 percent, (3) name a specific amount in clause 14 that ESA would have to pay in case of ending the contract after three years (that would be December 2023), (4) define a specific schedule to improve collaboration, and (5) defining a new 'joined-up-solution' for the case that ESA would opt for opening a new OAJ. In this letter T&F announced a deadline for contract negotiations for end of April given that beginning May the publisher sends new pricing lists and subscription renewals to all its customers. If our journals should be included in pricing lists and bundles, we would have to come to an agreement until end of April.



On 30.01.2020 I sent the T&F letter to all members of the PC. In February the PC evaluated the proposals, held meetings with the editors of our journals and asked for legal advice. On 19.02.2020 our legal adviser wrote: "Our advice is there is an arguable case that ESA is bound to proceed to contract with BUP but not whilst they are still contracted to T&F. There is uncertainty around what obligations there are on ESA in relation to extricating itself from the arrangements with T&F". On **21.02.2020** I sent a summary of the situation to the PC and summarized: "The contract with T&F should be finished for the 2 existing journals in 2022". In a meeting of the PC on **06.03.2020** we decided (1) not to accept the T&F proposal, (2) to aim at extending the contract with T&F until Dec. 2023, (3) for this case to try to pay the lowest amount of money possible or even without having to pay any money to T&F, (4) to renegotiate royalties and raising their amount to what T&F had offered in the tender, and (5) to specify our publishing strategy for ES, EJCS and a possible new OAJ.

Together with our President and our legal adviser we prepared letters to T&F and to BUP in order to minimize legal risks, and at end of March we organized again meetings of the PC with the journal editors (separate) for integrating them in the deliberation. The proposal of our legal advisor of **07.04.2020** for the letter to send to T&F formulated three options to present to T&F: "One is to challenge the enforceability of the clause 14 penalty altogether, enabling us to then move to a new publisher after 2020 without penalty. The second is to allow the termination to take effect in December 2020 and not to move to a new publisher until after 2023 (ESA will publish in-house). The third option is to agree terms by which ESA stays with T & F for an extended period beyond December 2020." Our President sent a letter to T&F in this sense the same day 07.04.2020.

In order to prepare further negotiations with T&F we held a joint meeting of the PC with the editors on 20.04.2020. We discussed the three options and the PC introduced a fourth option to evaluate in the talks with T&F that would be to finish the contract in Dec. 2020 and to offer an amount of maximum 40,000 Euro. This In a video meeting of our President, me as Chair of PC and Dagmar as ESA Director with T&F on **24.04.2020** all relevant points were discussed. There was no chance to negotiate about finishing the contract at an amount that would be affordable for ESA. The negotiations concentrated on an Addendum to the existing Publishing Agreement. We insisted in all points established in the PC meeting of 07.04.2020. Our own and the minutes of T&F were circulated to the PC on **27.04.2020**. On the same day I forwarded a proposal for an Addendum that we received that day. The main points were (1) to **extend the current Publishing Agreement for only three years**, (2) to open the possibility to **end the contract in Dec. 2023 by a formal notice until Dec. 2022**, (3) **not to have to pay any amount of money for handing over all necessary information and material from T&F to ESA** and (4) to switch from guaranteed editorial expenses and twenty percent of royalties to a **royalty payment of fifty percent**.

In just very few days of the last week of April the Financial Committee calculated the monetary aspects of that proposal (I very much appreciate the hard work of Teresa Consoli and all members of the Financial Committee for their hard work!), the legal adviser checked the legal aspects of that proposal (that also was a very fast response!) and all members of the PC scrutinized the proposal. We had a PC meeting and later on a meeting with T&F on

30.04.2020 and can now submit a solution to the complex situation we found in August last year.

### **Evaluation of the Addendum**

With the Addendum **ESA recovers sovereignty over its publication strategy**. We have a period until Dec. 2022 to decide either finishing the contract with T&F for Dec. 2023 or to renegotiate a new one. We are free in developing our strategy concerning a possible third journal. We have no additional financial commitments whatever we decide in this respect.

The main **risk** of the Addendum is the **sharing of fifty percent of royalties** because now there is no guaranteed income from the journals for ESA. In the best case ESA will receive more revenues than until now. Probably ESA will maintain or slightly raise its income from the journals. In the worst case ESA will receive less money than in 2019. T&F minimized its financial risks and might lose interest in the journals due to making less money with them. On the other hand, the publisher now is more committed to cooperate in order to raise the probability of further cooperation with ESA.

There are many points that would have to be fine-tuned in a more specific way if we were in a classroom of a Master course of contract law. E.g. the data protection issues were only marginally mentioned in the Publishing Agreement and now were only marginally touched in the Addendum. But as we are in situation of real life, we have to take a well-informed, profoundly deliberated and pragmatic decision.

Much of the future risks and its probabilities will depend on ESA, its publication strategy and strong cooperation with the editors. Not only Corona puts in turbulent times our conference incomes but also the shifting conditions of Open Access and restructuring of reading habits and publishing strategies.

The current situation and option of accepting the Addendum is based on a **highly transparent and active process of engaged communication and efforts of the whole ExeC and its PC**. Analyzing the frequency of email sending, of interchanging documents, of organizing meetings, of asking for external advice and judging the intensity and often also controversy of our discussions in the PC my impression is that we now are at a very good point to take a decision. I would like to thank especially our President, Marta, who was very engaged in all the process and the Financial Committee for its always fast and efficient responses. I think all members of the PC did their best for the best of our association.

We have a **good result of negotiations that I frankly had not expected half a year ago**. This was possible mainly to the engagement of all of you. With this voting of the Addendum, no 'fraction' or 'group' of the PC or the ExeC is winning or losing, because all of us we mainly act as responsible elected persons in search of the best for ESA. Probably it were actually the complex dynamics of **intra-organizational and inter-organizational bargaining** (Walton/McKersie) that made possible the solution that we now have to decide about. I ask you to accept the Addendum.

Ludger Pries 2<sup>st</sup> of May 2020

## Annex 3

### First Report Chair of Publication Committee 12.05.2020

#### 1. Short Activity Report Nov. 2019 – May 2020

Since our Paris meeting in October 2019 the main tasks and activities of PC were:

##### 1.1 Study and revise the situation and outcome of the tender process, negotiate with T&F:

- a. meeting ESA President and PC Chair with T&F: 13.12.2019
- b. T&F letter end Jan.
- c. PC deliberation in Feb.
- d. consultation with legal adviser, meeting with Zoe Sternberg 24.03.2020
- e. our letter 07.04, meeting with T&F 24.04.2020
- f. PC meeting 30.04, Exec vote 04.05.2020
- g. → Addendum with T&F 05.05.2020

##### 1.2 Revise OA development dynamics and strategies, PlanS etc. → draft papers but no defined strategy (see papers attached Annex 3.1 and Annex 3.2)

##### 1.3 Strengthen communication with editors from ES and EJCPS:

- a. meetings/talks in Nov. 2019
- b. questions sent Jan. 2020
- c. meetings Mar. 2020
- d. meetings Apr. 2020

##### 1.4 PC (video) meetings:

- e. 15.11.2019
- f. email coordination Feb. 2020,
- g. 06.03.2020
- h. 27.03.2020 with ES and EJCPS,
- i. 20.04.2020 with editors,
- j. 30.04.2020

## **2. Points for ExeC meeting 14<sup>th</sup> and 15<sup>th</sup> of May 2020 (to comment and decide in yellow)**

### **2.1 General publication strategy of ESA**

- 2.1.1 OA strategy goals: low or no financial barriers for readers, low or no financial barriers for authors; hybrid strategy for 2 journals for next 3 years
- 2.1.2 New third journal, criteria: have clear genuine unique selling points as compared to ES and EJCPS, not going to compete fully with ES concerning authors or readers, be financially self-sustaining after a max. period of 2-4 years
- 2.1.3 Book series
- 2.1.4 Promotion and consultation with RNs
- 2.1.5 Mid-term publisher strategy: general strategy until spring 2021, institutional embedding (same or new publisher, no publisher/ESA hosting, hosting by recognized European academic institution etc.)
- 2.1.6 Should/could journals generate which amount of net income or expenditure for ESA?

### **2.2 Interchange/communication with journals**

- 2.2.1 Strategy of quality, impact, readership, submissions/accepted articles rate, financing
- 2.2.2 Norms and transparency of review process etc. formalized norms
- 2.2.3 OA strategy
- 2.2.4 Website promotion – on ESA-website and T&F
- 2.2.5 **Editor(s) ES: when to elect new editor?** No editorial board renovation since 2015, no Chair of editorial board; associate editors assigned and renewed by editor, only full papers and book reviews, perhaps early career section; specific deontology
- 2.2.6 Editors EJCPS: no Chair of editorial board; no intervention of editorial board in editors' recruitment; full papers, review essays, book reviews; "managing editor" and its financing

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## **3. Annex 3.1**

### **Comments on ESA's Open access journal strategy 03.10.2019**

Referring to the proposal of Sue Scott and Lena Näre of Sept. 2019/Ludger Pries

#### **3.1 Aims/goals**

ES is a well-established sociological journal. It could develop its readership outside Europe and its impact factors. EJCPS still has much potential. A new OA journal should aim at high quality, full peer-review, global impact and not compete with ES and EJCPS but differ from both and seek to create win-win-dynamics.

In order to reach high global – not only European – impact the journal project has to specify and fine-tune its approach and publication strategy. Proposals in point 1. are too general.

### **3.2 Title, topics and unique selling points**

The proposed title “Open Sociology” is quite ‘open’, associates a liberal approach like ‘open society’. It is not attracting attention and expressing a focus as needed for the 3<sup>rd</sup> decade of the 21<sup>st</sup> century. Quality and impact require an at the edge focus with unique selling points and – if possible – a genuine European touch for establishing the journal in a first decade. Examples of foci and names: global(izing) societies, transnational social spaces, diversities and belongings, actors in social circles etc. Specific European experiences and assets should be identified (e.g. founding countries of sociology as scientific discipline, conflict and cooperation in diversity and cohesion, imperial-colonial-fascist regimes and their transformation). Point 2 remains weak.

### **3.3 Publishing strategy**

Different strategies should be considered as (1) hosting the journal as a single project with an established professional publisher, (2) negotiating the journal in a package with ES and EJCPS with a professional publisher, (3) hosting the journal as a single project with an academic institution (CEU-Budapest-Vienna, EUI-Florence, Leuven-Belgium, Uni-Strasbourg etc.) or (4) hosting the journal as a single project with a new professional OA publisher, etc.

Coherent 2-3 alternative solutions with pros and cons in academic, management, risk and financial terms should be elaborated. Therefore, the alternative offers of the tender of beginning 2019 have to be circulated and a working group should prepare a synopsis to be discussed in the EC.

### **3.4 Consultations and decision making**

The alternatives to elaborate should be transparent for and consulted intensively in EC and during a due limited time with RNs and NAs – this is crucial to get the right embedding and support. Editors should be assigned by EC after consultation according to criteria of professional record and international recognition. It would have a taste of ‘vested interests’ if only one proposal would be developed by a group of self-proposing editors. Editors of ES and EJCPS must be involved in the process.

### **3.5 Next steps**

Build a working group, study and revise former tender and all proposals, integrate editors from ES and EJCPS (2 months), developing 2-4 alternatives (2 months), discussing the alternatives in a workshop of EC with invited experts (spring 2020), consultation with RNs and NAs (2 months), decision of EC summer 2020.

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## **4. Annex 3.2**

### **Statement/input concerning a new OA Journal for ESA (Ludger Pries – Feb. 2020)**

#### **4.1 General remarks**

In general, there could be place and opportunity for a third, a fully OA journal (OAJ) owing to ESA. Although currently there is a multiplicity of new OAJ (of any type: commercial, mixt, purely institutionally embedded) and many corresponding plans and efforts, ESA has the unique opportunity to rely on its membership as readers and authors, but also on an international interest on the European societal way and corresponding sociological research in the global context.

Besides these opportunities, there exists the risks (1) that the new OAJ prospers in detriment of the 2 existing journals (detracting readers and authors), (2) that the new OAJ does not damage directly the 2 journals but will not be as successful as necessary for legitimizing the efforts, (3) that the new OAJ will have unexpected economic and labor costs.

The only way to control these risks is to develop a precise and sharp strategy concerning content, readership, potential authors, quality, impact, management and financing. A third new full OAJ should

1. have clear genuine unique selling points as compared to ES and EJCPS,
2. not substantially compete with ES and EJCPS concerning authors or readers,
3. be financially self-sustaining after a max. period of 2-5 years.

#### **4.2 Title, topics and unique selling points (USP)**

Quality and impact require an at the edge focus with unique selling points and – as an ESA publication – a genuine European touch for establishing the journal. In order not to compete and cannibalize with ES, the USP could be a global perspective on social and societal challenges on the background

(1) of specific traditions of European sociological thinking (as crucial region where Sociology as a discipline developed with many European countries with genuine traditions),

(2) of specific experiences of and in European societies and of and in a European society in the making (specific societal experiences with conflict and cooperation in diversity and cohesion, imperial-colonial-fascist regimes and their transformation, momentums of integration and negotiations in diversity) and

(3) of more macro-regional and transnational comparisons in spite of classic inter-national comparisons (e.g. Europe compared to Latin America or North America or Middle East or North Africa or Sub-Saharan Africa or China or South-East Asia etc.).

Emphasis could be on innovative societal developments, experiments and solutions in the line of sociological imagination and Berger/Kellner: “Not only is the world what it appears to be, but it could be different from what it is.” Such a line should be based on substantial theoretical and empirical innovation and always try to apply a macro-regional comparative perspective. Scientific debates could focus e.g. on the societal options and experiences of (neo)liberal market-economy-driven societal models (e.g. Anglo-Saxon), state-driven collectivist societal models (e.g. Asia) and an institutionally embedded and socially negotiated societal model (e.g. Europe).

### 4.3 Publishing strategy

As publishing strategy ESA should evaluate to host the journal as a full OAJ with an outstanding and recognized academic publisher (like Amsterdam University Press or transcript Verlag) or with a European academic institution (like EUI-Florence, University Leuven-Belgium, University Strasbourg etc.). ESA has to be owner of the OAJ. As full gold standard OAJ, its financing should be guaranteed by APCs from PlanS countries and perhaps richer OECD countries. ESA could invest limited amounts during the first 3 to 5 years.

The name should mainly stress and reflect not the OA character (as Open Sociology etc.) – because this will do many journals during the next years – but the USP of the journal, e.g. Societies Open Future. Concerning the launch of “global networks” in 2000 (<https://onlinelibrary.wiley.com/page/journal/14710374/homepage/productinformation.html>), one of the most successful stories ever, Robin Cohen (cofounder with Steven Vertovec) wrote: “Our take on networks was essentially Clyde Mitchell and Manuel Castells. So what was surprising is that we became a place where global care/commodity chains and other ways of understanding/using networks could find a place.”

The journal should publish continually (not in issues) and perhaps one annual special issue. It should search for authors and readers mainly globally. At the beginning, the journal should look for a good mix of high profile authors (who bring attention and citations) and innovative shooting stars and younger academics. Concerning editors, we also should look for a mix of a high profile scientist (with outstanding citation records and very good knowledge about Sociology in the Americas, Africa and/or Asia) and a promising ‘shooting star’.

### 4.4 Former tender and existing proposal of members of former ExeC

There exists a proposal for a new OAJ handed in by Sue Scott and Lena Nare in Sept. 2019. The therein-proposed name “Open Sociology” – to my knowledge – was mentioned first in the T&F tender of Feb. 2019. The proposal does not specify a thematic profile but states “Open Sociology will be rooted strongly in the discipline of sociology. We do not exclude any themes or subject areas as long as the research is high-quality in academic standards.” The proposal aims at a “globally wide audience amongst sociologists and researchers in related fields”, but does not specify how to do this in relation to the existing journals. It claims “Contributors would choose Open Sociology for its European-wide focus, for its intention to publish the best, cutting-edge research in English in Open Access format, some of which may previously have been published in another language.” This regional approach is contradicting the global scope mentioned before – there is no specific profile of content, readership and authors that could prevent disadvantaging the 2 existing journals.

The proposal/tender of BUP is very weak in all aspects mentioned before. Besides Brexit-uncertainty, BUP might be interested in the OAJ, but its impact in Sociology is quite low. Searching in “Harzings Publish or Perish” for BUP and sociology delivers an h-index of 10 and a g-index of 16, as compared to e.g. Amsterdam University Press (h-index 65, g-index 126) or transcript verlag Bielefeld (h-index 52, g-index 101) or sciences po (h-index 33, g-index 80).

### 4.5 Summary/next steps

1. New OAJ could be an initiative; in any case we must include the editors of both existing journals in our deliberation and define a very precise and sharp profile in

topic/orientation, readership and authors. During the next 3 years, both existing journals should develop to full hybrid journals.

2. The contract with T&F should be finished for the 2 existing journals in 2022, looking for either a joint 'harbor' for all 2-3 journals or different institutional embedding according to point 3.
3. We should evaluate options with either high impact European publishers or institutional embedding in high ranked European institutions.



## Annex 4

### Report on activities of the PC of ESA-Exec period May to November 2020

#### 1. Short activity report

The PC met 3 times in extensive session: June 15<sup>th</sup>, July 3<sup>rd</sup>, and Sept. 25<sup>th</sup>.

After the successful voting and signing of the Addendum to the Publishing Agreement with T&F in May this year the PC concentrated on differentiating and deepening the discussion about the **future of our 2 journals, improving the dialogue with the Editors and developing the cooperation with T&F.**

In its **first session** on June 15<sup>th</sup> the PC, jointly with the Editors of our journals, discussed in more detail the situation of the 2 journals and elements of a general publication strategy of ESA (see preparatory paper [Annex 4.1](#) and minutes [Annex 4.2](#)).

The **second meeting** was organized jointly with T&F, we discussed OA strategies in general and the current situation of our 2 journals (see [Annex 4.3](#) and [Annex 4.4](#)). We learned that most economically driven publishers like T&F try to maintain hybrid journals as long as possible for double income generation from subscriptions and APCs. In contrast to that, the general political and sponsorship environment in EU and globally is to promote full OA.

Based on the discussion with T&F and a proposal of a “Development Plan for ES and EJCS” prepared by T&F, in its **third session** in September the PC discussed and fine-tuned criteria for ESA’s publication strategy (see [Annex 4.5](#) and [Annex 4.6](#)). According to these criteria a more specific analysis of pros and cons of the four general options was elaborated (see Annex 7) and talks with different related experts and addressees (see point 2).

Based on our decision in ExeC meeting of May 2020 the PC elaborated and discussed a **call for the new editorial team of ES** that should take over responsibilities beginning the second half of 2021 (see [Annex 4.7](#)).

Besides the PC meetings and related activities, a new **Data Processing Addendum with T&F** was negotiated and signed by our President (see [Annex 4.8](#)).

#### 2. Options for and future of our 2 journals

Together with a research assistant (Rafael Bohlen) I checked the pros and cons of the four strategic options that we discussed in our last meeting (see document “ESA-publications-strategy-2021”), and we prepared the attached file (see “**OA-short-overview-2.xlsx**”). I have the following observations, that came out of the review:

**Option “university publishers”** is good in terms of professionalism and quality (with minor experiences of BUP in the field of sociology) and in the case of some journals of impact factor, but internal and external inclusiveness is moderate due to relatively high APCs and/or hybrid strategies of access. In our quantification it ranks very **good**.

**Option “specialized OA services”** is good in terms of lean and fast processes and inclusiveness, but (still?) weak in scientific impact and debatable in terms of (sociological) professionalism and expertise and quality policies. In our quantification it ranks **moderate**.

**Option “large publishers”** is good in terms of quality, scientific impact and (sociological) expertise and professionalism, but moderate in terms of inclusiveness (as oriented in hybrid strategies). In our quantification it ranks **highest**.

**Option “independent consortium”** is **very good** in terms of **inclusiveness** but challenging in all other aspects; it could have substantial growth options in the future; much depends on the specific place to berth and anchor. As publications of a huge professional association, our journals would have some **specific and unique advantages** for such an option, but it would be also a **risky option** where we would have to act and manage with caution.

Additionally to this desktop research, we had conversations with specialists of libraries of some universities, with researchers at EUI/Florence, and with members of publishing houses. Our president, Marta Gallart, had talks with SAGE, MDPI and contacted BUP. I contacted Springer and Wiley.

In our ExeC meeting we should discuss about the four options and, based on that, use the next 2-4 months to **evaluate all options and possibilities**. We should also work hard **improving the metrics of our journals** in order to make them more attractive for publishers.

### **3. Specific tasks until end of first half of 2021**

- Promote the call for a new Editor of ES and organize related talks
- Organize meetings with T&F and the Editors to learn, train and prepare for full OA
- Talk with experts and addressees of all 4 options for our journals
- Organize a survey of our membership on preferences concerning criteria for journals and the 4 options
- Improve specific metrics of our journals in short term: relation submitted to accepted papers 4:1; time period from submitting to acceptance/rejection (6 weeks); download rate of articles etc. – therefore we have to mobilize our association and its RNs

Ludger Pries, November 6<sup>th</sup> of 2020

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#### **Annex 4.1**

##### **Points for PC meeting 15<sup>th</sup> of June 2020/Ludger Pries**

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### 1. Situation of and strategy for our 2 journals

	ES	EJCPS
<b>Quality</b>		
Incoming papers	Average to good	Mixed
Accepted papers	good	By and large excellent
subm/acc rate	73/19 (26%) 1 year to 2/2020 → index?	2019: 10/5 (33%) → Acad.Accel.
time subm-acc	∅ 10 weeks	? see T&F report → own statistic!?
reviewers	Selected by associate editors, 4 norms	Hard to find, 1 edit. resp.+decid., 2 rev.
citescore	SJR 2018: 0.45, 2019: 0.47 JCR 2018: 0.902, 2019: 1.27	SJR* 2018: 0.33, 2019: 0.8 → Index status?
<b>Readers</b>		
Online sales	2015: 2,184, 2018: 2,887	2015: 2,522, 2018: 148 → bundles!?
Subscriptions	2015: 91, 2018: 63	2015: 98, 2018: 70 → no future?
Full text downloads	2018: 49,000	2015: 5,843, 2018: 10,771
Regional distrib	67% NSCE-Europe; 13% North America, 12% Asia/Austr. → potential out Eur	2018: 34% NSCE-Europe, 28% North America, 24% Asia/Austr.
Reg distr institutions	Scandinavia, Netherlands, UK, GER	Erasmus, Scandinavia, UK → prom!?
<b>Authors/media pres</b>		
Status of authors		
Regional distrib auth	CS-Europe – balanced	Decentralizing from Scandinavia
Media presence		innovative work of Linda Haapajärvi
<b>Article types</b>		Full papers + book reviews
<b>Org.structure</b>		
	One editor + 1 edit. Assistant 8 associate editors (2 years in charge)	3 editors, Linda Haapajärvi manag.ed.

	<p>12 editorial board 6 editorial advisory board</p> <p><b>Assign new editor in 2021:</b> international experience, open minded, people who published in the journal, quality</p>	<p>Developing role of editorial board in our long-term agenda</p>
<b>Experience with publisher</b>	<p>“Like other publishers, T&amp;F are essentially rentiers on our efforts. I do not have any specific complaints if we look at the issue from a comparative point of view. Of course, I have a long list of things that I would like every publisher to do in an ideal world but that is a different matter. I believe moving to another publisher would make sense only as a very significant prestige upgrade. In all other cases, I believe staying with T&amp;F makes sense ... I must say I have never seen our contract with T&amp;F neither any data on our royalties”</p>	<p>“been disastrously neglectful with regard to the Emerging Sources Index” “not had any substantial discussions with T&amp;F”</p>
<b>Challenges</b>		<p>Index status/impact factor Higher quality submissions</p>
<b>Strategies</b>	<p>For review process: no (associated) editor can publish, no inhouse-reviews/no standard pool, specialized reviewers, protect early careers against not acknowledged senior authors “We are too inert ... in terms of communication and promotion. Publishers (in general, not only Routledge) do not do much in that area, ... establish their specific "brands" will do well in the new landscape. We have potential in that area as an <b>association journal</b>. ... strengths ... opening towards the East and the South of Europe ... increasing author/reviewer sharing with reputed competing journals... our good reputation as an inclusive journal.”</p>	<p><b>No review discussion?</b> <b>Strengthen relation to RN CPS → EceC</b> <b>ESA board members write reviews?!</b> <b>Editors “buy time from universities” !?</b></p>
<b>OA strategy</b>	<p>in Europe the possibility for independent journal, built on national associations, attract persons who don't have the funds for APCs</p>	<p>pursuing OA to the extent it is feasible</p>

	“no print, Open Access, own URL also accessible via that of the ESA) <b>special issue COVID as OAJ?</b>	
<b>New third journal?</b>	Only as subdisciplinary journal e.g. bio-sociology, or early career section in ES; “open access "European Societies - Early Career" with acceptable quality articles and dedicated Associate Editor; “a new OAJ would be likely to confuse everyone and damage both ES and the ESA” Was not involved in tender, its criteria	It’s not obvious why this should be needed or what its remit would be; as long as the new Open Access journal does not detract from submissions to ES and EJCPS
<b>Budget</b>	600€/month for assistant	12,000€ in 2019 ( <b>low?</b> ); not to pay for translations, not to fund symposia <b>finances of journal in future be determined based on what ESA is receiving?</b>

\* According to editors in Jan/Feb and May 2020; <https://www.scimagojr.com>; <https://academic-accelerator.com> and <https://www.scopus.com>; \* SCImago Journal Rank (SJR) expresses the average number of weighted citations received in a given year by the documents published in the journal in the three previous years. JCR: Journal Citation Report

## 2. General publication strategy of ESA

### 2.1 OA context in general

#### 2.1.1 cOAlition S

“With effect from 2021\*, all scholarly publications on the results from research funded by public or private grants provided by national, regional and international research councils and funding bodies, must be published in Open Access Journals, on Open Access Platforms, or made immediately available through Open Access Repositories without embargo.” \*For funders agreeing after January 2020 to implement Plan S in their policies, the start date will be one year from that agreement: cOAlition S Guidance: <https://www.coalition-s.org/addendum-to-the-coalition-s-guidance-on-the-implementation-of-plan-s/>

study to explore collaborative non-commercial Open Access publishing models for Open Access, results of tender 9.6.2020, study until end 2020: <https://www.coalition-s.org/exploring-collaborative-non-commercial-publishing-models-for-open-access-tender-results/>

price transparency requirements for July 2022: <https://www.coalition-s.org/coalition-s-announces-price-transparency-requirements/>

Transformative Journal status: ““Recognising that a fundamental principle of these transformative arrangements is that they are temporary and transitional, where cOAlition S members provide funding to support publication fees of journals covered by such arrangements, this funding will cease on the 31 December 2024” <https://www.coalition-s.org/transformative-journals-faq/> and <https://www.coalition-s.org/tj-forms/>

## Members of Plan S

- [Austria: Austrian Science Fund](#);
- [Finland: Academy of Finland](#);<sup>[13]</sup>
- France: [Agence nationale de la recherche](#);
- Ireland: [Science Foundation Ireland](#);
- Italy: [Istituto Nazionale di Fisica Nucleare](#);
- [Luxembourg: Luxembourg National Research Fund](#) [1b];
- [Netherlands: Netherlands Organisation for Scientific Research](#);
- [Norway: Research Council of Norway](#);
- [Poland: National Science Centre](#);
- [Slovenia: Slovenian Research Agency](#) [s];
- Sweden: [Swedish Research Council for Sustainable Development \(Formas\)](#) [sv]; [Swedish Research Council for Health, Working Life and Welfare \(Forte\)](#);<sup>[12]</sup>  
[Vinnova](#).<sup>[14]</sup>
- [Jordan](#):<sup>[15]</sup> [Higher Council for Science and Technology](#)<sup>[16][17]</sup>
- United Kingdom: [United Kingdom Research and Innovation](#); [Wellcome Trust](#)<sup>[18]</sup>
- United States: [Gates Foundation](#).<sup>[18][19]</sup>
- [Zambia: National Science and Technology Council \(NSTC\)](#)<sup>[20]</sup>

[https://en.wikipedia.org/wiki/Plan\\_S](https://en.wikipedia.org/wiki/Plan_S)

### 2.1.2 EU

EU guidelines for Horizon Europe are not published yet, concerning Horizon 2020, see article 10 and 35.3, probably the new provisions will be similar: <https://data.consilium.europa.eu/doc/document/ST-7942-2019-INIT/en/pdf>

### 2.1.3 other OA initiatives

<https://www.projekt-deal.de/about-deal/>

<https://oa2020.org/mission/#eois>

## 2.2 crucial questions

- amount of fees
- tendency towards concentration, maintaining plurality of publishers or decentralization?
- differentiated effects according to institutional governance structures
- what about countries and authors outside PlanS etc.

## 2.3 OA strategy goals of ESA

### 2.3.1 Leading norms

low or no financial barriers for readers

low or no financial barriers for authors

inclusive high quality scientific journals

journals as part of ESA responsibility of public sociology

journals as more or less self-sustaining ESA activities

what kind of licences? <https://creativecommons.org/about/ccllicenses/>

### **2.3.2 issues to decide concerning our 2 existing journals**

Gold standard or green or hybrid journals?

Open review?

Publisher/organization/institutional embedding:

- same or new publisher,
- hosting by recognized European academic institution or university library;
- hosting by consortium like <https://www.ubiquitypress.com/>
- hosting directly by ESA itself or like socius: <https://journals.sagepub.com/home/srd>)

Organizing a tender?

### **2.4 New third journal?**

have clear genuine unique selling points as compared to ES and EJCPS

not going to compete with ES and EJCPS concerning authors or readers

be financially self-sustaining after a period of 2-4 years

having proven interest and support in ESA and its RNs

### **2.5 Book series**

### **2.6 Formalizing norms**

**Partly in cooperation with Policy Committee: organization of boards, time periods etc.**

**review process, selection of reviewers?**

### **2.7 Timeline and participation**

Mid-term publisher strategy: general strategy until spring 2021, institutional embedding (same or new publisher, hosting by recognized European academic institution etc.)

How to organize deliberation process in ESA: promotion and consultation with RNs, survey of all members?

## **3. Points for meeting with T&F Friday 3<sup>rd</sup> of July (?)**

### **2.1 Data flow**

Reports in August 2020 for 2019 – how to accelerate information sharing?

Why use of different indices for ES and EJPCS? JCR and SJR, e.g. “article downloads (report section 1.3) definitely underestimate the share of Eastern Europe and other regions (accessing via Sci-Hub, direct sharing” (ES)

Suggestions for review process and its transparency?

2.2 OA strategy

special issue COVID as OAJ

increase and systematically invite to OA articles when papers accepted

2.3 Meetings and contact persons

Zoe Sternberg on parental leave July 2020

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## **Annex 4.2**

### **Short minutes of meeting ESA-PC with editors 15.06.2020/Ludger Pries**

We decided to follow the main agenda proposed by LP and discussed extensively the first point “Situation of and strategy for our 2 journals”.

Participants: all members of PC (Maria Carmela Agodi, Paola Borgna, Ligia Ferro, David Inglis, Tiziana Nazio, Irina Tartakovskaja, Ludger Pries) except Sanna Aaltonen plus Marta Soler, Michalis Lianos as editor of ES and Ulrike Vieten and Veikko Eranti as 2 of the 3 editors of EJPCS.

#### **1. Situation of and strategy for our 2 journals**

##### **Quality**

- Michalis Lianos underlined that ESA has to balance between quality and inclusiveness as an ESA journal
- EJPCS now reports more incoming papers, ranging from early career to advanced level writers, a special issue is now being prepared by Donatella della Porta, that double no. issue will probably increase quality and public attention
- In general there is seen a need to invite more cross-national and transnational approaches/perspectives and to include a broader European scenery, ES already made steps forward extending towards Eastern Europe, there still is much potential for growth in this vision of a broader Europe than EU or so
- Concerning the indices and data published either by T&F or in specialized services there is a need to check these and to provide regularly cleaned up and cross-checked data which is a task of the publisher, we need e.g. SJR and JCR and other indicators for both journals in the same fashion by T&F, but should also have somebody (editorial assistants?) to check and clear data

##### **Readers and authors**



- There are substantial differences in regional clustering of individual and institutional readers according to the annual reports: in case of ES 2/3 of readers ES come from Europe, whereas this is only 1/3 in case of EJCPS.
- Departing from a strong clustering of readers in Scandinavia, Netherlands, UK (and Germany for ES), ESA probably could help to promote via its NAs a more balanced attention of scientists over Europe. It has to be seen in the future, if the trend of tending to submit to national journals will be as strong in the future than in the past.
- Concerning authors there is a tendency for ES from central and South Europe towards a more balanced authorship, in case of EJCPS a trend of decentralizing from an initial Scandinavian clustering.
- EJCPS reports very successful promotion via social media, mainly the newly established webpage on Facebook and (increasing now) on Twitter. As this generated substantial new attention to the journal ESA should promote (for both journals) the capacity to develop these communication channels by its own – and not leave it only to the publisher, because it has to be generated scientific communication oriented in the journals and their articles. Editorial assistants should be able and – if necessary – being trained in the corresponding skills.

### **Organizational structure**

- Both journals have quite different organizational structures concerning no. of (associated) editors, editorial board, advisory board, review process and decision making on articles. The role of editorial boards is of minor importance.
- Currently ExeC is reworking the bylaws for ES, those should also be valid for EJCPS. There always are and will be differences between formal rules and social practice, but we should try to balance between both. All editors are invited to make comments and suggestions on the bylaws whose current draft status will be sent to the journals.
- ML underlines the ES policy of strictly differentiating between reviewers/editors and the writers of articles in order to prevent any kind of nepotism or favoritism.

### **Experience with publisher**

- The experiences as documented in the table vary between “regular satisfaction with publisher with pro and cons as with any other publisher” to “very bad experience due to the expulsion of index and bundles.
- Marta Soler and Ludger Pries share what was mentioned in several meetings with publisher to shift from marketing bundles to libraries to negotiate agreements with consortiums of libraries. This makes it more difficult to oversee the actual bundle strategies of T&F.
- As fixed in the new Addendum to our contract with T&F, there shall be defined a publication strategy every year by T&F in deliberation with ESA.

### **Challenges and strategies**

- We discussed the issue of developing transparent review processes as in some occasions related to the general ‘opening’ process, resulting e.g. in fully transparent processes of reviewing where reviewers and their reviews will/shall be made open accessed. EJCPS has one responsible ‘shepherd’ for each article, who decides the 2 reviewers and also acceptance of articles. In case of differing reviews all 3 editors deliberate and decide. In ES the actual decision of acceptance is taken from the reviewers (and associated?) editors.

- There is a challenge of English proof reading when articles come from authors whose first language is not English. In order of quality, ESA should deliberate on that, e.g. in terms of financial planning.

### **OA strategy and new 3<sup>rd</sup> journal**

- The editors of both journals underlined their strategy to go for an OA journal. Editing full OA special issues is a step, raising the share of OA articles another. Ludger Pries presents data concentrated in an Excel file that gathers information about the authors of the last four volumes of ES and checks the APC accessibility of the authors. This could be compared with the actual share of OA articles. It is assumed that publishers do not have much interest in pushing OA because after a first period of double income (by APCs and subscriptions) there now are clear rules to reduce subscription prices in case of APCs. According to Michalis Lianos there are strong efforts of publishers and their associations lobbying for not to go for OA because this would mean losing money for all.
- Concerning a new 3<sup>rd</sup> journal all editors underline that it should not compete with the already existing journals. ES represents a broader focus on general sociology, with a clear reference to Europe. EJCPS has a clear specialized focus on cultural and political issues. Both have a comparative approach. According to Michalis Lianos, a new journal should have a clear thematic 'niche' like bio-sociology. A more generalist journal would confuse with ES.
- OA opportunities should be exploited for offering early career scholars more publication opportunities, e.g. by creating special sections in the journal(s). Michalis Lianos proposes to check if national sociological associations could combine efforts in order to create a new bigger European OA journal.
- Marta Soler shares the experience of the former ExeC: the idea of a new third journal came up when both existing journals did not go toward OA. So now the situation is different as OA is the strategy for them as well. David Inglis proposes to circulate the proposal for that third journal submitted by 2 members of the former ExeC.
- David Inglis proposes to reframe the question from 'What kind of third journal?' to 'Do we want a third journal?' All participants agree that this is a strategic decision that includes also financial aspects as until now both journals generate small but income for ESA. A full OA strategy would mean financial risks in that sense. But a close look at APC options for authors could clarify and calculate more properly such risks (if a certain share of authors is/would be from PlanS countries that guarantee APC payments an independent full OA journal could be feasible).

As many participants of the meeting had other commitments, we decided to leave most of agenda point 2 (OA strategy of ESA in general) for a next meeting in order to prepare crucial points for the meeting with T&F.

## **2. Points for meeting with T&F Friday 3<sup>rd</sup> of July, 14-16h CEST**

The following points should be dealt with in the meeting, although there could arise some more.

## 2.1 Data flow and interchange

- Reporting: until now in August 2020 for 2019: how could we accelerate information sharing? E.g. 2x per year
- Why are there different indices for ES and EJCS in annual reports (like JCR and SJR)? Don't the numbers of e.g. "article downloads" (annual report section 1.3) definitely underestimate the share of Eastern Europe and other regions (accessing via Sci-Hub, direct sharing for ES is higher)
- How could editors' (and perhaps PC members') access to scholar one and the corresponding data of our journals be improved? How could data in scholar one be updated and cleaned up?
- Work on promotion: fully OA special issues, 2 articles in OA guaranteed per issue independently of editors decisions
- What about the model used in technical/medical journals of having secondary publications of articles?
- When and how will we organize our joint meeting editors with publisher that was agreed in the Addendum?
- Are there specific goals/criteria for transparent review processes by T&F?

## 2.2 OA strategy

- ES is preparing a special issue related to COVID-19 as OAJ, EJCS will not prepare a special issue – how could we improve decision making and conditions of such special issues? With its special issue, ES is testing a fast track special issue edition because speed is of increasing importance – how could we guarantee OA to all articles and not only a limited 'green' access for few months?
- How is the specific process to increase and systematically invite to OA articles when papers accepted?

## 2.3 Meetings and contact persons

- Zoe Sternberg on parental leave July 2020, who will be the contact persons then?
- When and how could we organize our meeting with editors?

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### Annex 4.3

#### ESA STRATEGY MEETING

##### AGENDA

Attendees: Ludger Pries, Members of the ESA Publishing Committee, Journal Editors, Matthew Derbyshire, Erato Basea

1. Welcome and introductions 1.00 pm – 1.10 pm

a. Meeting objectives

2. Open Access 1.10 pm – 1.40 pm

a. Definition and options

b. How Routledge facilitates and encourages OA

c. Balancing OA and non-OA content

### 3. The ESA Journals: Review and future plans 1.40 pm – 2.40pm

#### a. ES Special issue on COVID-19

- Publication options
- Process for Special issues

#### b. Publishing report discussion

- Metrics and indices
- Marketing
- Peer review

#### c. Discussion and future plans

### 4. Final discussion 2.40 pm – 3.00 pm

#### a. Future strategy meetings

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## Annex 4.4

Confidential slides and reports by T&F

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## Annex 4.5 (shortened)

*This is a draft to be discussed and finalised by the ESA, the Journal Editors and Routledge, Taylor & Francis.*

Following recent discussions with the European Sociological Association (ESA) and the ESA Journal Editors it has been established that creating an overarching strategy for *European Societies (ES)* and the *European Journal of Cultural and Political Sociology (EJCPS)* is a key priority in the next few years. Below we outline a few suggestions based on our expertise and understanding of the Journals and the publishing landscape.

We recognise, however, that effective publishing strategy for **society journals** comes from the subject knowledge and understanding that Journal Editors bring combined with our expertise. Given that the ultimate decision maker for the journals is the ESA, we see this as a stepping stone for a discussion between the ESA and Routledge about what the Journals portfolio should achieve over the next few years.

We hope that off the back of this document we can agree to a strategy that will fit the Society's aims and identify small, practical steps we can all take to work towards our longer-term plans and agreed goals. We propose to discuss this document and review progress on a bi-annual basis and review overall progress at the end of 2021.

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### MEDIUM-TERM OBJECTIVES:

1. **Quality:** Improve the quality of submitted and accepted articles in both Journals to ensure the continued improvement of the Journals' reputation as significant contributors to Sociology and to subsequently improve the Journals' citation performance and rankings;
2. **Open Access:** Grow the number of high-quality, accepted Open Access articles in both Journals;
3. **ESA Community:** Ensure both Journals are community platforms for the ESA;
4. **Collaboration:** Raise the Journal's profile and reputation through greater collaboration between the ESA, the Editors and Routledge.

**1. Focus on quality to increase the quality of articles, ensure the Journals are the first stop for high quality authors and improve the Journals' citation performance and rankings**

**2. Drive high-quality Open Access submissions to the Journals**

**3. Achieve greater collaboration between the ESA, the Editors and the Publisher**

**4. Ensure both Journals are community platforms for the ESA**

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## Annex 4.6

### Mid-term publication strategy ESA – until end of 2021 (new ExeC and new PC Chair, new editor in 2021)

Ludger Pries for PC discussion/09-2020

#### 1. Starting point

The situation of scientific journals in general, also that of society/association journals like ES and EJCPS, is dynamic and challenging. All over the world there is a trend towards Open Access (OA). New corporate actors like specialized OA services emerged, established publishers shift to hybrid or OA journals, university publishers extend their services. Competition for readers and authors is increasing. Readers expect high quality journals granting OA or easy access via available bundles with fully transparent processes of reviewing and quality management. Authors expect fair (not Matthew oriented), transparent, fast and constructive (substantial feedback) reviewing and accessible financial conditions (no or low APCs).

Especially in Europe and the EU, Plan S and cOAlition S will push for full/gold OA standards.<sup>14</sup>

Distribution and promotion of journals is getting more complex (from subscription in bundles to article promotion via twitter, social media etc.).

As social reality of scientific publishing gets more complex, the same holds for means to reduce such complexity e.g. by impact metrics etc.

Especially in social sciences and sociology there is a need to balance between quantitative and qualitative methods/efforts to measure quality and other goals.<sup>15</sup>

#### 2. Goals and aims of ESA for ES+EJCPS

ESA has to define its main goals for its publication strategy. This relates mainly to the future of the 2 existing journals and, after defining that, to possible additional publication initiatives.

Related to goals for ES and EJCPS, ESA has to balance between (proposal: to rank in the following order):

1. scientific quality (measured by ESA's own mechanisms!?),

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<sup>14</sup> See e.g. <https://www.coalition-s.org/coalition-s-response-to-the-erc-scientific-councils-statement-on-open-access-and-plan-s/>

<sup>15</sup> See e.g. Next-generation metrics - European Commission - Europa EU, report 2017, p. 15f. doi:10.2777/337729. Moed 2020: Moed, H. F. (2020). Appropriate Use of Metrics in Research Assessment of Autonomous Academic Institutions. Scholarly Assessment Reports, 2(1): 1. DOI: <https://doi.org/10.29024/sar.8>; Wouters et al. 2019: <https://op.europa.eu/en/publication-detail/-/publication/b69944d4-01f3-11ea-8c1f-01aa75ed71a1/language-en/format-PDF/source-108756824>; <https://blogs.lse.ac.uk/impactofsocialsciences/2019/12/28/2019-in-review-metrics-and-research-assessment/>; <https://editorresources.taylorandfrancis.com/peersupport/the-use-of-metrics-in-research-assessment/>.

2. accessibility/inclusiveness for readers and authors (gold standard OA, low APCs, quota for non APC-funding countries?),
3. scientific impact (measured by Impact Factor and Citescore),
4. visibility (measured by Altmetric Attention Score),
5. societal impact (measured by citations of journal articles in defined media,
6. financial sustainability for ESA (incoming royalties versus outgoing support)..

### 3. Strategic options for ES+EJCPS

There are basically 4 options for ESA: (1) Established Commercial Publishers, (2) University Publishers, (3) Specialized OA services/publishers, (4) consortium model/European university

Comparing pros and cons (see the Excel list) ESA should deny option (3), and choose between the following pros and cons:

	<b>Pros</b>	<b>Cons</b>
<b>large commercial publishers</b>	professional experience, reputation, strong in hybrid models, royalties  T&F: community platform	necessarily “profit first”
<b>university publishers</b>	academic proximity, dedication	organizational inertia, high APCs
<b>Specialized OA publishers</b>	Fast and dynamic	lack of scientific reputation and knowledge
<b>consortium model/European university</b>	prepared and dedicated to OA, ready to adapt to ESA needs and preferences (e.g. APCs)	Lack of commercial professionalism, reputation

In any case, ESA should develop a specific communication strategy in social media (facebook, twitter, Instagram and alternative services) and other media (videos, podcasts, blogs, ppts).

### 4. Additional third journal?

Additional ESA journals must have a clear unique feature and must not compete with already existing ESA journals. Therefore, there should first be (a) a strong basis in one or some RNs of ESA and (b) a very specific proposal of profile, and (c) a clear model of financing. At this moment, there is no such proposal. ExeC should concentrate on the transition of the 2 existing journals and only act if strong proposals arise out of ESA membership.

ESA could discuss the option of an own book series, but this should be postponed to a new ExeC.

ESA should consider to develop and open TES (The European Sociologist) from an internal newsletter for members to an OA magazine oriented towards a broader audience, especially to decision makers in academic, policy, administration.

Such a broader Magazine could develop a more specific communication strategy in social media (facebook, twitter, Instagram and alternative services) and other media (videos, podcasts, blogs, ppts), that also related to and supports our 2 journals.

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#### **Annex 4.7**

### **Call for expressions of interest in editing the journal *European Societies***

The present Editor of ESA's journal *European Societies* is completing his term of service. ESA therefore is seeking expressions of interest for this position. The new editor or up to three editors (Editor in the following) will take on responsibilities in the course of 2021 (month can be defined). The deadline for **expressions of interest is 30<sup>th</sup> of December 2020**.

*European Societies* is the well-established general sociological journal of ESA:

- It covers all relevant aspects of sociological theory and empirical research.
- It publishes research from every part of the planet on all aspects of social life either related to Europe or in a comparative perspective.
- It welcomes all sociological methods and approaches in sociological theory.
- It focuses on addressing the specific contribution of contemporary European society/societies to a global world, as well as on the serious socioeconomic and socio-political challenges that European societies face.
- It is strictly focused on high quality articles, and therefore prevents favoritism (e.g. editors, board members etc. cannot publish in the journal during their term; young researchers are welcome; 'Matthew effects' should be inhibited).

*European Societies* is a hybrid journal with a strong commitment to increase accessibility for its readers and authors. Given the complex and dynamic current situation of moving towards Open Access, the new Editor will have the opportunity to forge this process in strong cooperation with the Executive Committee of ESA and the publishing company Taylor & Francis. This process of redefining the publication strategy shall be fine-tuned until the end of 2022.

According to ESA's bylaws and custom and practices, the editorial work of *European Societies* could be organized either by one editor or a team of up to three editors. The post of Editor is assigned by ESA for a period of five years. The Editor is supported by an editorial assistant and responsible for (1) developing the general publication strategy jointly with the Executive Committee, especially the Publication Committee of ESA, for (2) organizing the review process of incoming papers and guarantee a regular publication of high quality issues, for (3) developing proposals and organizing special issues and (4) for bridging and bonding with the ESA office in Paris, the publisher and the Editorial Board (<https://www.tandfonline.com/toc/reus20/current>).

The new Editor should take on full responsibilities in the second half of 2021 (after a period of liaising and handing over with the current Editor). Regular activities are mainly:

- invite different types of papers such as full research articles, thematic field overviews, book reviews,
- follow and relate to activities of ESA's Research Networks and invite persons and groups for special issues,
- balance paper submissions and published articles according to different career stages, thematic fields, applied theoretical paradigms and methods, geographical regions,
- attend meetings of the Publications Committee, when invited, and report on the journals activities

Interested persons or teams must have a good command of English language.

Expressions of interest should

- contain up-to-date CVs;
- a summary of experiences and contacts relevant to the editorial work;
- strategic ideas for further developing the journal;
- as the work of Editors is unpaid, possible resources that occasionally could be brought in (e.g. office space, manpower);
- credentials of academic organizations the applicants are working in.

Expressions of interest should be sent to the ESA office ([esa@europeansociology.org](mailto:esa@europeansociology.org)). For any questions, don't hesitate to contact the current Editor of ES (Michalis Lianos, [eusoc@essex.ac.uk](mailto:eusoc@essex.ac.uk)) or the Chair of the ESA Publications Committee ([ludger.pries@rub.de](mailto:ludger.pries@rub.de)).

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## Annex 4.8

### **ADDENDUM 2 TO PUBLISHING AGREEMENT DATA PROCESSING ADDENDUM**

This **ADDENDUM** is made and entered into as of the date of the last signature below by and between:

1. **INFORMA UK LIMITED**, trading as **TAYLOR & FRANCIS GROUP** (registered in England and Wales with company number 01072954) whose registered office is at 5 Howick Place, London SW1P 1WG, United Kingdom (the "**Publisher**"); and
  2. **EUROPEAN SOCIOLOGICAL ASSOCIATION** whose address is ESA – FMSH, 54 boulevard Raspail, 75270 Paris Cedex 6, France (the "**Association**"),
- each a "**Party**" and together the "**Parties**".

#### **BACKGROUND**

A. The Parties entered into a publishing agreement relating to the *European Societies* and the *European Journal of Cultural and Political Sociology* (hereinafter called "**the Journals**") dated 20<sup>th</sup> December 2012 as subsequently amended by the Parties in Addendum 1 dated 5<sup>th</sup> May 2020 ( "**the Agreement**")

B. The Parties now wish to amend the Agreement on the terms set out in this Addendum.

#### **AGREED TERMS**

##### **Definitions**

1. For the purposes of this Addendum, the following terms have the following meanings:



The terms “**personal data**”, “**controller**”, “**processor**”, “**processing**”, “**data subject**”, “**supervisory authority**”, “**personal data breach**” and “**lawful basis**” shall have the meanings ascribed to them under the applicable Data Protection Law.

“**Association Data**” means all personal data in whatever form or medium which is (i) supplied, or in respect of which access is granted, to the Publisher (or any Subprocessor) whether by the Association or otherwise in connection with the Agreement, or (ii) produced or generated by or on behalf of the Publisher (or any Subprocessor)

in connection with the Agreement.

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“**Data Protection Law**” means the General Data Protection Regulation (EU) 2016/679 (the “**Regulation**”), the European Data Protection Directive (95/46/EC), the European Privacy and Electronic Communications Directive (Directive 2002/58/EC), and all applicable data protection and privacy legislation in the UK including but not limited to the Data Protection Act 2018, as amended or replaced from time to time.

“**Services**” means the services provided by the Publisher to the Association pursuant to the Agreement.

“**Sub-processor**” means any subcontractor or other party engaged by the Publisher in relation to the Services who is or will be processing Association Data pursuant to subclause 6(e) below.

#### **Data processing addendum**

2. In consideration of the mutual promises and other valuable consideration set forth herein, the Parties hereby agree to vary the Agreement to incorporate the following terms and conditions of this Data Processing Addendum in order to comply with their respective obligations under applicable Data Protection Law.

3. The terms of this Addendum shall be effective as from 25 May 2018.

4. The Parties agree that this Addendum amends and replaces: (i) the provisions in the Agreement that relate expressly to the Parties’ use of personal data, including any specific data protection clauses and data protection schedules in the Agreement; and (ii) any other provisions in the Agreement that conflict with the terms of this Addendum. In the event of a conflict between the terms of the Agreement and this Addendum, the terms of this Addendum shall prevail. All other terms and conditions of the Agreement shall remain in full force and effect.

#### **Data processing terms**

5. The Parties agree that the Publisher (and any Sub-processor) may process Association Data for the purposes of providing the Association with the Services during the term of the Agreement. Such Association Data may include:

(a) names, addresses and email addresses of the Association’s members to enable the Publisher to deliver certain services to those members to the extent set out in the Agreement;

(b) names, addresses, email addresses and information on payment status for subscribers to the Journals to enable the Publisher to manage Journal subscriptions pursuant to the Agreement; and/or

(c) names, addresses and email addresses for members of the Journals’ editorial boards to enable the Publisher to contact board members directly in relation to editorial matters for the Journals.

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6. For the purposes of this Addendum, to the extent the Publisher acts as a data processor in providing the Services to the Association who shall act as the data controller, the following terms shall apply:

- (a) only process the Association Data as necessary to perform its obligations under the Agreement or as required by law applicable to it (provided that the Publisher first informs the Association of that legal requirement before processing, unless that law prohibits this on important grounds of public interest);
- (b) ensure that all staff who have access to Association Data have committed themselves to appropriate obligations of confidentiality;
- (c) maintain all appropriate technical and organisational measures to protect the Association Data. Such measures shall be compliant with the publisher's applicable IT security policies and in accordance with good industry practice applicable to an organization equivalent to the Publisher handling personal data equivalent to the Association Data in equivalent circumstances;
- (d) assist the Association to fulfill its obligation to respond to requests for exercising of data subject rights (including access requests) existing under Data Protection Law (**Rights of the data subject**);
- (e) not engage any Sub-processor in relation to the Services without the prior written authorisation of the Association or except pursuant to the following general authorisation. The Association grants the Publisher a general authorisation to engage Sub-processors as necessary to perform the Services. If requested by the Association, the Publisher will provide the Association with a list of Sub-processors engaged by the Publisher in relation to the Agreement, and the Association shall have the right to object to any new Subprocessor/sub-contracting within seven (7) days after the date of such notification. The Publisher may notify the Association of Sub-processors/subcontracting either by sending the Association a notice by email or by placing a notice on its website. The Publisher will conduct appropriate due diligence in respect of the Sub-processor's data privacy and security practices and procedures and shall enter into a written agreement with each Sub-processor containing obligations which are equivalent to those set out in this clause;
- (f) not transfer any Association Data outside the European Economic Area (EEA), except as described in the Publisher's Privacy Policy currently available at <http://taylorandfrancis.com/customer-privacy> and otherwise with the express prior written consent of the Association. The Publisher has put in place international data transfer agreements with affiliated companies and with

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relevant Sub-processors based on standard contractual clauses approved by the European Commission;

- (g) if requested by the Association, provide the Association with reports concerning the Publisher's data protection procedures relating to its compliance with this clause;
- (h) notify the Association as soon as reasonably practicable and in writing if it becomes aware of a personal data breach and provide the Association with assistance in responding and mitigating it. The Publisher shall maintain a log of personal data breaches;

(i) assist the Association in complying with Article 35 (**Data protection impact assessment**) and Article 36 (**Prior consultation**) of the Regulation in respect of any new type of processing proposed, in accordance with Data Protection Law;

(j) on expiry or termination of this Agreement, at the Association’s instruction either destroy all Association Data or transfer it to the Association or a nominated third party (in a mutually agreed format and by a mutually agreed method), with the exception that the publisher shall be entitled to retain specific Association Data if required by law or if permitted for certain legitimate business purposes, as further described in the Publisher’s Privacy Policy currently available at <http://taylorandfrancis.com/customer-privacy>.

7. The Association warrants and represents that either (i) it has collected all necessary consents from data subjects or (ii) there is another valid lawful basis for the provision of the Association Data to the Publisher and for the Association Data to be processed by the Publisher in the ways described in clause 5 above. The Association shall, immediately on demand, fully indemnify the Publisher and keep the Publisher fully and effectively indemnified against all costs, claims, demands, expenses (including legal costs and disbursements on a full indemnity basis), losses (including indirect losses, loss or corruption of data, loss of reputation, goodwill and profits), actions, proceedings and liabilities of whatsoever nature arising from or incurred by the Publisher or its affiliates in connection with any breach by the Association of this clause 7. Any limitation of liability and exclusion of loss provisions in the Agreement shall not apply to this indemnity.

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This Addendum is made and entered into as of the date of the last signature below.

Signed for and on behalf of  
**INFORMA UK LIMITED trading as TAYLOR  
& FRANCIS GROUP**

Name ..... Matthew Derbyshire .....  
Signed .....  
Title ... Global Portfolio Director .....

Date .....

Signed for and on behalf of  
**EUROPEAN SOCIOLOGICAL ASSOCIATION**

Name ..... Professor Marta Soler-Gallart .....  
Signed .....  
Title President of European Sociological Association  
Date .....

## **Annex 5**

### **Report on activities of the PC of ESA-Exec period December 2020 to May 2021**

#### **Short activity report**

The PC met 3 times in extensive sessions: January 29<sup>th</sup>, February 22<sup>nd</sup>.

We had meetings with T&F: November 11<sup>th</sup>, 26<sup>th</sup> and 30<sup>th</sup>, December 4<sup>th</sup>, March 5<sup>th</sup>.

Next meeting of PC is on May 21<sup>st</sup>.

#### **Main activities were:**

1. Developing our basic publishing strategy
2. Searching and appointing a new editor team for ES
3. Developing our OA criteria and future strategy
4. Communication with publishers and OA service providers

#### **Ad 1. Developing our basic publishing strategy**

The PC discussed and fine-tuned four basic criteria of ESA's general publication strategy and proposed this to the Exec meeting where this paper was finally agreed upon, see [Annex 5.1](#).

#### **Ad 2. Searching and appointing a new editor team for ES**

Based on the basic publication strategy the PC prepared a call ([Annex 5.2](#)) for new editors for ES, given that Michalis Lianos already served for more than five years as responsible editor. We got three bids, two of them very substantial applications of high professional teams. The PC and all currently active editors of ES and EJCPS participated in the discussion with both teams and decided unanimously to propose the team of Evelyn Ersanilli, Alexi Gugushvili and Patrick Präg to the Exec (see the notes of the meeting in [Annex 5.3](#)). The Exec unanimously followed the recommendation of the PC. The new editors team will be announced in the next issue of ES (see [Annex 5.4](#)).

#### **Ad 3. Developing our OA criteria and future strategy**

The PC, together with all journal editors, deliberated intensively on the different strategic options for transforming both journals into fully OA journals. The Chair of the PC updated an Excel file based on the criteria of (1) professional Status / Experience, (2) APC costs, (3) Number of Social Science Journals hosted (sociology, anthropology, political science), (4) Number of Gold OA Social Science journals hosted, (5) OA Journals for Sociology, (6) Impact Factors, (7) CiteScore (Scopus), (8) our own criteria as summarized index of Scientific Quality (measured by ESA's own mechanisms), (9) Internal Inclusiveness (APC, non-APC quota, discounts),

(10) External Inclusiveness (Gold Standard, Hybrid, Access Restrictions?), (11) Scientific Impact (Impactfactor +Citescore), and (12) Our own ESA Comments. There were identified some additional criteria that could be taken into account like (13) Visibility (Measured by Altmetric Attention Score), (14) Societal Impact (measured by citations of journal articles in defined policy or public media), (15) Financial sustainability (incoming royalties versus outgoing support, e.g. possible royalties calculated against APCs and other costs).

#### **Ad 4. Communication with publishers and OA service providers**

Our President and the Chair of the PC had conversations with different publishers and agencies (MDPI, Wiley, Frontiers in Sociology, BUP, Springer and T&F). BUP asked some specific questions, that we answered immediately ([Annex 5.5](#)), but until now we did not receive a specific offer. As all these meetings were of either informal or formal character, we still do not have specific offers of different publishers.

T&F, as well as other publishers and agencies, is developing many efforts to convince ESA to sign a new contract once the current one finishes in December 2023. Therefore, T&F offers a specific platform strategy for associations (see [Annex 5.6](#)).

During this year and 2022, ESA has to decide between the different basic strategic options already mentioned in the last PC activity report:

**“Option “university publishers”** is good in terms of professionalism and quality (with minor experiences of BUP in the field of sociology) and in the case of some journals of impact factor, but internal and external inclusiveness is moderate due to relatively high APCs and/or hybrid strategies of access. In our quantification it ranks very **good**.

**Option “specialized OA services”** is good in terms of lean and fast processes and inclusiveness, but (still?) weak in scientific impact and debatable in terms of (sociological) professionalism and expertise and quality policies. In our quantification it ranks **moderate**.

**Option “large publishers”** is good in terms of quality, scientific impact and (sociological) expertise and professionalism, but moderate in terms of inclusiveness (as oriented in hybrid strategies). In our quantification it ranks **highest**.

**Option “independent consortium”** is **very good** in terms of **inclusiveness** but challenging in all other aspects; it could have substantial growth options in the future; much depends on the specific place to berth and anchor. As publications of a huge professional association, our journals would have some **specific and unique advantages** for such an option, but it would be also a **risky option** where we would have to act and manage with caution.”

Bochum, May 2021

Ludger Pries

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## Annex 5.1:

### ESA journals publishing policy

#### Basic aspects and criteria for ESA journals publishing policy Proposal L. Pries January 2021

Basic aims	Criteria	Comment
Scientific quality of journals	Metrics <sup>16</sup>	ESA aims at high journal <b>impact factor</b> (for recognition in scientific community) and high Altmetric (for perception in broader audience) proposal SJR, HPoP.
	ESA quality criteria <sup>17</sup>	ESA defines <b>own quality criteria</b> via a bi-annual award (1 <sup>st</sup> to 3 <sup>rd</sup> ) for excellent ESA articles aiming at a broad scope of paradigms, methods and topics. <sup>18</sup>
Inclusiveness and transparency	For readers	ESA aims at offering <b>full OA journals</b> without barriers of access. Aims and review processes of the journals should be transparent. <sup>19</sup>
	For authors	ESA aims at offering <b>full access for all quality papers without or with low direct cost for authors.</b> <sup>20</sup> Reviewer selection and reviews are treated in a transparent way. <sup>21</sup>
Editorial professionalism	Professional staff <sup>22</sup>	Given the high turnover rate of ESA committees and of editors, ESA has to rely on and budget for <b>high qualified professional technical assistant staff.</b> <sup>23</sup>
	Training activities <sup>24</sup>	Given the highly dynamic landscape of scientific publication ESA has to <b>guarantee and budget yearly training activities for editors and editorial assistants.</b>

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<sup>16</sup> In a range of priorities: 1. **SJR** (see: [SJR : Scientific Journal Rankings \(scimagojr.com\)](https://scimagojr.com)); 2. **HPoP** (see <https://harzing.com/resources/publish-or-perish>); SJR and HPoP are freely accessible and include most of relevant metrics; 3. **Altmetrics** (see: <https://www.altmetric.com/> - citations in the broader public, wikipedia and overall visibility in the broader society per; ESA should ask publishers to provide this service).

<sup>17</sup> Genuine sociological approaches; clear focus on theory and empirical evidence driven journals; interdisciplinary references; the awards could be defined e.g. annually by the ExeC based on PC proposal.

<sup>18</sup> The awards involve a selection committee with members of the Publications Committee, of editorial boards of the journals, and journal editor, with criteria that combines quality, novelty and plurality in the research approaches. The awards are announced in the ESA bi-annual conference.

<sup>19</sup> Cost calculation and publisher negotiations should include a substantial raise of journal pages per year.

<sup>20</sup> ESA aims at balancing APC costs of PlanS and rich countries with a system of waivers so that authors will have either no direct costs or reduced costs for publishing papers in our journals.

<sup>21</sup> APCs should be financed via PlanS countries and low or now costs for authors from other countries. Concerning transparency, journals' current information should be reworked and extended, especially concerning review policy and procedures (see e.g. <https://www.tandfonline.com/action/journalInformation?show=aimsScope&journalCode=reus20>).

<sup>22</sup> When going with a publisher: number and availability of staff dedicated to social science; indexing; promotion of visibility; no. of sociological journals hosted.

<sup>23</sup> Part of the professional support should be covered by the Publisher (promotion of articles, support to editor's initiatives, part of training of editors etc.); part of the professional support should be covered by ESA (editorial assistant).

<sup>24</sup> Quantity and quality of workshops, meetings etc.

<b>Financial sustainability</b>	Income <sup>25</sup>	ESA will <b>neither finance</b> in huge amounts the journals <b>nor</b> aim at <b>making much money</b> with the journals; incoming money could derive from royalties or APC-bonds.
	Ongoing costs <sup>26</sup>	Fix costs include editorial assistance, editors' travelling costs, training costs; incoming resources for each journal should at least equal ongoing <b>costs of 15,000 – 20,000<sup>27</sup> €</b>

### Goals and strategy

1. ESA aims at balancing the before mentioned general aims.
2. Both journals (and possible further ones) should produce win-win-effects by differentiation.
3. ESA wants to transform both journals into full OA until January 2024 at the latest.
4. Incoming royalties and/or APCs should at least balance with the ongoing costs.

Given that complexity and dynamics of journal publication will increase and that, by nature, Executive Committees and also Editors of our journals will rotate a lot, **ESA should either go on with a high quality professional publisher experienced in social science and sociological journals or extent its professional journal editing assistant staff.**

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### Annex 5.2:

#### Call for expressions of interest for ES

#### Call for expressions of interest in editing the journal *European Societies*

The present Editor of ESA's journal *European Societies* is completing his term of service. ESA therefore is seeking expressions of interest for this position. The new editor or up to three editors (Editor in the following) will take on responsibilities in the course of 2021 (month can be defined). The deadline for **expressions of interest is 30<sup>th</sup> of December 2020.**

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- It publishes research from every part of the planet on all aspects of social life either related to Europe or in a comparative perspective.
- It welcomes all sociological methods and approaches in sociological theory.
- It focuses on addressing the specific contribution of contemporary European society/societies to a global world, as well as on the serious socioeconomic and socio-political challenges that European societies face.

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<sup>25</sup> Royalties, incoming APC-reimbursements, fixed agreed budget etc.

<sup>26</sup> Technical/editorial assistant, print copies etc.

<sup>27</sup> Publication budget of ESA should include: travelling/office costs for editors, salaries for editorial-technical assistants, language checking costs, fees for training of editors and assistants

- It is strictly focused on high quality articles, and therefore prevents favoritism (e.g. editors, board members etc. cannot publish in the journal during their term; young researchers are welcome; 'Matthew effects' should be inhibited).

*European Societies* is a hybrid journal with a strong commitment to increase accessibility for its readers and authors. Given the complex and dynamic current situation of moving towards Open Access, the new Editor will have the opportunity to forge this process in strong cooperation with the Executive Committee of ESA and the publishing company Taylor & Francis. This process of redefining the publication strategy shall be fine-tuned until the end of 2022.

According to ESA's bylaws and custom and practices, the editorial work of *European Societies* could be organized either by one editor or a team of up to three editors. The post of Editor is assigned by ESA for a period of five years. The Editor is supported by an editorial assistant and responsible for (1) developing the general publication strategy jointly with the Executive Committee, especially the Publication Committee of ESA, for (2) organizing the review process of incoming papers and guarantee a regular publication of high quality issues, for (3) developing proposals and organizing special issues and (4) for bridging and bonding with the ESA office in Paris, the publisher and the Editorial Board (<https://www.tandfonline.com/toc/reus20/current>).

The new Editor should take on full responsibilities in the second half of 2021 (after a period of liaising and handing over with the current Editor). Regular activities are mainly:

- invite different types of papers such as full research articles, thematic field overviews, book reviews,
- follow and relate to activities of ESA's Research Networks and invite persons and groups for special issues,
- balance paper submissions and published articles according to different career stages, thematic fields, applied theoretical paradigms and methods, geographical regions,
- attend meetings of the Publications Committee, when invited, and report on the journals activities

Interested persons or teams must have a good command of English language.

Expressions of interest should

- contain up-to-date CVs;
- a summary of experiences and contacts relevant to the editorial work;
- strategic ideas for further developing the journal;
- as the work of Editors is unpaid, possible resources that occasionally could be brought in (e.g. office space, manpower);
- credentials of academic organizations the applicants are working in.

Expressions of interest should be sent to the ESA office ([esa@europeansociology.org](mailto:esa@europeansociology.org)). For any questions, don't hesitate to contact the current Editor of ES (Michalis Lianos, [eusoc@essex.ac.uk](mailto:eusoc@essex.ac.uk)) or the Chair of the ESA Publications Committee ([ludger.pries@rub.de](mailto:ludger.pries@rub.de)).



### **Annex 5.3:**

#### **Notes of the meetings with applicant editor teams**

Minute of meetings with applicant teams for ES editors, Monday 22<sup>nd</sup> Feb. 2021

Tiziana Nazio, Sebastian Koos, Ludger Pries, Irina Tartakovskaya (only in the second meeting) for ESA PC, Michalis Lianos for ES

At 3pm: meeting with Ana Vidu and Emilia Aiello (Carmen Elboj did not participate)

At 4pm: meeting with Evelyn Ersanilli, Alexi Gugushvili, Patrick Präg

Both teams had prepared a short presentation and presented their motivations, aims and methods to work. Both teams appeared as very experienced and motivated, both already have substantial experiences in editing scientific journals, know the ESA context and looked as being able to manage ES. In our subsequent deliberation (Tiziana Nazio, Sebastian Koos, Ludger Pries, Michalis Lianos; Irina Tartakovskaya only could participate in the second meeting at 4pm but not in the following discussion) all four we agreed that the Ersanilli/Gugushvili/Präg team was stronger in several aspects. Meanwhile Vidu/Aiello presented themselves with very much enthusiasm and as young motivated PostDoc scholars (it was a little bit irritating that the head of the team, Carmen Elboj, did neither participate nor had sent any explanation), the other team appeared as middle age and already more settled scholars. The comments and proposals they made concerning the “unique selling points” of ES, the ways to improve quality, review process, attractiveness of the journal for submissions, especially its inclusiveness for smaller and countries at the margins of Europe revealed a very high substantial professionalism and deep knowledge and experience of journal editing but also of the general market conditions in the field.

Therefore the team decided unanimously to **propose Ersanilli/Gugushvili/Präg team as new editors.**

Ludger Pries, 23th Feb. 2021

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### **Annex 5.4:**

#### **Announcement of new editors of ES**

New editor team for European Societies!

Dear readers of European Societies,

It is my great pleasure to inform you that the ESA now chose and appointed, with effect from September, a new editor team for our flagship journal *European Societies* (ES). Michalis Lianos took over ES from Göran Therborn as Editor-in-chief since the first issue of volume 17 in 2015, so he is now in his sixth year of being responsible for the journal. As our statutes de-

limit the term of editors to five years, in autumn 2020 the Executive Committee of ESA published a call for expressions of interest in editing the journal and defined a deadline of end of December 2020. The call was distributed via our magazine *The European Sociologist* and via all Research Networks.

In the call we underlined the basic characteristics of ES as covering all relevant aspects of sociological theory and empirical research; publishing research from every part of the planet on all aspects of social life either related to Europe or in a comparative perspective; welcoming all sociological methods and approaches in sociological theory; focusing on addressing the specific contribution of contemporary European society/societies to a global world, as well as on the serious socioeconomic and socio-political challenges that European societies face; and underlining that ES is strictly focused on high quality articles, and therefore prevents favouritism (e.g. editors, board members etc. cannot publish in the journal during their term; young researchers are welcome; 'Matthew effects' should be inhibited).

We also emphasized the explicit strategy of the ESA to lead its associational journals towards Open Access and underscored the great opportunity for the new editors to forge this process in strong cooperation with the Executive Committee of the ESA. This process of redefining the publication strategy shall be fine-tuned until the end of 2022 in close coordination with our publishing company Taylor & Francis.

Fortunately, we received three substantial bids of teams that presented elaborated proposals how to develop the journal. As our Executive Committee always focuses on transparency and democracy, the Publication Committee invited the current editor and the editors of our second journal, the *European Journal of Cultural and Political Sociology*, to participate in the extended meetings that we had with the two most promising teams. Both teams consisted of highly experienced professionals of our discipline and integrated a wider range of specific knowledge and career position. Finally, first the Publication Committee and the current editors and then the Executive Committee as a whole, unanimously agreed to assign the team of Evelyn Ersanilli (University of Amsterdam), Alexi Gugushvili (University of Oslo), and Patrick Präg (CREST/ENSAE/IP Paris) as new editors. We are fully convinced that they will lead ES into a promising future. Michalis Lianos will hand over in September this year so that there is enough overlapping time for warming up.

This is a good first opportunity to express our deep thanks to our outgoing editor Michalis Lianos. Every sociologist knows the value of published articles. They are probably the most important communication media, the fuel for scientific knowledge and debate. But we all also know the very hard work that is to motivate possible submitters of papers, to find actually qualified and responsible reviewers, to invite authors to revive and improve their submitted pieces, to communicate with the technical assistants, the publisher, the Executive Committee and the ESA office team. For a journal like ES, this may amount to a full-time job but the ESA, like other associations, cannot afford to pay a salary. Michalis worked in an ideal way, always procuring high quality and impact of the journal, encouraging especially young scholars to engage with ES and always looking for specialized and accountable reviewers. ESA and all of us we owe much to Michalis. The same holds for our editorial assistant, Agnes Skamballis, who offers her services to the ESA for a modest fee. Without her assiduous work, ES could not attain the continuity and the quality appearance that it has. We also

express our thankfulness to the associate editors during Michalis's term. Finally, we wish to explicitly honour the selfless engagement of our reviewers.

Our journals reflect the capacities of generous joint efforts. We are fully convinced that the new team will continue with fresh ideas and new energy for the sake of this endeavour.

Ludger Pries (chair of Publication Committee)

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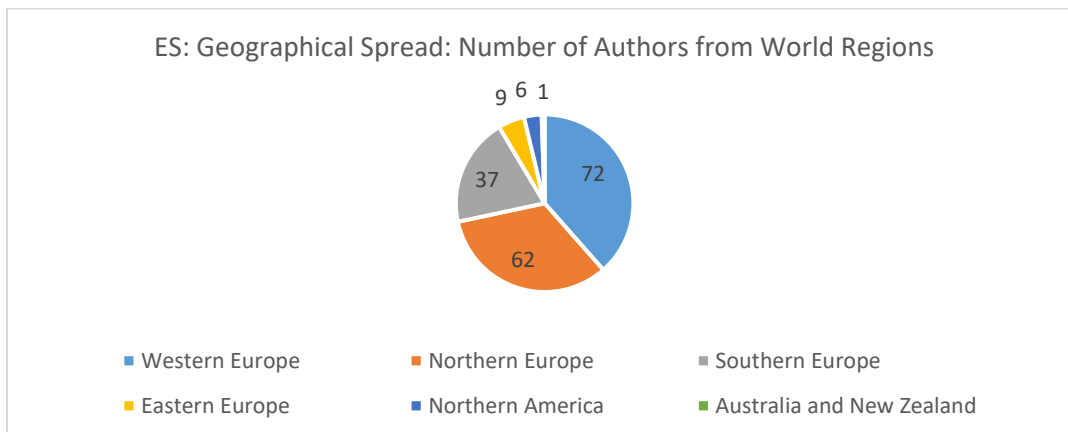
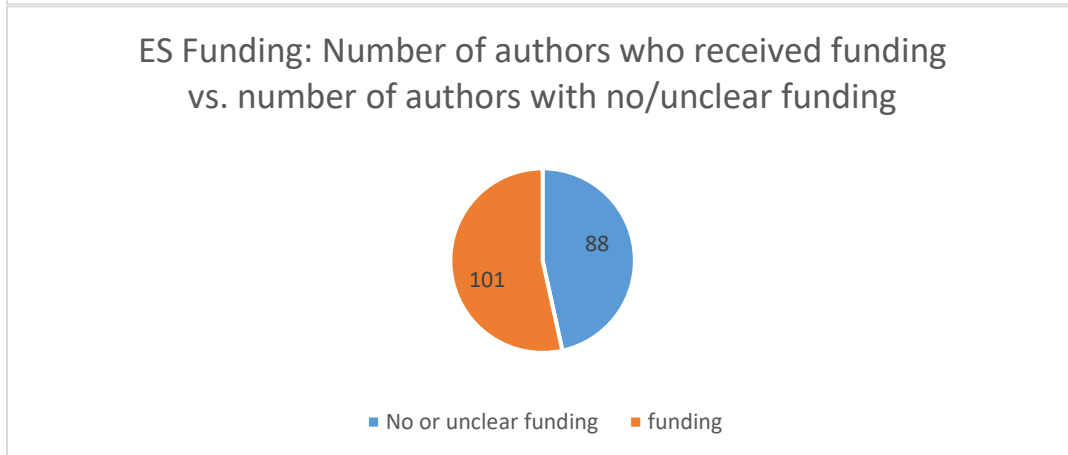
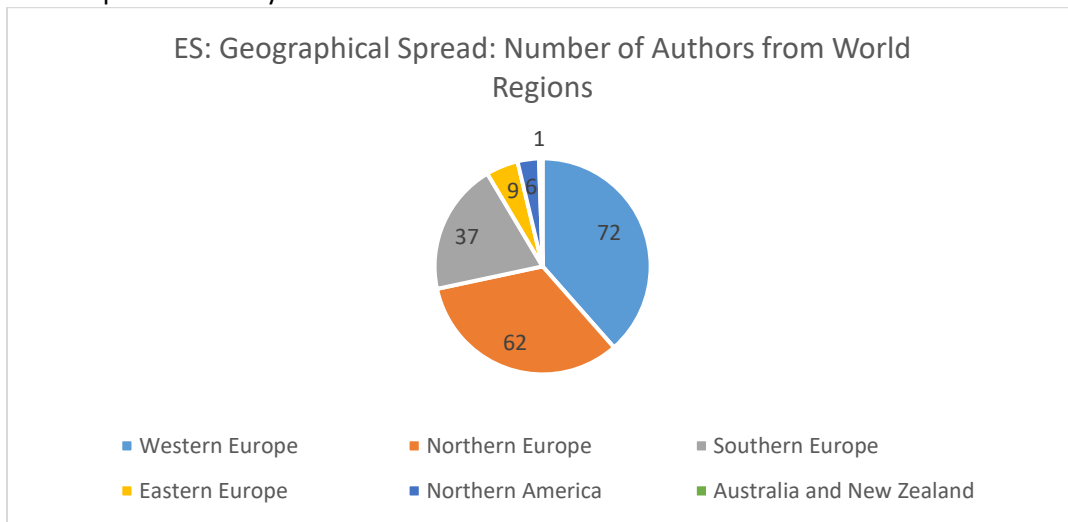
**Annex 5.5:**

**Questions raised by BUP and answers by PC Chair**

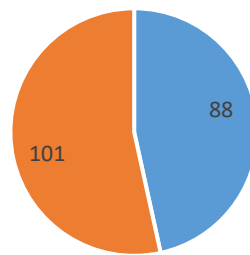
Concerning some questions raised by BUP here are some infos

Ludger Pries/2021-01

1. The geographical spread of authors for each journal.
2. How many papers are based on funded research for each journal and which funders are they predominantly?



ES Funding: No. of authors receiving funding



■ No or unclear funding ■ funding

3. Are you wanting to move immediately to a Gold Open Access model in 2024 or are you still considering other options for an OA transition?  
After multiple rounds of deliberations in ESA we are fully convinced that both journals should switch to full OA in 2024.
4. Is the ESA looking for a return under an OA model?  
ESA aims at full inclusiveness for readers and authors. Therefore, we look for mixed financing options with wavers etc.
5. What are the foremost aims of the journals now for the ESA?  
Both journals defined specific aims for 2021. Both journals are journals of an association, therefore the long-term aims are defined jointly between editors and Executive Committee.

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## Annex 5.6: T&F Open research strategy



## About F1000Research.

**F1000Research** is a fully open-access publishing platform, offering rapid publication of articles and other research outputs. We offer innovative open publishing solutions that support your mission, providing your members with a rapid, transparent and open way to get their research seen and cited. Our publishing services range from customizable Gateways that allow your community to publish on the F1000Research platform, through to fully-branded bespoke open research publication Platforms.

F1000Research platforms are fully Plan S and DORA compliant, providing an open and rapid publication hub for all of your researchers' and members' outputs including research articles, posters, slides and documents. All articles benefit from transparent post-publication peer review, and editorial guidance on making source data openly available.

F1000Research shares your goals: to further the mission of your society or association by opening up research for further engagement, to recognise the full range of research undertaken by your members, and to ensure the visibility of non-traditional research types and offer appropriate credit to all those involved in doing this work.

**Good for Researchers. Good for Research. Good for Society.**

# The F1000Research publishing model.

F1000Research is an open research publishing platform for researchers, scholars and clinicians offering rapid publication of articles and other research outputs without editorial bias.

F1000Research's publishing model combines the benefits of pre-printing, including the ability to publish rapidly, with functionality that ensures the robustness, quality, reproducibility, and transparency of research through rigorous editorial checks, open data support, and invited open peer review. Authors are provided with autonomy throughout the publishing process.

A wide range of different peer-reviewed article types are supported including software tool articles, registered reports, method articles and more. Gateways on F1000Research, and Platforms powered by F1000Research, also publish non-peer-reviewed content including slides, posters and documents, offering a holistic view of your research output.



## Open

Findings are openly accessible; text and data mineable. Plan S and DORA compliant.



## Rapid

Research findings published in as few as 14 days.



## Transparent

Invited peer review, after publication. Open identities, visible peer review reports, and version history.

F1000Research

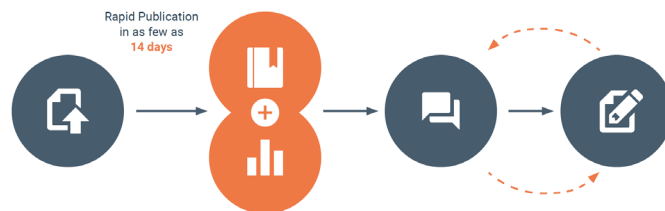
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## Research articles.

Research articles published by F1000Research include: software tools, study protocols, data notes, registered reports, systematic reviews, method articles, case reports and more.

### All peer-reviewed research articles:

- Are published CC-BY and fully Plan S compliant.
- Can be cited as soon as they are published, in as few as 14 days after submission.
- Are underpinned by data with our mandatory FAIR data policy – 'as open as possible, as closed as necessary'.
- Can include living and interactive figures.
- Can be continuously updated through linked versions for revisions and updates.
- Are supported by a range of article-based citation and attention metrics including downloads, social shares and altmetrics.



### Article Submission

Submitting an article is easy with our single-page submission system. The in-house editorial team carries out a basic check on each submission to ensure that all policies are adhered to.

### Publication & Data Deposition

Once the authors have finalised the manuscript, the article (with its associated source data) is published, enabling immediate viewing and citation.

### Open Peer Review & User Commenting

Expert reviewers are selected and invited, and their reports and names are published alongside the article, together with the authors' responses and comments from registered users.

### Article Revision

Authors are encouraged to publish revised versions of their article. All versions of an article are linked and independently citable. Articles that pass peer review are indexed in external databases such as PubMed, Scopus and Google Scholar.

F1000Research

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# Non-peer-reviewed research outputs.

F1000Research also publishes slides, posters and documents, supporting a move towards a more holistic view of research outputs.

#### All non-peer-reviewed content:

- Undergoes editorial checks prior to publication.
- Is Open Access – default CC-BY licence.
- Receives a unique digital identifier (DOI).
- Is supported by a range of article-based citation and attention metrics including views and downloads.

Posters, slides and documents can only be published through Gateways or on our bespoke, open research publishing platforms.



#### Submission

Submitting posters, slides and documents is easy. It only takes a couple of minutes with our single-page submission system.

#### Publication

Posters and slides are immediately visible on F1000Research to share with the wider community. Documents are available within one working day. Publication is fully open access.

#### DOI

After editorial checks are completed posters, slides and documents receive a DOI (Digital Object Identifier) and become citable.

## Options for societies and associations.

### Gateways | F1000Research

An open research publishing hub, hosted on the F1000Research publishing platform, allows your members to publish all types of content in addition to peer-reviewed academic articles.

### Platforms | F1000Research

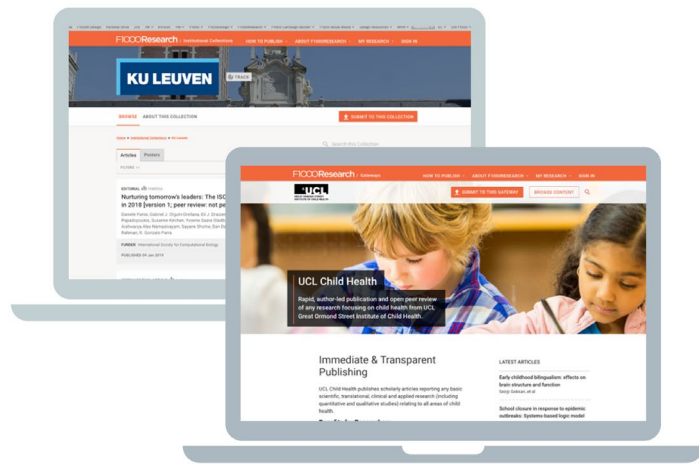
An independent open research publishing platform utilizing the F1000Research publishing model to enable the publication of a wide range of research article types and other research related outputs, with a unique Platform citation. Controlled by you and entirely branded and customisable to the society or association, with all infrastructure and editorial services managed by F1000Research.



# Gateways | F1000Research

A personalized, customizable publishing hub to collate and showcase all your members' research in one searchable and shareable domain:

- Furthers your mission by making research more open and more visible for your community.
- A society or association Gateway allows your members to publish every one of their research outputs, including technical reports, policy documents and posters, allowing for increased visibility of their work.
- Enable your researchers to attract citations straight away and see their research indexed in major indexes once it passes peer review.
- Brand and customise your Gateway to your society or association and add optional features such as links to your society website, mailing list collection, member news and options to list all of your publishing portfolio, regardless of publication venue.
- Support your members' open research practices with a fully Plan S and DORA compliant publishing venue.
- Articles can be published in as few as 14 days, with post-publication peer review creating an open dialogue between members and their research community.
- Content can be themed into topics for greater visibility.



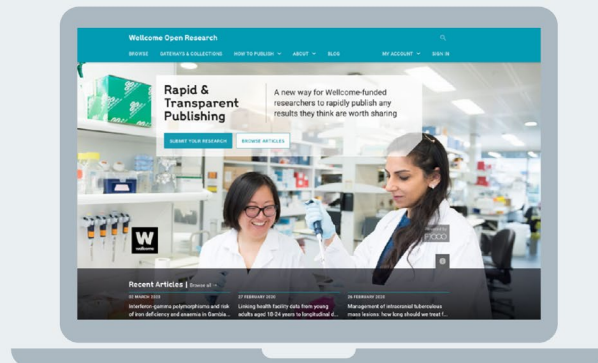
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# Platforms | F1000Research

A fully managed and customizable open research publishing solution: controlled by you, managed by us:

- Showcase and make discoverable all your members' outputs from your society or organisation, including a range of research article types and non-peer-reviewed research (posters, slides, multimedia content).
- Customize and brand your Platform to your society or association.
- Directly control your Platform and which services and metrics are used.
- Create custom Gateways and sub-topics within your Platform to support research streams/groups, sub-disciplines, conferences, practitioner research and more.
- Any citations gathered from the outputs (with DOIs) will be linked to your society or association.



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## Report for the External Relations of ESA 2019-2021

ESA has participated through its President and the Vice-President of External Affairs in the annual general assemblies of the year 2019 (15<sup>th</sup> November 2019) and year 2020 (6<sup>th</sup> November 2020) of the European Alliance for Social Science and Humanities (EASSH) organization based in Brussels. EASSH organization is a pressure group that aims to promote learning and research in the social sciences and humanities (SSH) as a resource for Europe and the world, and to engage with policymakers and research funders in support of the social sciences and humanities.

ESA has confirmed its interest and support of the actions coordinated by EASSH to establish and expand the role of social sciences and humanities in the current funding Framework of Horizon Europe.

Moreover, ESA has a stable commitment to collaborate with other scientific national and international associations in organizing common events and promoting sociology and social sciences. ESA was invited to organize special sessions in other major associations conferences (e.g. ECREA - European Communication Research and Education Association), but this process was interrupted due to the COVID-19 outbreak. However, it became possible for ESA to offer its patronage to national or regional sociological conferences organized in the period 2019-2021.

It is important to mention that ESA has received, together with other sociological associations, pleas from individuals and/or scientific associations to express its solidarity and support. In many instances ESA has expressed its solidarity and support to those who are in need and/or being persecuted by authoritarian regimes across the globe.

In the era of COVID-19, ESA has joined as partner in the EUvsVirus Hackathon (organized on 24-26 April 2020) and many of its Executive Committee members and ESA members joined forces and participated in the organization of this event. Moreover, ESA participated in the EU Hackathon 2021 by encouraging its members to contribute to this major European wide event (16-17 April 2021). For the Barcelona Conference hackathon, participants were invited to get together to develop ideas in different areas related to the conference, considering also that the conference will take a hybrid format.

It is important to add that numerous initiatives and events were organized and/or coordinated by EASSH which very relevant to the research and policy related actions of ESA members (both institutional and individual) since a number of position papers are published (see for example <https://eassh.eu/Position-Papers> and/or <https://eassh.eu/News>). In brief, we refer to the following EASSH initiatives:

- EASSH issued a position paper (<http://www.eassh.eu/c/mission-covid-19-global-problems-need-research-portfolio>) that calls for European policymakers and funding agencies to ensure that all domains of research are mobilised to address the challenges of COVID-19, using a mission-type “portfolio approach” of projects and disciplines. In addition to medical and biological research, studies into the social, cultural, and human aspects of our lives are considered crucial for tackling this crisis. This position paper

suggests the following: a) support and fund research projects from different disciplines on COVID-19 including the studies of vital importance provided by the humanities, social sciences and creative arts; b) ensure the research approaches of social science and humanities are funded to contribute to current and future missions; and c) inform future research and policy strategies using insights emerging from the current crisis around the intersection between public health, structural inequalities, political systems, and cultural norms and values.

- The recent circulation of a Position Paper by EASSH entitled “**SSH integration in Horizon 2020: Lessons for Horizon Europe**” (<https://eassh.eu/Position-Papers/SSH-integration-in-Horizon-2020--Lessons-for-Horizon-Europe~p1273>) is also important. In this Position Paper EASSH recommends four crucial steps: 1) A European Social Platform needs to be established to complement the existing 41 ETPs (European Technological Platforms) to create efficient communication between the SSH community and the EC, which EASSH would be happy to host; 2) Co-design of calls & topics (here also a trusted ETP platform for structural consultation and SSH input in the process would be highly valuable); 3) Clear evaluation criteria to make the SSH component compulsory in flagged topics; 4) Panels of experts from different disciplinary backgrounds across the whole programme.

Finally, the External Relations domain is an important arena for the European Sociological Association (ESA) not just for expanding its relations with other scientific organizations, but more importantly for networking with policymakers and the European Commission in particular. In this regard, ESA is an institutional member of the International Sociological Association (ISA), together with other Regional and National Sociological Associations, and member of the European Alliance for Social Sciences and Humanities (EASSH), which is a formalized pressure group to increase the mainstreaming of social sciences and humanities across European funded research and to support the further expansion of social science and humanities impact in research and policy. Based on my experience in the last years, both institutional partnerships are considered strategically important to ESA for pursuing further its mission and objectives.

All in all, in times of the current COVID-19 pandemic, and because of the postponement and/or hybridization of conferences and scientific actions, the domain of External Relations has minimized, not to say diminished.

Apostolos G. Papadopoulos  
Vice-President/Chair of the External Relations

# Report

## Chair of ESA RN Committee

Teresa Carvalho (Chair)

Milica Antic Gaber; Teresa Consoli; Tiziana Nazio; Ludger Pries and Irina Tartakovskaja

### RN funding applications

#### Background:

This was a very unusual term to RNs due to the pandemic situation. ESA RN committee have tried the best to be flexible and to give more opportunities to RNs to reorganize themselves. Several new deadlines were defined to allow RNs to apply for funding. It was opened the possibility for RNs to apply not only for funding for midterm conferences but also for other initiatives, including activities or events during the Barcelona conference. This flexibility also included allowing the organization of events closer to the annual conference in August 2021. A last opportunity was given to all RNs to send their funding application until 16<sup>th</sup>. of June to support events in the Barcelona conference. For those RNs that changed to online format, ESA offered the zoom license. However, for the first time, a considerable number of RNs didn't send any budget application (14). All the others had support from ESA to their events including webinars and midterm conferences and activities organized within the major conference in Barcelona (Table 1).

**Table 1** – Current situation of RNs midterm conferences (25/08/2021)

RN		Event	Amount Available	Transferred
RN01	Ageing in Europe	Webinar 20-22 January - University of Jyväskylä – Totally <b>online</b>	ESA Support – 2000€ + Membership fees 2018/2019 = 960€	Obtained Zoom license.
RN02	Sociology of the Arts	The Social Effects of Art - POSTPONED UNTIL 9-12 <b>MARCH 2021!</b> Online conference hosted by ESA and University of the Arts Helsinki, Finland	ESA Support – 2000€ + Membership fees 2018/2019 = 940€	YES Total=2940€
RN03	Biographical Perspectives on European Societies	“Biographical work in a time of social distancing: interview (s), analysis, interpretation” 25-26 September 2020 A two-day interactive <b>online</b> event. Organised by ESA RN03 in collaboration with the BNIM study group of the Sociological Association of Ireland (SAI)	ESA Support – 2000€ + Membership fees 2018/2019=370€	YES Total=2000€

RN04	Sociology of Children and Childhood	Childhood in (Climate) Change <b>Virtual Mid-term</b> Symposium Sion (Switzerland) 9-11th September 2020	ESA Support – 2000 € + Membership fees = 840€	YES Total=2000€
RN05	Sociology of Consumption	Citizenship and Consumption – All powerful, all powerless? 26 - 29 August 2020 <b>Virtual conference.</b>	ESA Support – 2000 € + Membership fees = 1200€	No budget transfer
RN06	Critical Political Economy	What's Next? Critical Political Economy at the End of Neoliberalism? Move the entire <b>workshop online</b> 19-20 June 2020	ESA Support – 2000€ + Membership fees = 660€	YES TOTAL=2660€
RN07	Sociology of Culture	En-Compass-ing Culture(s): Beyond East/West and South/North 10th to 12th March 2021 Online conference, hosted by ESA and University of Helsinki	ESA Support – 2000 + Membership fees = 1330€	YES TOTAL=2330€
RN08	Disaster, Conflict and Social Crisis	Disaster, Conflict and Social Crisis 20-23 August 2019 Manchester	ESA Support – 2000€ + Previous Membership fees =1820€ + Membership fees = 330€	No budget transfer
RN09	Economic Sociology	<b>CANCELLED</b> Warsaw in September 2022.	ESA Support – 2000€ + Membership fees =840€	No budget transfer
RN10	Sociology of Education	'Inclusive Education and Society in a Time of Change: Theories, Policies and Practices' 20-21 August 2020 ESA RN10 - Sociology of Education	ESA Support – 2000€+ Membership fees = 1470€	YES TOTAL=2000€
RN11	Sociology of Emotions	9th Midterm Conference of the ESA Sociology of Emotions Research Network (RN11) November 23rd-27th Online conference	ESA Support – 2000€ + Membership fees = 790€	YES - 2790€
RN12	Environment & Society	Fifth Energy and Society Conference: Energy Transition: Does the Mountain Give Birth to a Mouse 10-12 February 2021 University of Trento, Italy	ESA Support – 2000€ + Previous Membership fees=1040€ + Membership fees =1200€	YES TOTAL=2000€
RN13	Sociology of Families and Intimate Lives	RN13 Interim Meeting "Extended family relationships: What are they in late modernity?" Cancelled (will be postponed to January 21-23 2021) Palacký University, Olomouc, Czech Republic	ESA Support – 2000€ + Previous Membership fees=330€ + Membership fees =1590€	YES – 2000€
RN14	Gender Relations in the Labour Market and the Welfare State	<b>CANCELLED</b>	ESA Support – 2000€ + Membership fees =720€	No budget transfer
RN15	Global, transnational and cosmopolitan sociology	Global Social Change: Ideas and Interests Frascati (Rome), 26-27th May 2021	ESA Support – 2000€ + Previous Membership fees=450€ + Membership fees = 680€	YES – 2450€
RN16	Sociology of Health and Illness	Mid-term conference and PhD workshop Health and Healthcare in Europe: between inequalities and new opportunities June 2020 17th-19th February 2021	ESA Support – 2000€ + Membership fees =1030€	Still in process
RN17	Work, Employment and Industrial Relations	Industrial Relations in Europe Conference (IREC) 2022 Tampere University Because of COVID-19 the interim term conference jointly organized with IREC at Tampere University will be postponed to 2022	ESA Support – 2000€ + Previous Membership fees=970€ + Membership fees =880€	No budget transfer

RN18	Sociology of Communications and Media Research	<b>CANCELLED</b>	ESA Support – 2000€ + Membership fees =910€	No budget transfer
RN19	Sociology of Professions	<b>POSTPONED</b>	ESA Support – 2000€ + Membership fees =610€	No budget transfer
RN20	Qualitative Methods	"Seeing and the Other Senses – Making Sense of the Senses Through Language. Opportunities and Challenges in Qualitative Research. August 26 - 28, 2020" Online	ESA Support – 2000€ + Membership fees = 847,81€	Still in process
RN21	Quantitative Methods	European Sociological Association - Midterm Conference of RN 21- Quantitative Methods 9th - 10th of October, Online format	ESA Support – 2000€ + Previous Membership fees=460€ + Membership fees =760€	YES - 3220€
RN22	Sociology of Risk and Uncertainty	MULTIDIMENSIONAL RISKS IN THE XXI CENTURY - Mid-term conference of Sociology of Risk and Uncertainty Networks in ESA (RN22) and ISA (TG04) Postponed to October, 2021 University of Perugia	ESA Support – 2000€ + Previous Membership fees=950€ + Membership fees =600€	Still in process
RN23	Sexuality		ESA Support – 2000€ + Previous Membership fees=1000€ + Membership fees =8300€	YES – 2000€
RN24	Science and Technology	<b>POSTPONED</b>	ESA Support – 2000€ + Previous Membership fees=1370€ + Membership fees =1040€	No budget transfer
RN25	Social Movements	<b>POSTPONED</b>	ESA Support – 2000€ + Previous Membership fees=720€ + Membership fees =890€	No budget transfer
RN26	Sociology of Social Policy and Social Welfare	From the cradle to the grave? Social policy in diverse temporal and spatial contexts 11-12 March 2021 Berlin, Germany	ESA Support – 2000€ + Previous Membership fees=110€ + Membership fees =820€	No budget transfer
RN27	Regional Network Southern European Societies	At present, we are pursuing the possibility to have a midterm meeting in spring 2021 or, alternatively, to organize an online one.	ESA Support – 2000€ + Previous Membership fees=220€ + Membership fees =550€	YES – 2770€
RN28	Society and Sports	ESA Research Network 28 Society and Sport Midterm Conference Sport and crisis: bodies, practices, representations  Educational Sciences' Department, "Alma Mater Studiorum" - University of Bologna, Bologna (Italy), 25-26 March 2021.	ESA Support – 2000€ + Previous Membership fees=220€ + Membership fees = 220€	YES - 2440€
RN29	Social Theory	<b>CANCELLED</b> New date will be in August 2022	ESA Support – 2000€ + Previous Membership fees=1200€	No budget transfer

			+ Membership fees = 1280€	
RN30	Youth & Generation	ESA RN30 2020 Conference - GENERATIONS AND SOCIAL CHANGE. THEORETICAL AND METHODOLOGICAL IMAGINATION IN PLAY 24-25 November 2020 Online conference (with the support of University of Eastern Finland)	ESA Support – 2000€ + Membership fees =1150€	No budget transfer
RN31	Ethnic Relations, Racism and Antisemitism	Workshop Series (Online): Intersectional Perspectives on Conspiracy Theories, Nationalism, Antisemitism and Racism in Europe 6 November 2020 & 5 February 2021	ESA Support – 2000€ + Membership fees =650€	No budget transfer
RN32	Political Sociology	Back to the Future? European Progressions and Retrogressions 6th Interim Conference Political Sociology Research Network 32 of the European Sociological Association October 29-31st 2020 online as a remote/virtual event.	ESA Support – 2000€ + Previous Membership fees=70€ + Membership fees =1150€	YES – 3150€
RN33	Women's and Gender Studies	<b>CANCELLED</b>	ESA Support – 2000€ + Previous Membership fees=1910€ + Membership fees =1230€	No budget transfer
RN34	Sociology of Religion	ESA RN34 Online Conversation: Religion and the urban, natural and virtual environments 27 August 2020, 2-4 pm Information: "Religion and the urban, natural and virtual environments" - An Online Conversation	ESA Support – 2000€ + Previous Membership fees=400€ + Membership fees = 540€	YES – 2400€
RN35	Sociology of Migration	Towards Reflexivity in Migration Studies. Knowledge Production in Times of Contested Politics and Post-Colonial Dynamics POSTPONED to 21-22 January 2021 Technical University Berlin, Germany	ESA Support – 2000€ + Membership fees =1800€	YES – 3800 €
RN36	Sociology of Transformations: East and West	In search of new dimensions of social transformations" March 26-28, 2021, Prague, Czech Republic	ESA Support – 2000€ + Membership fees =420€	In process
RN37	Urban Sociology	IV Midterm Conference: "Urban Theory and Urban Praxis: Past, Present and Possible Futures" Post-poned to January 27-29 2021 On-line conference (in partnership with Bologna University, Italy)	ESA Support – 2000€ + Membership fees =1160€	yes - 2000€.

Despite the difficult times, many RNs were quite active and collaborative. RNs were asked to propose a member to be part of the Nominations Committee and we have received 6 proposals from 5 RNs (see Table 2). Fiammetta Fanizza and Peter Holley were the two selected members to be part of the nominations committee.

**Table 2 – Proposals for the Nominations Committee**

<b>RN</b>	<b>NAME</b>
<b>6</b>	Yuliya Yurchenko
<b>7</b>	Peter Holley
<b>23</b>	Chiara Bertone
<b>33</b>	Elisabetta Ruspini, co-coordinator for RN33, Italy Elina Oinas, board member RN 33, Finland
<b>35</b>	Fiammetta Fanizza

### **Notes for the next executive**

RNs are the most relevant part of this association. The term that is coming to an end was really challenging to everyone and we must be proud of the effort all the RNs have made to keep the association alive and to stimulate the scientific discussion in the middle of the chaotic situations we were all living.

For the next term, it is important to take this into consideration and to do all that is possible to support RNs. Taking this into consideration, it would be reasonable that the next ESA RN Committee includes new and current members in the RN's budget and not only the news.

When and how a Research Network is considered to have ceased to exist by the ESA is a relevant discussion that needs to be made. According to the Guidelines, a RN is considered active if it organizes sessions in the main conference. However, some RNs have been inactive in organizing midterm conferences for the last two terms.

Another important question concerns the money transfer between ESA and RNs. Although the institutions sign an agreement with ESA to return the unspent budget it is a difficult bureaucratic process to obtain this money. We have currently a specific case with RN35 and the Strasbourg university. It seems that the only way to solve this situation is to send ESA secretary personally to the university to try to solve the problem face to face with the accounting services. Furthermore, it is also quite difficult when the RN coordinators and boards change to transfer the money between their universities. A solution should be discussed including, for instance, to discuss with ESA bank to open an account for each RNs, whereas the cost of movements will be faced by their budget.

Finally, it is urgent to solve the serious problems we have with CiviCRM. The database is not showing correctly to RN coordinators the correct number of members of each RN. This is a serious question that can damage the trust relationship between ESA office and RNs. Adding



to this, some minor problems are also present since the emailing function is not properly working and the RN coordinators or the RN chair don't have direct access to the total number of members.



## ESA CONFERENCE COMMITTEE REPORT – August, 2021

### Conference Committee

Lígia Ferro (Chair)

Marta Soler

Dilek Cindoglu

Kaja Gadowska

Maria Carmela Agodi

Romina Surugiu

Teresa Carvalho

Teresa Consoli

### Organizing the ESA#2021BCN Conference in a context of pandemic

The Executive Committee (EC), the ESA committees and the ESA Office members collaborated very actively in diverse tasks for the Conference organization. The work developed was in line with what the association has done in past ESA Conferences. The tasks were accomplished within the schedule previously defined, despite the challenges imposed by the pandemic: all of them were surpassed by the vast team of organizers, a lot of them working in a voluntary basis. Each one of them was essential to operationalizing the #ESA2021BCN Conference.

The Local Organizing Committee (LOC), Chaired by Teresa Sorde, developed a set of initiatives always in articulation with the ESA Executive and Conference Committees. The Chair of the Research Networks and the Research Network Coordinators were also involved in different tasks, developing an excellent work. In the last two years, numerous online meetings took place with the different groups and actors.

## Main steps for the Conference organization

- 1- All the Executive Committee members were involved **in discussing and defining the Conference theme** at the first Executive Committee meeting (in presence, October, 2019)- the Conference Committee coordinated this task;
- 2- After collecting a list of keywords from the Executive Committee meeting, the first version of the **Conference theme** was drafted by the Conference Chair and the President, then it was circulated among all the Executive Committee members, collecting suggestions for edits. A final version was ready after integrating the comments;
- 3- Considering the pandemic, it was integrated **information about the situation of the coronavirus into the Conference theme presentation**. The colleagues from the ESA Communications Committee worked together with the Conference Committee in order to put together a clear note. This note was used in all the Conference advertising, communication and the invitations to the speakers;
- 4- The **keynote speakers for the Plenary sessions were defined** starting from a short list built together with the colleagues of the Executive Committee first and then with the colleagues of the Conference Committee. According to the ESA Executive Committee decision in Paris, on October 2019, the selection of speakers considered the following criteria to assure social diversity: gender, age, ethnical background and country of origin. The list resulted from the suggestions of the Executive Committee colleagues and the application of these criteria;
- 5- The **Plenary sessions were organized** by the Conference Committee and approved at the Executive Committee meeting held in May, 2020;
- 6- The **Conference website was launched** on June, 2020. We started to advertise the Conference with more intensity after June, benefiting from a slow calm down of the pandemic in most of the European countries;
- 7- The **Plenary speakers were announced, the call for proposals for Research Streams and for Semi-Plenary sessions proposed by the Research Networks was launched** (July, 2020). The **proposals were selected** during August, 2020 and the final decisions sent to the colleagues on September, 2020, as previously scheduled;
- 8- The **Semi-Plenary sessions organized by the Executive Committee**, in line with what happened in past ESA Conferences, were discussed and clustered by November, 2020;

- 9- The Conference and the Executive Committees evaluated the Conference organization after the spread of the coronavirus pandemic and the **Conference dates were maintained**, but the expectations were reframed according to the difficult context. We continued to work for the Conference as it is one of the most important activities of ESA and also because the EC considered that it was more important than ever that sociologists work together and share ideas for *alternative futures*;
- 10- A **contingency plan including four different scenarios was designed** and discussed by the LOC and the Conference Committee (please see annex);
- 11- The **financial dimension of the contingency plan for the Conference** in order to update and revise the preliminary Conference budget with scenarios for income was designed (lead by the colleagues of the Finance Committee in articulation with the CC);
- 12- **An online meeting with the Research Networks' coordinators on the format of the Conference** (December, 2020) was prepared and mediated by the President, the Conference Chair and the Chair of the RNs;
- 13- **Conftool was configured and launched** within the previewed schedule;
- 14- The **Conference Assistant was recruited during December, 2020** with the involvement of the President, the Conference Chair, the LOC and the Office;
- 15- A **work plan for the Conference Assistant was organized** including: building bridges between the Executive Committee and the LOC, communication strategies for social media and mailings, contacts with speakers and delegates, coordination of the abstract submission process, finalizing the description of the Semi-Plenary sessions and further steps until the Conference dates.
- 16- **The challenges imposed by the pandemic and the decision on the format of the Conference I:** after consultation of the RNs Coordinators and the registered users in Conftool (it was decided to insert a specific question in Conftool to ask potential Conference delegates about their preferences of attendance), the CC and the EC evaluated the situation carefully in several meetings. The following data was crucial to the final decision: a) 74% of registered participants (2493) have expressed their desire to travel to Barcelona, while 26% (889) have stated that they rather attend online; b) a considerable number of Research Coordinators indicated that the hybrid format was more suitable; c) other local information gathered by that moment by the LOC. The ESA Executive Committee decided to **hold the Conference on a hybrid format** by January, 2021.

- 17- **The challenges imposed by the pandemic and the decision on the format of the Conference II:** Later, in April 2021, the Executive Committee and the Local Organizing Committee reevaluated the context, considering the following items: pandemic indicators (less promising than what experts had foreseen by the end of 2020); vaccination rates (under the previous expectations); availability and conditions for space use in different locations in Barcelona (limitations of venues occupation and requests to assume civil responsibility in front of possible cases of contagion); eligibility of travel expenses for onsite participation (some universities were not covering these expenses).  
After evaluating the available information, **it was decided to finally hold the Conference in an online-only format.** The decision was communicated to the Conference participants by May, 10<sup>th</sup>.
- 18- **The deadline for abstract submission was postponed as usual** in ESA Conferences for 2 weeks;
- 19- The **deadline for abstract reviewing** was also set within an expectable timeframe; **decisions about acceptance or rejection were sent to the authors on time;**
- 20- The **abstracts rejected for the Summer School were resend to the Research Networks and the Research Streams Coordinators** for consideration;
- 21- A total of **4122 abstracts were submitted for presentation through Conftool, distributed over 103 tracks. Abstract submission was higher than that of the last Conference** (please see the Conference report for more details);
- 22- The **cancelation policy was discussed and defined;**
- 23- The **participant registration in Conftool opened;**
- 24- **Two new awards were created after approval by the Executive Committee: the ESA Best Article Award**, discussed at online meetings and e-mailing with the Chair and colleagues of the Publications Committee and the ESA Journals editors; the **ESA Young Scholar Award** was discussed and planned in articulation with the Post-Graduate Committee Chair and colleagues; the awards were widely spread in social media and the winners were invited to present their papers at a special session at the Conference;
- 25- Proposals for **Midday and Evening Special Sessions** were collected and decisions were taken by the Conference Committee and finally approved by the EC;

- 26- The **contract with CVENT, the online platform for the Conference, was completed** after consulting several company proposals; the LOC lead the task of collecting the proposals;
- 27- **Hackathon:** On April 17th-18th the LOC held the first #ESAHackathon in relation to the ESA Conference, in articulation with the ESA Conference Committee and with the support of the Conference Assistant. 103 participants from 23 different countries registered for the activity either as participants or mentors. Participants engaged in discussions using the Discord channel (more details can be found in the Conference Report);
- 28- **Preparation and configuration of the Conference hub:** the Conference Assistant has participated in a training to configure the different options for the online hub. The ESA President, the Conference Chair and the Conference Assistant were also present in different meetings with the technical staff to set the Conference hub;
- 29- **The LOC has taken charge of volunteer recruiting:** Training sessions online were also prepared and counted with the participation of the LOC colleagues, its Chair, the ESA President and the Conference Chair;
- 30- **The LOC with the support of the Conference Assistant and the Conference Chair, centralized the interactions with international exhibitors.** A brochure with options and fees was prepared for the exhibitors. The Conference counts with 8 exhibitors and 5 sponsors;
- 31- The **Conference Programme was made available to all the Conference delegates in Conftool by July, 19th. The outline programme of the Conference was published online on August, 12<sup>th</sup>.** The Conference Programme is configured by **924 sessions**, including Plenary and Semi-Plenary sessions, Midday and Evening Specials, RN / JS / RS sessions, Fringe Events and the social programme;
- 32- **Social Media Strategy:** Since January 18<sup>th</sup>, ESA's Twitter account has been active on a regular basis. Since the beginning of January, ESA's account has gained over 1.324 followers. It has received a total of 44.618 visits. In this period, 178 tweets have been published, with a total of 535.000 Tweet impressions. Two accounts for the Conference Dissemination were also created in Facebook and Instagram back in February, 2021 (more details can be found in the Conference report);
- 33- **Final tasks to complete after the Conference dates:** Publication of the Abstract Book and elaboration of the final Conference budget.

# ESA2021BCN Conference report

## Introduction

This report presents a summary of the progress done in the preparation of the ESA2021BCN Conference to August 17<sup>th</sup>, 2021. It presents information on:

1. Abstracts in Conftool
2. Registration of participants in Conftool
3. Social Media strategy & mailing
4. Online Platform & Outline Programme
5. LOC
  - a. Hackathon
  - b. Volunteers
  - c. Exhibitors & Sponsors

## Abstracts in Conftool

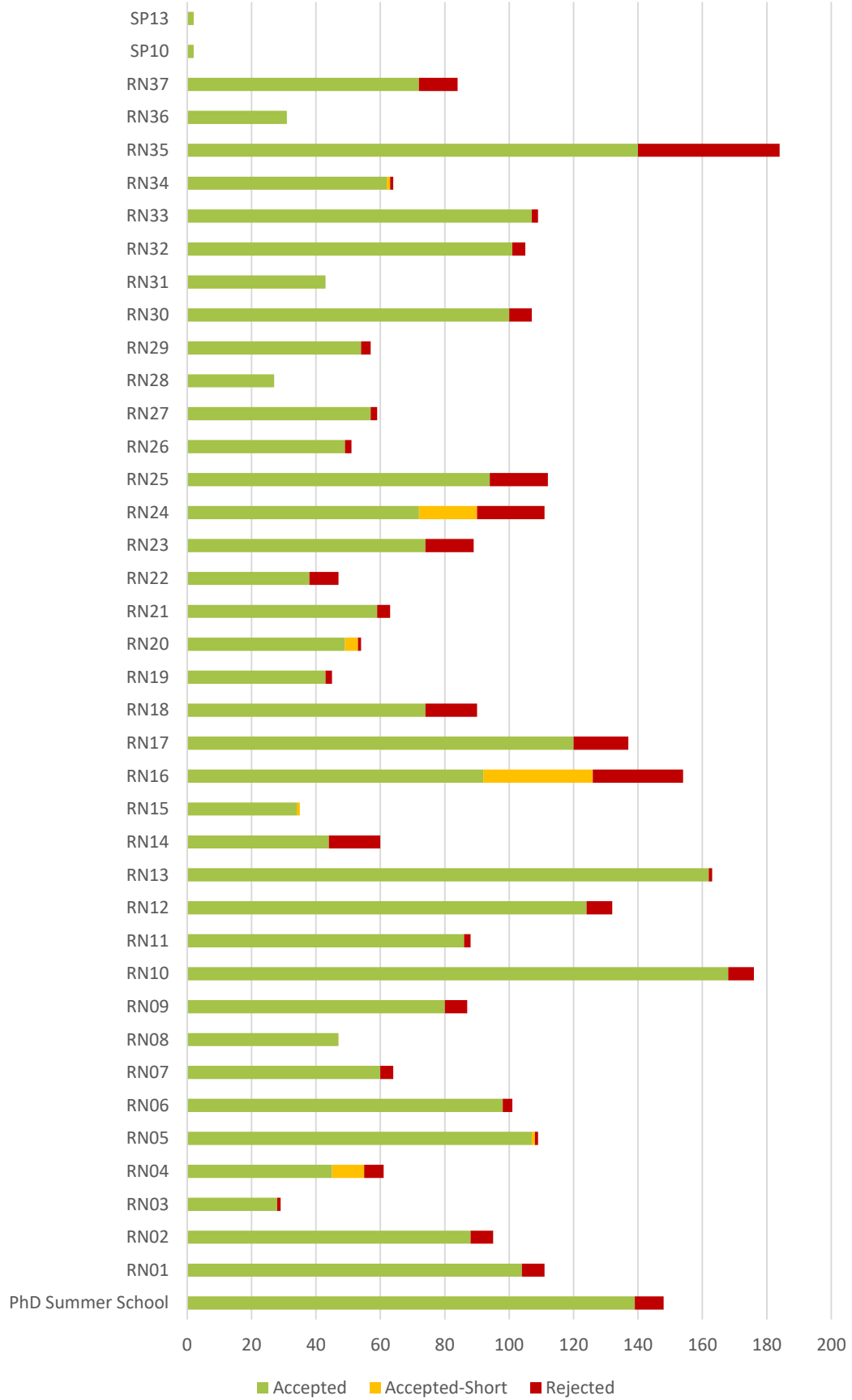
A total of **4122 abstracts** were submitted for presentation through Conftool by the deadline, distributed over 103 tracks. **Abstract submission was higher than that of the last Conference.** Finally, **3517 abstracts** have been included in the Conference Programme. The top-ten tracks by number of abstracts to be presented at the Conference are the following:

Track	Number of abstracts	%
RN35 - Sociology of Migration	158	5%
RN13 - Sociology of Families and Intimate Lives	150	4%
RN16 - Sociology of Health and Illness	149	4%
RN10 - Sociology of Education	143	4%
RN17 - Work, Employment and Industrial Relations	119	3%
RN12 - Environment and Society	116	3%
RN01 - Ageing in Europe	100	3%
RN24 - Science and Technology	99	3%
RN25 - Social Movements	97	3%
RN05 - Sociology of Consumption	95	3%

## Acceptance status

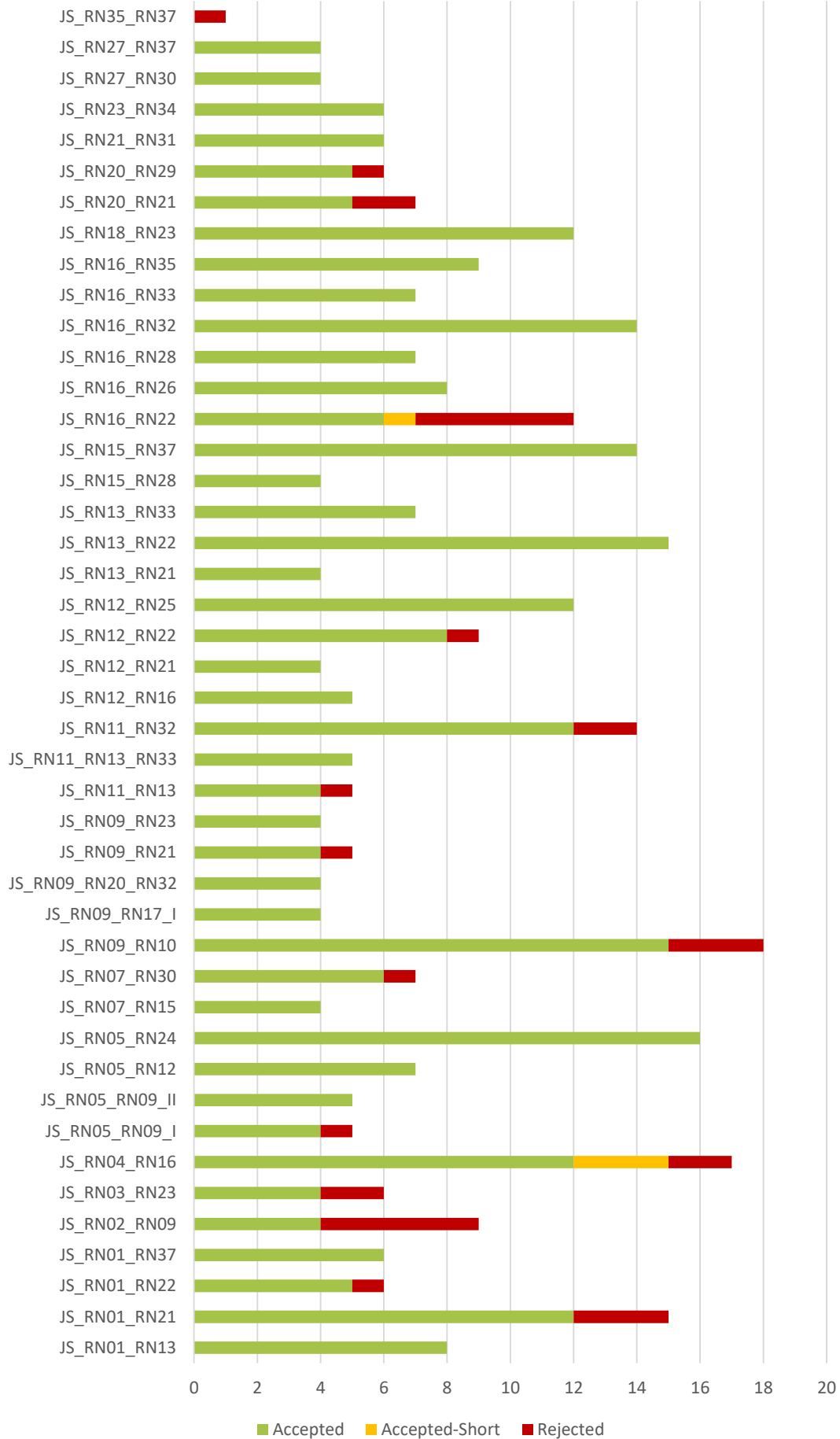
At this point, **3634 papers (88%) have been accepted** for presentation at the Conference, either as full oral presentation (accepted - 86%) or as short-accepted (2%), **while 8% of the submitted papers have been rejected.** 148 papers were submitted to the PhD Summer School. The following charts shows acceptance status of submissions by track:

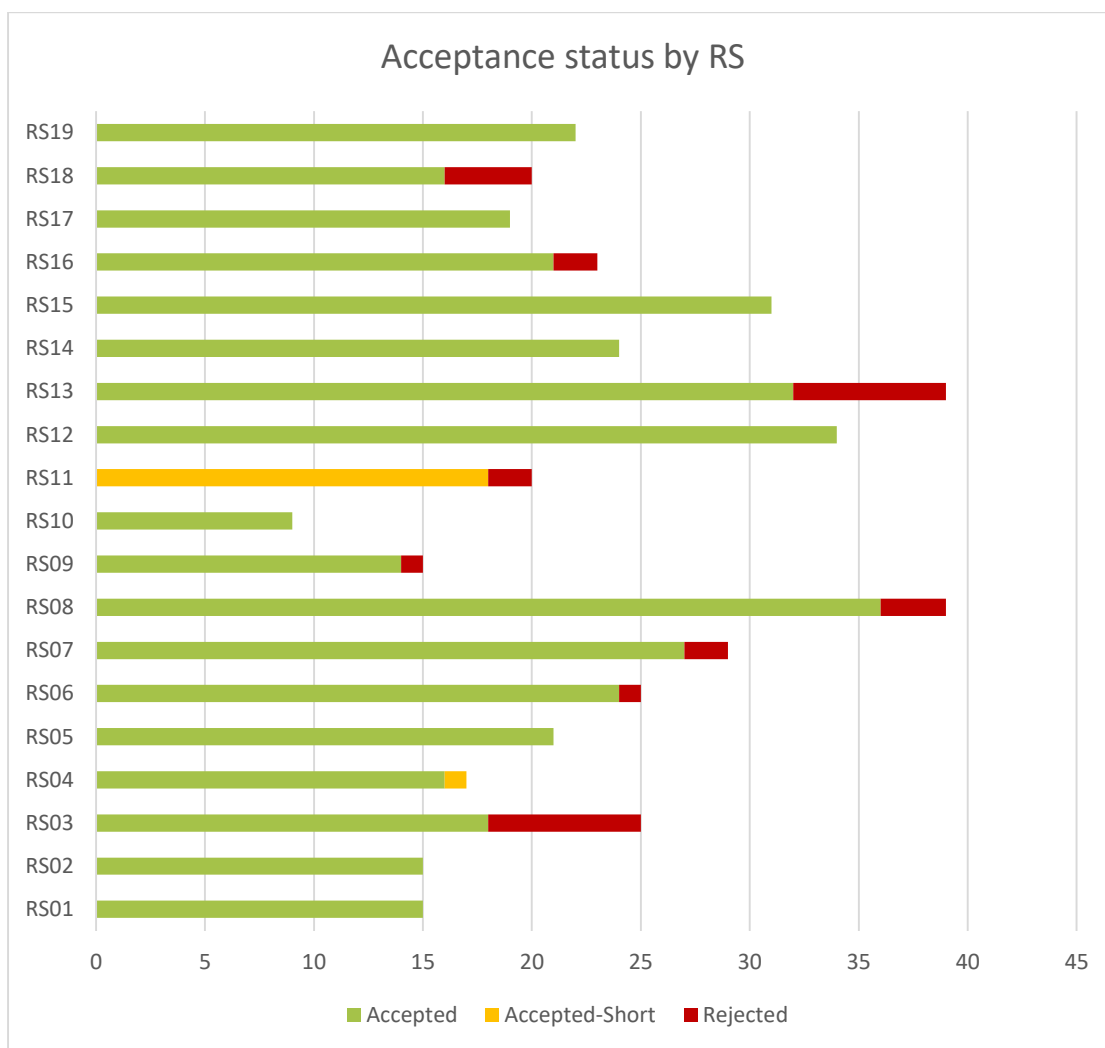
### Acceptance status by RN





### Acceptance status by JS





### *Sessions in Conftool*

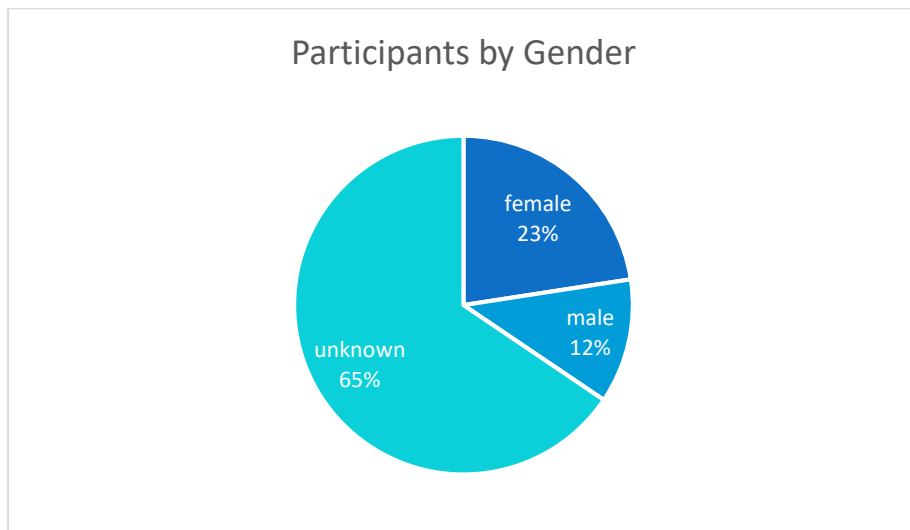
At this point, the Conference Programme is configured by **924 sessions**, including Plenary and Semi-Plenary sessions, Midday and Evening Specials, RN / JS / RS sessions, Fringe Events and the social programme.

## Registration of participants in Conftool

As of August 17th, 2021, there are 3851 registered participants from 74 countries.

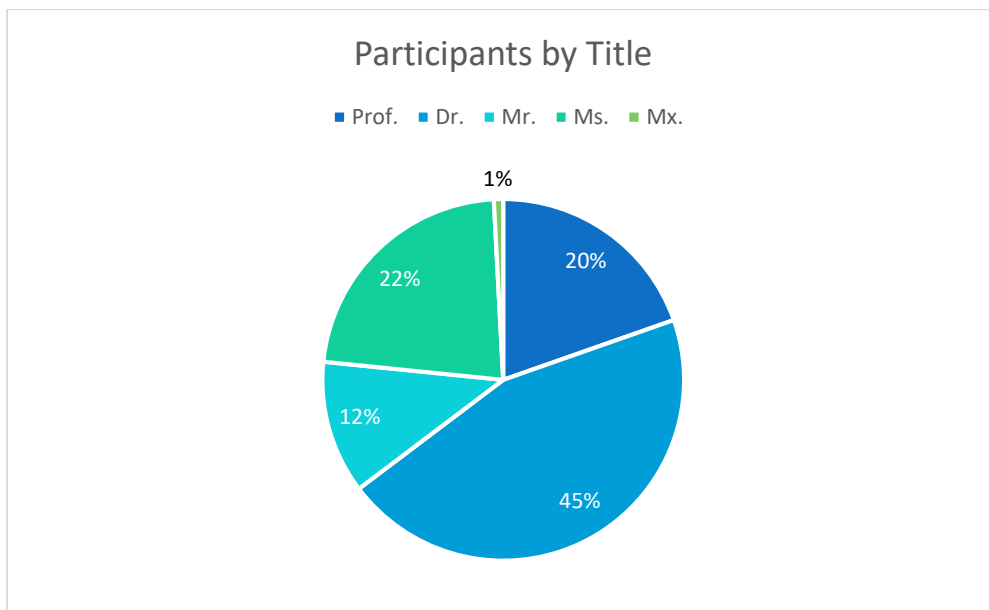
### Participants by gender

**23% of registered participants (869) are female and 12% (458) are male.** The rest of participants did not state their gender.



### Participants by title

**65% of registered participants (2492) choose an academic title (Dr. or Prof),** while 35% (1359) did not.

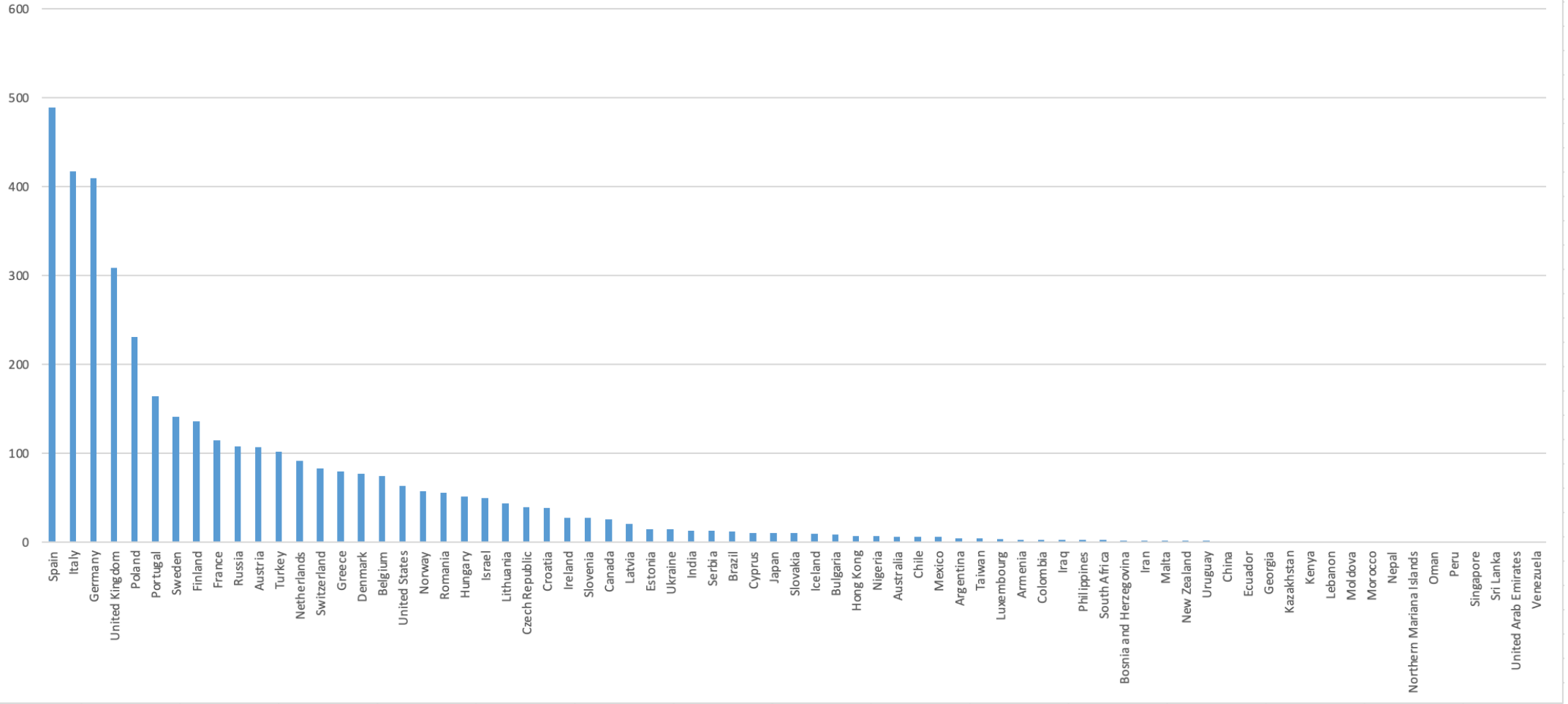


*Participation by country*

The **top 10 countries** represented by participants' registration are:

<b>Country</b>	<b>Participants</b>	<b>%</b>
Spain	489	13%
Italy	417	11%
Germany	410	11%
United Kingdom	309	8%
Poland	231	6%
Portugal	164	4%
Sweden	141	4%
Finland	136	4%
France	115	3%
Russia	108	3%

Participants by Country



## Social Media Strategy & Mailing

### Twitter

Since January 18<sup>th</sup>, ESA's Twitter account has been active on a regular. Since the beginning of January, ESA's account has gained over 1.324 followers. It has received a total of 44.618 visits (an average of 5.949 visits/month). In this period, 178 tweets have been published, with a total of 535.000 Tweet impressions (3006 impression/tweet on average).

#### AUG 2021 SUMMARY

Tweet impressions  
**17.8K**

Profile visits  
**795**

Mentions  
**26**

New followers  
**71**

#### JUN 2021 SUMMARY

Tweets  
**33**

Tweet impressions  
**72.7K**

Profile visits  
**5,127**

Mentions  
**37**

New followers  
**197**

#### APR 2021 SUMMARY

Tweets  
**32**

Tweet impressions  
**94.6K**

Profile visits  
**8,659**

Mentions  
**80**

New followers  
**197**

#### FEB 2021 SUMMARY

Tweets  
**33**

Tweet impressions  
**137K**

Profile visits  
**10.8K**

Mentions  
**101**

New followers  
**283**

#### JUL 2021 SUMMARY

Tweets  
**3**

Tweet impressions  
**25.8K**

Profile visits  
**3,362**

Mentions  
**22**

New followers  
**125**

#### MAY 2021 SUMMARY

Tweets  
**29**

Tweet impressions  
**60.6K**

Profile visits  
**5,709**

Mentions  
**48**

New followers  
**114**

#### MAR 2021 SUMMARY

Tweets  
**31**

Tweet impressions  
**84.7K**

Profile visits  
**5,436**

Mentions  
**78**

New followers  
**163**

#### JAN 2021 SUMMARY

Tweets  
**14**

Tweet impressions  
**41.8K**

Profile visits  
**4,134**

Mentions  
**88**

New followers  
**174**

The Tweets with a greater engagement include those related to the Hackathon, Plenary & SP speakers, Ricca Edmondson and Conference Announcements

Aug 2021 • 16 days so far...

TWEET HIGHLIGHTS

**Top Tweet** earned 410 impressions

It is with great sadness that we share the passing of Ricca Edmondson. She was an ExeC member, coordinator of [@ESA\\_Ageing](#) & a pillar in the development of [@EJCPS\\_journal](#). Her death is a profound loss. We will all miss her. [europeansociology.org/emeritus-prof...](http://europeansociology.org/emeritus-prof...) [pic.twitter.com/ei7EsiWDqG](https://pic.twitter.com/ei7EsiWDqG)



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Jul 2021 • 31 days

TWEET HIGHLIGHTS

**Top Tweet** earned 6,448 impressions

Check [#esa2021BCN](#) semi-plenary speakers!  
SP12 - The public role of National Sociological Associations towards alternative futures counts on [@hanafi1962](#), president of the International Sociological Association ([@isa\\_sociology](#)). Check his bio below [bit.ly/3t6tBKd](#) [pic.twitter.com/fzeww1D2cW](https://pic.twitter.com/fzeww1D2cW)

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Jun 2021 • 30 days

TWEET HIGHLIGHTS

**Top Tweet** earned 8,448 impressions

Happy to announce our next [#esa2021BCN](#) Plenary Speaker! Prof [@alondra](#) is a scholar of science, technology, medicine & social inequality. She serves as Deputy Director for Science & Society for the White House Office of Science & Technology Policy [bit.ly/3zwFxsq](https://bit.ly/3zwFxsq) [pic.twitter.com/Mw9ywXt655](https://pic.twitter.com/Mw9ywXt655)



**Alondra Nelson**

15th ESA Conference  
31 August - 3 September 2021  
Barcelona, Spain

[www.europeansociology.org](http://www.europeansociology.org)  
[#esa2021BCN](#)



←  
↓  
↓

May 2021 • 31 days

TWEET HIGHLIGHTS

**Top Tweet** earned 5,605 impressions

Just a friendly reminder: Early Bird Registration for [#esa2021BCN](#) ends on Saturday, May 22nd! You can follow the link to register now [conftool.pro/esa2021](https://conftool.pro/esa2021) [pic.twitter.com/pZsrlOhCwH](https://pic.twitter.com/pZsrlOhCwH)

↪ 8

↪ 1 ↻ 5 ❤ 10

↪ 2 ↻ 60 ❤ 65

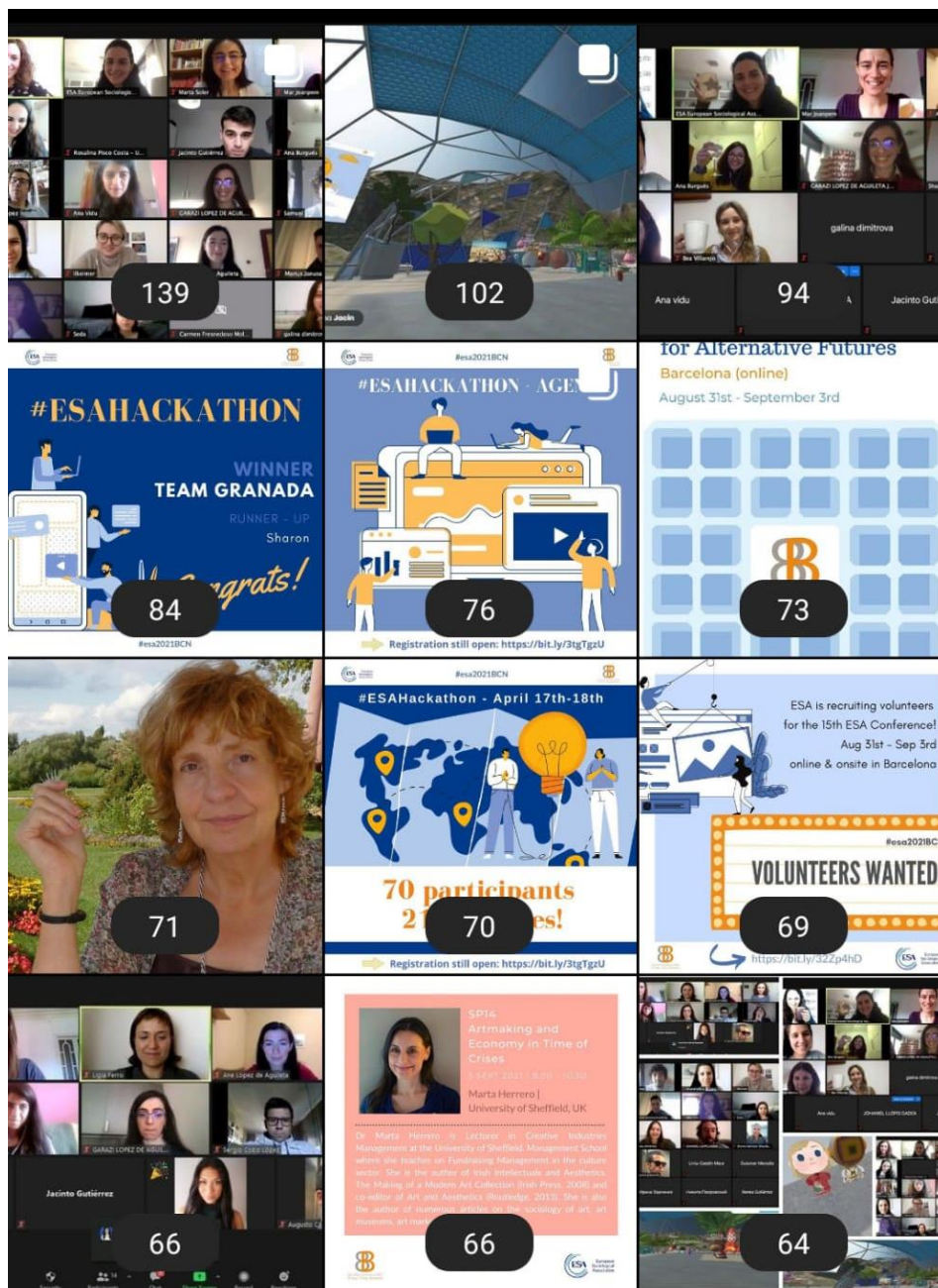
March 1st

## Facebook

Since its creation in February 2021, ESA's 15<sup>th</sup> Conference Facebook account has gained 184 followers. Facebook analytics are no longer available.

## Instagram

Since its creation in February 2021, ESA's 15<sup>th</sup> Conference Instagram account has published 85 posts and gained 117 followers. The 5 top post with a higher outreach were related to the hackathon.





### *Email*

Finally, bulk emails have been sent to members and registered users in Conftool to reach as well those who are not active in social media. These emails have been related to the submission of abstracts, review results, registration and the Hackathon.

### **Online Platform & Outline programme**

ESA has acquired the services from the Cvent virtual platform. The Conference Assistant has participated in a training to configure the different options for the online hub. At this point, all sessions have been created and the platform provider is finalizing speaker onboarding.

As well, the Outline Programme was published on 12.08.2021. This documents gathers all relevant information concerning the Conference, including the scientific programme, the social programme, information on the elections and practical information to follow and enjoy the Conference throughout.

### **LOC**

The following tasks have been undertaken to give support to the LOC:

#### *Hackathon*

On April 17<sup>th</sup>-18<sup>th</sup> the LOC held the first **#ESAHackathon** in relation to the ESA Conference, with the support of the Conference Committee. 103 participants from 23 different countries registered for the activity either as participants or mentors.

Over the weekend, participants engaged in discussion in the Discord channel habilitated to that end. Participants organized themselves in groups to develop their ideas and proposals. As well, the LOC organized 3 virtual breaks that served as networking spaces.

At the end of the weekend, 3 proposals were submitted, of which two are valid. Both are related to the area of junior sociologists, with one aimed at fostering networking spaces for sociology students, while the second one is focused on the production of a podcast.

All participants valued the experience very positively. More specifically, they expressed that they valued the opportunity of having their voices heard in the preparation of the Conference, so this could be more meaningful to them, and how the hackathon had been a chance to getting to know sociologists from other locations.

#### *Volunteers*

The LOC has taken charge of volunteer recruiting and onboarding. To this end, the following tasks have been prepared:

- Preparation of the registration forms

- Call for volunteers
- Process of selection & recruitment
- Preparation of manuals for volunteers
- Training
- Certifications

### *Exhibitors & Sponsors*

The Conference Assistant and the Conference Chair were coordinating with the LOC to centralize all interactions with international exhibitors. A brochure with options and fees has been prepared for the exhibitors. At this moment the Conference counts **on 8 exhibitors and 5 sponsors**, as follows:

<b>Exhibitors</b>	<b>Sponsors</b>
Bristol University Press	Institut d'Estudis Catalans
Cambridge University Press	MAXQDA
Frontiers in Sociology	Polity
Polish Academy of Sciences	Taylor & Francis
Respondi	World (MDPI)
Springer Nature	
Social Sciences (MDPI)	
Sustainability (MDPI)	

## Annex - The #ESA2021BCN Conference Contingency Plan

The Conference Committee worked on a contingency plan together with the LOC. This involved organizing several online meetings with the members of these committees. The plan included the following four possible scenarios:

### Scenario 1. A world without COVID-19

Presential Conference, partially hybrid: Face to face meeting in BCN, and possibility to follow plenaries & semi-plenaries in life streaming.

Paper presentations only face to face.

Venues: The LOC will work towards holding the Conference in a feasible distance for delegates. Thus, we will also work to have Plenary and Semi-Plenary sessions to be allocated in rooms with life streaming facilities.

### Scenario 2. A world with COVID-19 under control without legal restrictions

(virus is still circulating, but there are treatments and tests available, no official limitations are in place, however, people might be reluctant to travel).

Hybrid Conference: Face to face meeting in Barcelona as well as in life streaming.

Paper presentations only face to face. Those who want to register for the remote participation can get a certificate to get credit for it, but they cannot present a paper. Two registration fees will be in place to differentiate delegates who come face to face from those following the Conference online.

The face to face meeting will be considering all the precautions recommended by the WHO and the scientific community.

If travel restrictions are in place in particular countries, we can explore the possibility to facilitate online paper presentations for those. (the Conference Committee defined legal restrictions to travel, health and political reasons.)

LOC: We will try to accommodate all the Plenary sessions in rooms with life streaming facilities. In the case of RN sessions, the LOC will try to provide to each RN a room with life streaming.

### Scenario 3. A world with COVID-19 with legal restrictions affecting the regular development of the face to face Conference (e.g. confinement, capacity limitations)

Hybrid Conference: Face to face meeting in Barcelona as well as in live streaming. Delegates can present papers online and in person.

The face-to-face meeting will be considering all the precautions recommended by the WHO and the scientific community. Two registration fees will be in place to differentiate delegates who come face to face from those following the Conference online. Materials will be only available for those attending face to face.

LOC:

- Face-to-face Conference might be allocated in a more decentralized manner throughout the city, to obtain as many as well-equipped rooms to life stream. Our goal will be (if possible) to provide each RN to have at their disposal a room with life streaming.
- In order to accomplish with legal restrictions, the LOC will seek for open spaces to celebrate the Plenary and Semi-Plenary sessions.

#### Scenario 4. ESA BCN 21 in the context of an ongoing pandemic

Virtual Conference: There is not going to be a face-to-face meeting in BCN, all sessions will be conducted online.

LOC will not need to arrange anything in place, but we are willing to work to organize highly creative virtual activities around the city of BCN.

## Report of the Chair of the ESA Policy Committee

### 1. ESA STATUTES

#### **Background:**

A recurring topic of discussions during Executive Committee meetings had been ways by which the organizational structure and the functioning of the ESA could better fit the 21<sup>st</sup> century needs of our association. Among other things, the 2017-2019 Executive Committee postulated a review of ESA governance and operations. Therefore, the President and Executive Committee requested of the Policy Committee a proposal for modifications and changes to the ESA Statutes and in the ESA Office itself, especially with regards to the duties and responsibilities of the Executive Secretary.

In response, the Policy Committee prepared a proposal for suggested modifications to specific provisions of the Statutes to be presented before the membership for discussion and approval. The changes projected will streamline the functionality of the ESA's administration, adapt it to today's needs, clarify the roles of both the Executive Committee and the Executive Secretary, and more closely align the organizational structure of the ESA with that of the ISA.

#### **Activities:**

An outcome of a few rounds of consultation and conferral (including, among others, the President and Executive Committee members) was that the Policy Committee was asked to elaborate an official proposal for modifications to the ESA Statutes. That proposal was presented for formal discussion at the Executive Committee meeting on 7 May 2021.

In accordance with Article 13.1 of the ESA Statutes, changes to those Statutes may be proposed to the membership upon a 2/3 majority vote passing the Executive Committee. During the ESA Executive Committee meeting held on 7 May 2021 – and after full deliberations on the proposal – the Executive Committee unanimously accepted the proposal and univocally recommend it to the membership. The modifications endorsed by the Executive Committee read as follows:

#### **Article 6: The President and the Executive Committee**

##### **Article 6.4**

##### ***Original Text***

6.4 The President appoints a General Secretary and an Executive Secretary. The Executive Committee, with the advice of the President, appoints three Vice-Presidents and a Treasurer from within the Committee. The President, the General Secretary, the Treasurer and the Executive Secretary constitute the ESA Office. The ESA Office reports to the Executive Committee and is responsible for implementing its decisions.

**It is proposed that Paragraph 6.4 be replaced by the following language:**

6.4 The President appoints an Executive Secretary. The Executive Committee, with the advice of the President, appoints three Vice-Presidents and a Treasurer from within the Committee.

**Article 6.8**

***Original Text***

6.8 The General Secretary keeps the records of the Association and supervises the work of the Office. The General Secretary has the power to engage the Association, sign bills and invoices, and use the Association credit card within limits of a given authorization.

**It is proposed that Paragraph 6.8 be replaced by the following language:**

6.8 The Executive Secretary is in charge of the administrative affairs of the Association and the organisation of the Office. S/he reports to the Executive Committee and is responsible for implementing its decisions.

The Executive Secretary, in consultation with the Treasurer and the President, draws up a budget each calendar year for approval by the Executive Committee.

The Executive Secretary is empowered by the President to engage the Association, sign bills and invoices, and use the Association credit card within limits of a given authorization set by the Executive Committee in consultation with the Treasurer.

The remuneration of the Executive Secretary and of other members of the staff of the ESA shall be determined by the President in consultation with the Treasurer and the Executive Committee.

**Article 14: Dissolution**

**Article 14**

***Original Text***

In the event of dissolution, the net assets of the Association shall be transferred to an international organisation or institution whose objectives are similar to those of the Association. The use of the assets shall be decided by the General Assembly, which shall mandate the President or the General Secretary to execute its decision.

**It is proposed that the final paragraph of Article 14 be replaced by the following language:**

In the event of dissolution, the net assets of the Association shall be transferred to an international organisation or institution whose objectives are similar to those of the Association. The use of the assets shall be decided by the General Assembly, which shall mandate the President to execute its decision.

With regards to another matter taken under consideration, the Executive Committee concluded, after in-depth discussion, that formal institutionalization of advisory support by previous ESA presidents would be inexpedient.

According to Article 5 of the ESA Statutes, changes to the Statutes and Bylaws must be announced twelve weeks in advance. The aforementioned changes to the ESA Statutes were therefore presented to the membership (for its consideration and approval) on 11 June 2021 via the ESA website, under the following hyperlink: <https://www.europeansociology.org/message-executive-committee-general-assembly>.

In placing this proposal before the membership, the Executive Committee is acting in line with the underlying principles of the ESA. Coincidentally, the Covid-19 pandemic – which introduced new working conditions and new platforms for online communication – illustrated novel, rational, and ecological solutions, decreasing the need for physical, face-to-face operations. The changes made to the Statutes will facilitate:

- adaptation of the functionality of the ESA administration to 21<sup>st</sup> century demands;
- flexibility in the administrative structure of the ESA;
- adjustments in the scope of administrative support to match the varying needs of the ESA with regards to the organisation of ESA conferences at set intervals of time – similar to other international associations in the field of social sciences and sociology (e.g., ISA standards and practice);
- increases in the share of pro bono work contributed by ESA members.

## **2. ESA ETHICAL GUIDELINES**

### **Background:**

On 29 May 2020, the Solidarity Network of Victims of Gender Violence in Universities electronically submitted a suggestion to the Executive Committee, requesting that a new article regarding prevention and protection from sexual abuse in all its forms be added to the ESA Ethical Guidelines. The submission highlighted that ESA members are, in fact, already contributing sociological analyses in the vanguard of this issue.

### **Activities:**

According to Article 13.2 of the ESA Statutes, changes to the Bylaws and Ethical Guidelines may be proposed by the Executive Committee, by the Council of National Associations, by 20% of the individual membership, by three Research Networks or by three National Associations. The postulate that a new guideline be added to the ESA Ethical Guidelines was initially supported by RN34, RN29, and RN11, subsequently also joined by RN10. In the course of online consultations, the proposal won the unanimous support of the Executive Committee. The President of the ESA therefore turned to the Policy Committee with a request for preparation of a new, additional Ethical Guideline. The final version of the proposal to be set before the membership reads as follows:

It has been proposed that a new, additional ethical guideline be inserted between the current Ethical Guidelines 3 and 4 (requiring renumbering of the current Ethical Guidelines 4-12):

**Ethical Guideline 4** The ESA with its membership takes a stand against sexual harassment, revictimization, and second-order sexual harassment.

The aforementioned proposal has the full support of both the Executive Committee and four Research Networks (RN 34, RN 29, RN 11, and RN 10).

According to Article 5 of the ESA Statutes, changes to the Statutes and Bylaws must be announced twelve weeks in advance. The aforementioned changes to the ESA Statutes were therefore presented to the membership (for its consideration and approval) on 11 June 2021 via the ESA website, under the following hyperlink: <https://www.europeansociology.org/message-executive-committee-general-assembly>.

### **3. CODE OF CONDUCT FOR THE ESA EXECUTIVE COMMITTEE AND EMPLOYEES**

#### **Background:**

See previous Minutes for a thorough description.

#### **Activities:**

During the ESA Executive Committee meeting on 7 May 2021, a brief discussion was conducted on the provisions found in the new Code of Conduct for the ESA Executive Committee and Employees. The need for such a document was recognized. Due to the fact that no further comments were submitted regarding the initial project proposed by the Policy Committee, it was decided that the document would be sent for additional consultation and a vote on the adoption of the document during the ESA meeting on 30 August 2021.

### **4. GUIDELINES FOR ESA JOURNALS**

#### **Background:**

See previous Minutes for a thorough description.

#### **Activities:**

In accordance with the agenda adopted by the Executive Committee, discussions and voting on the approval of the Policy Committee's proposed changes to the Guidelines for ESA Journals will take place at the Executive Committee meeting on 30 August 2021. All remarks and suggestions made by participants in the consultation process (within the Policy Committee and Executive Committee, as well as by representatives of the preceding Executive Committee) will be discussed then. The final, prospective version of the document is found in the Attachments.



## **AGENDA FOR THE EXECUTIVE COMMITTEE MEETING ON 30 AUGUST 2021**

- Discussion and a vote to be taken regarding the Code of Conduct elaborated and prepared in written form by the Policy Committee.
- Discussion and a vote to be taken regarding proposals for changes in the Guidelines for ESA Journals, taking into serious consideration the suggestions made by participants during the rounds of consultation.

## **ATTACHMENTS**

1. Draft of the Code of Conduct for the ESA Executive Committee and Employees
2. Draft of the Guidelines for ESA Journals
3. Rationale for changes to the Guidelines for ESA Journals

## Report of the Council of National Association

The current Executive Committee and the Chair of the Council of NAs have been working to make more concrete the idea that the engagement of the NAs in ESA has to be continued and strengthened more than before.

In 2020, the NAs have been involved, through an explicit request by the Chair of the Council of NAs, to contribute to the Special issue of The European Sociologist “Pandemic (Im) Possibilities”, about the pandemic crisis. We received contributions from four NAs: the German, the Israelian, the Italian and the Portuguese Sociological Association, and one more, as a personal contribution, from the President of The Polish Association, K. T. Konecki.

The NAs have also been involved in ESA participation in the EUvsVirus Hackathon and made aware of the EASSH Position Paper about the challenges of the post-pandemic time, calling for the involvement of the Human and Social Sciences in the new European Framework Program (<http://www.eassh.eu/c/mission-covid-19-global-problems-need-research-portfolio>). This position paper suggests the following: a) support and fund research projects from different disciplines on Covid-19, including the studies of vital importance provided by the humanities, social sciences and creative arts; b) ensure the research approaches of social science and humanities are funded to contribute to current and future missions; and c) inform future research and policy strategies using insights emerging from the current crisis around the intersection between public health, structural inequalities, political systems, and cultural norms and values.

The Chair of the Council of NAs contributed, together with the Chair of the External Relations Committee, to the working out of rules and criteria for using ESA name and logo in external initiatives. A clear statement was made regarding NAs. National Associations, who are ESA members in good standing, may apply for the use of ESA name and LOGO when organizing Conferences and other initiatives involving ESA as a partner, through shared Call for papers or contributions (at least for one session). One member of ESA governing bodies (either the President or the Chair of NAs or their delegate) should be invited as a guest. In publications resulting from these Conferences or initiatives ESA name can also be used.

Two new initiatives for involving the Nas in ESA life were taken in 2021.

- a) The first one regards the ESA Conference Program: for the first time, a Semi Plenary has been organized on behalf of the NAs and with the support of the Executive Committee within the Barcelona ESA Conference: the invited speakers are Sari Hanafi, The President of ISA, and three NAs Presidents: Manuel Fernandez Esquinas (Federacion Espanola de Sociologia), Paula-Irene Villa (German Sociological Association), Anna Wellely (Hungarian Sociological Association). The program is attached to this report.
- b) The second one regards the ESA elections procedure. The NAs have been involved, through an explicit request sent to them by the Chair of the CNAs, to contribute to proposals for the Nomination Committee who will manage the elections for the next term (President, Executive Committee, Chair of the RNs Council, Chair of the Council of NAs. Three proposals came and were supported by the Chair of the Council of NAs, proposing to include them in the Nomination Committee.

Unfortunately, the pandemic caused the reiterated postponement of the scheduled time for the Conference of the ESA NAs, which was intended important to organize as an event in presence.

The proposal to organize on August the 30<sup>th</sup> – the day before the beginning of the ESA Conference – was presented and approved at the Spring Meeting of the Executive Committee.

However, this last minute proposal was not implemented because of difficulties in the direct involvement of the NAs in so a brief time (in many case communication is mediated by NAs secretaries and it does not easily reach current Presidents or their representatives).

A priority for the next ESA term is then to organize a Conference of the NAs.

The NAs should be once more invited to inform timely the ESA office about the turnover of their official representatives (President, vice-President, Executive Committee members) so to make effective the communication exchange between ESA and NAs and among NAs themselves through the ESA Council of NAs.

The Chair of the Council of NAs  
Maria Carmela Agodi