



Panorama de l'écosystème de la publication

Overview of the scholarly publishing ecosystem

Colleen Campbell

Open Access 2020 Initiative · Max Planck Digital Library

PRINTEMPS COUPERIN 2025

19 MARCH 2025

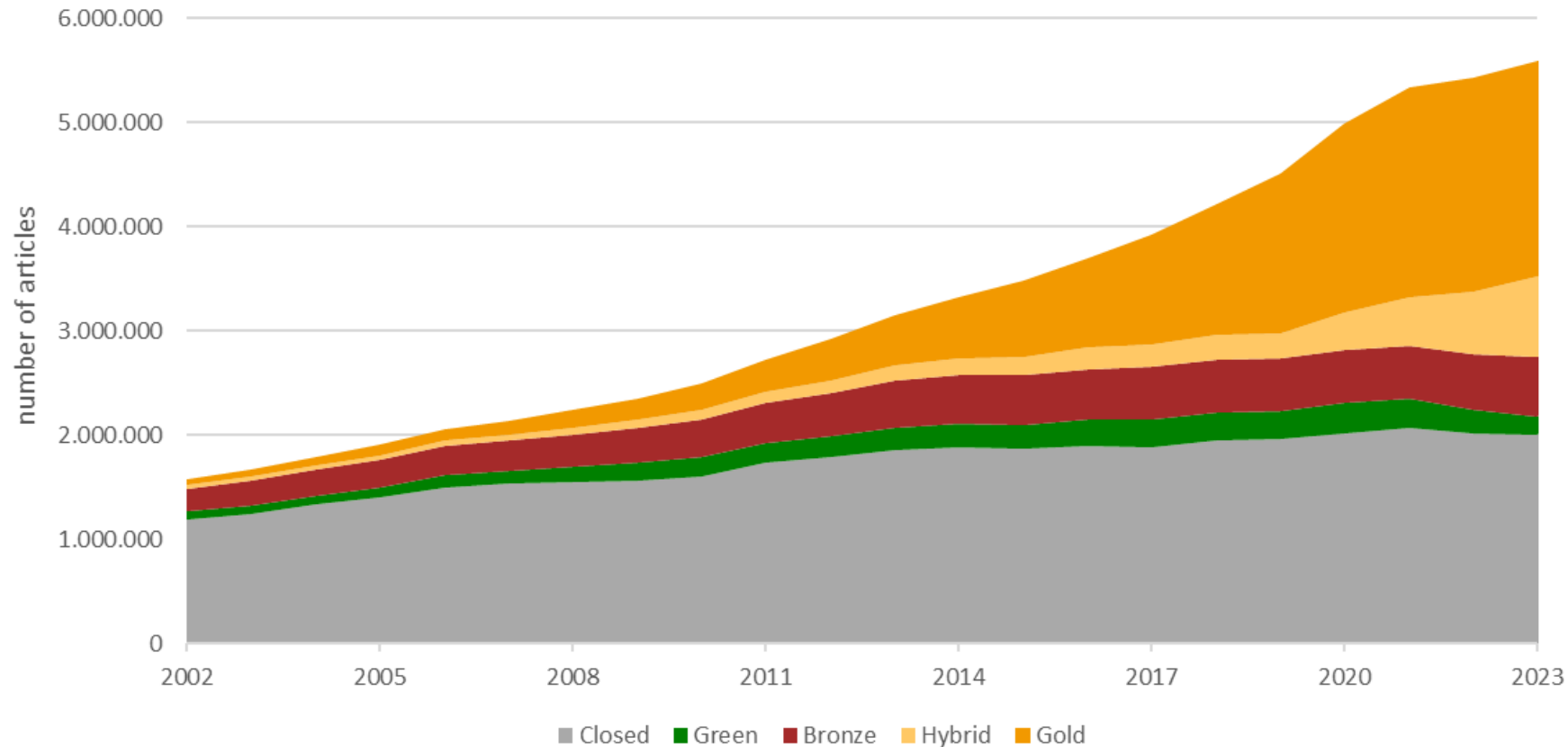


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The scholarly publishing landscape today

The scholarly publishing landscape

Continuous growth in scholarly publishing



Overall, research article output has grown consistently over the past decades.

Annual totals have increased from around 1.5M articles published in 2002 to approximately 5.5M published in 2023.

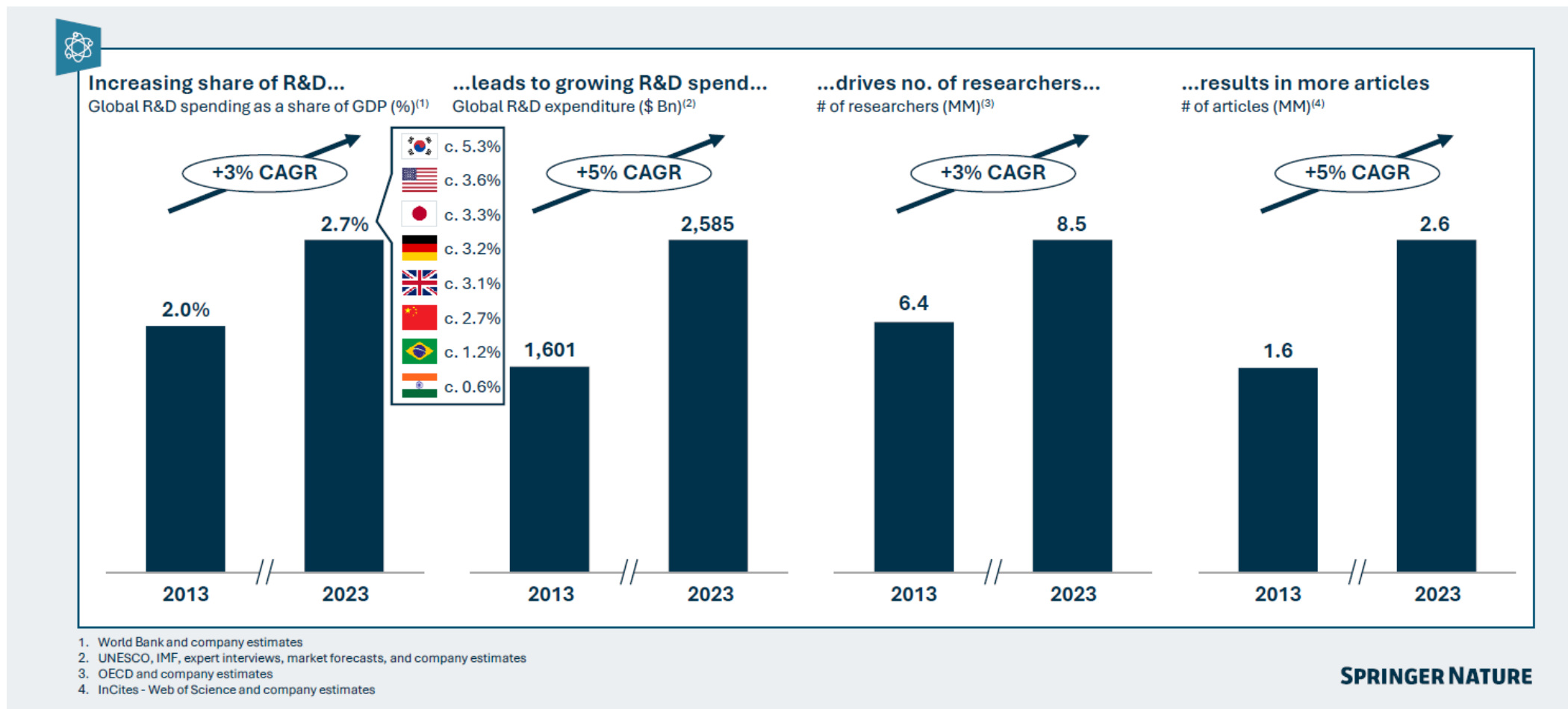
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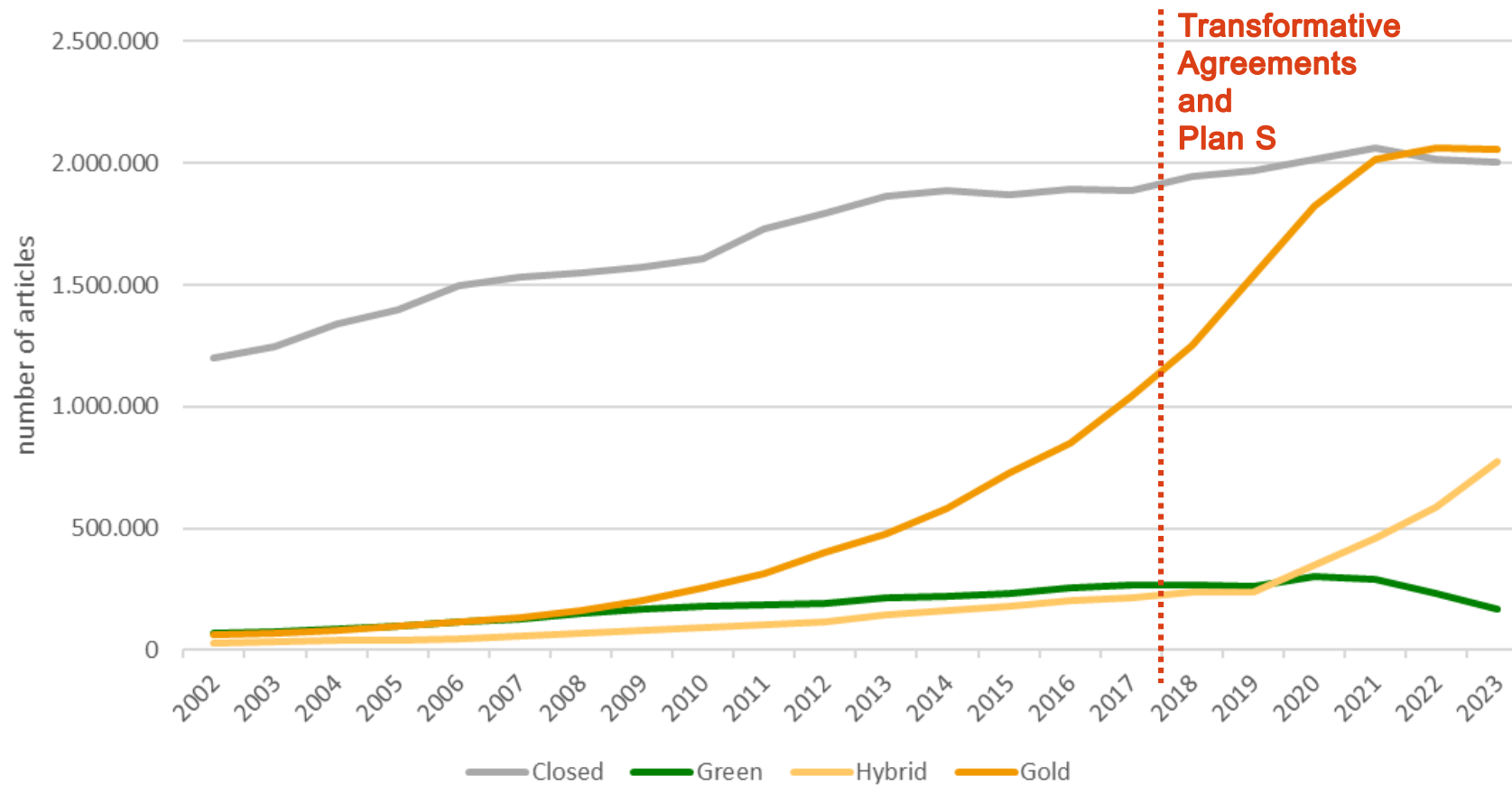
The scholarly publishing landscape

Continuous growth in scholarly publishing



The scholarly publishing landscape

Evolution of global open access publishing trends



Controlled hybrid open access under transformative agreements has played a key role in curbing growth in articles published beyond subscription paywalls while accelerating the shift to open access publishing

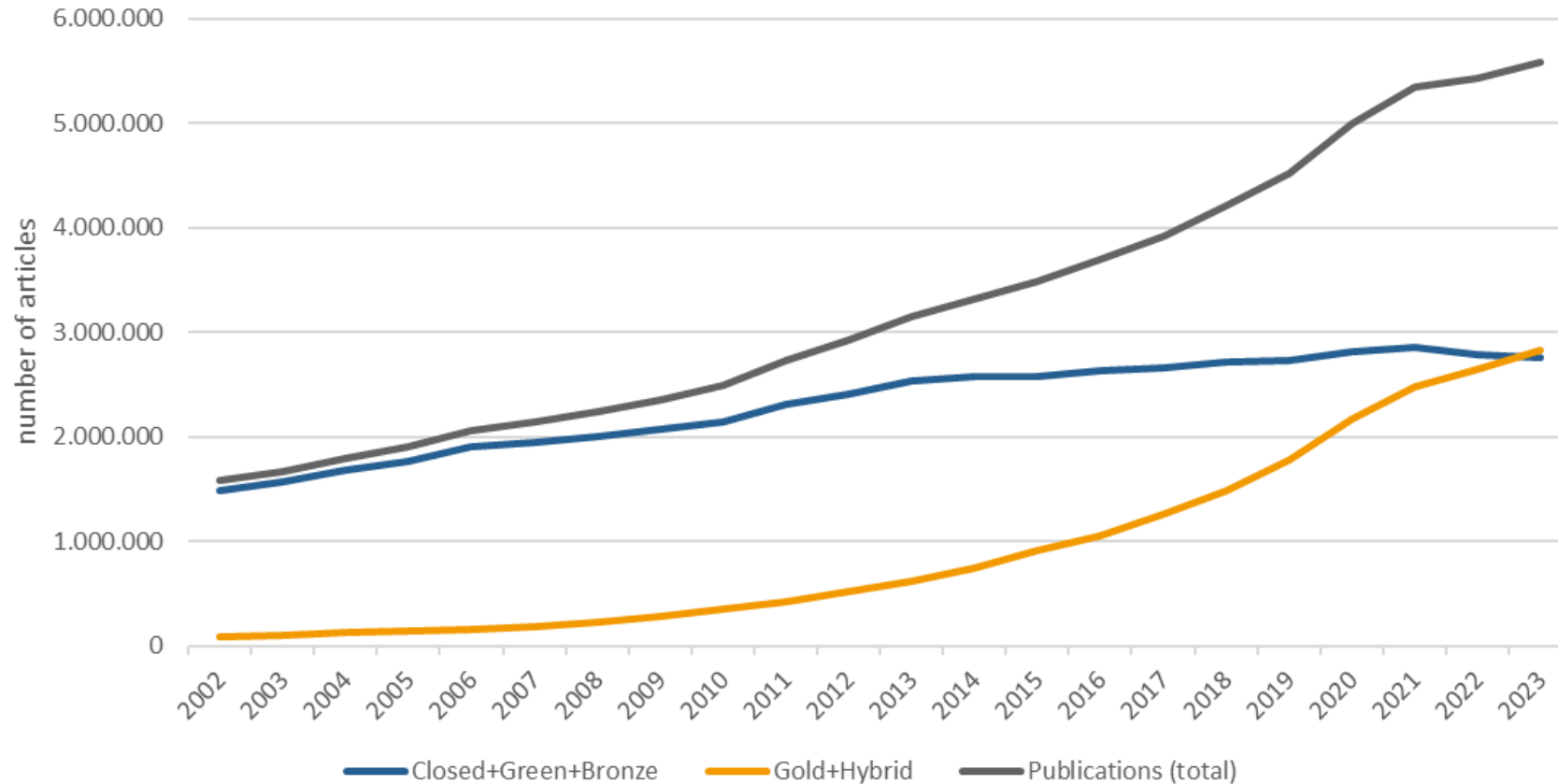
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The scholarly publishing landscape

Global open access publishing trends and copyright



Articles with publisher-held copyright are leveling off, while those with author-granted Creative Commons licenses have now surpassed them, highlighting the growing shift towards open access and author rights in scholarly publishing

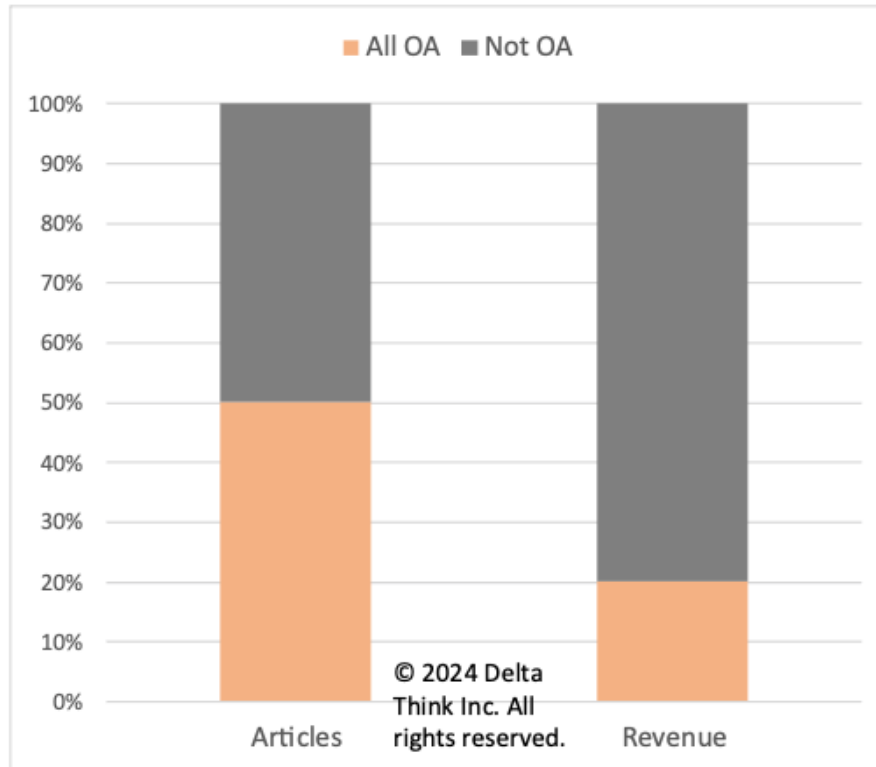
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The scholarly publishing landscape

Open access publishing and publisher revenues

Figure 1: Comparison of OA Article Share and Revenue Share, 2023



While open access now makes up 50% of the total article share, subscription-based publishing still drives 80% of publisher revenues.

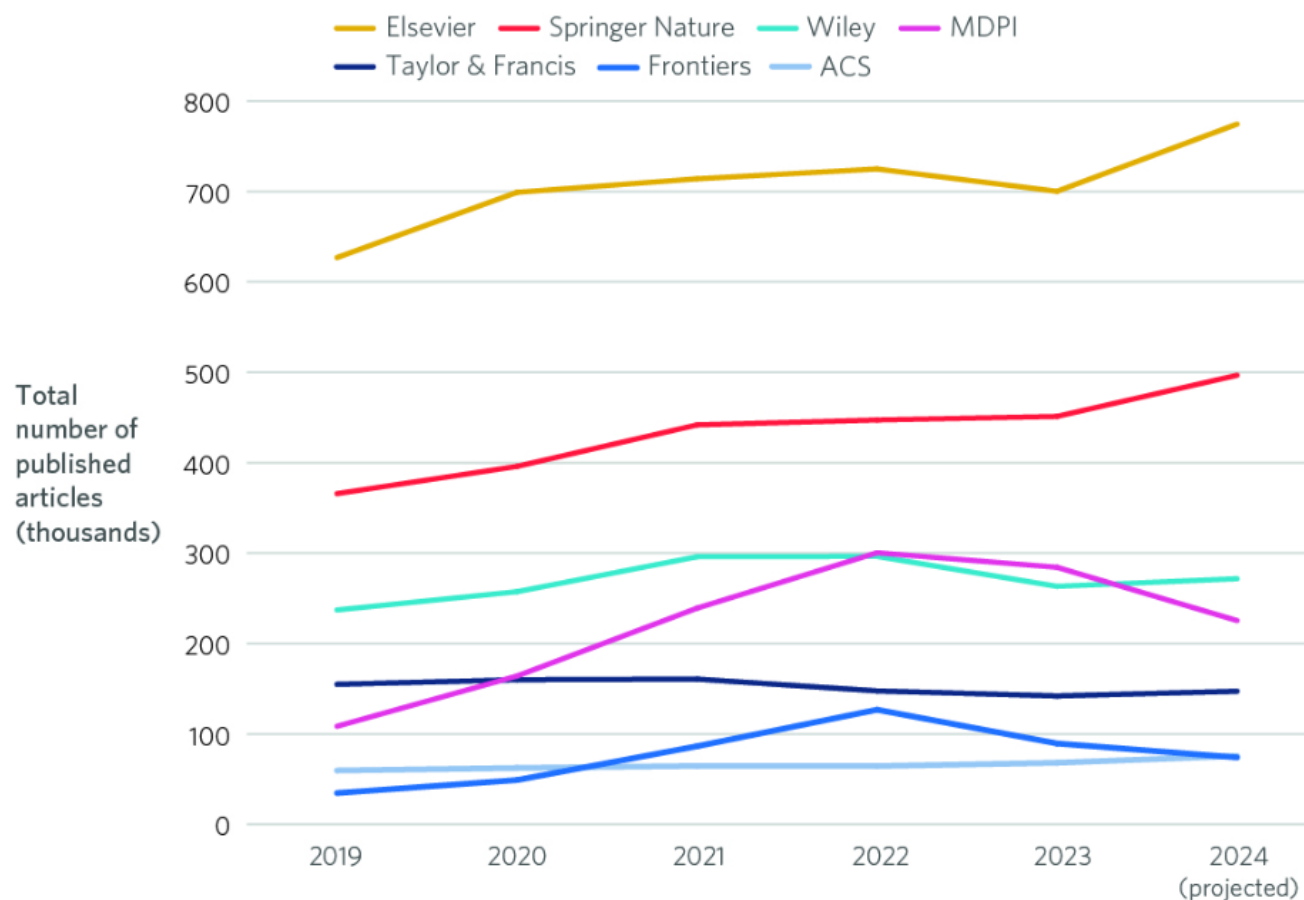
Open Access is not only a more equitable model but also significantly more affordable in the long term compared to subscription publishing.

Publisher insights

The scholarly publishing landscape

Total article output of select publishers

Total published article volumes for selected publishers, 2019-2024



“we have heard anecdotally from several publishers that their submissions are up by double digits and they attribute this entirely to the shift away from MDPI, Frontiers, and Hindawi.”

2024 projections extrapolated from first half year data. Results filtered to eliminate non-journal article content, such as conference abstracts, retraction notices, and front/back matter. Source: Dimensions (www.dimensions.ai).

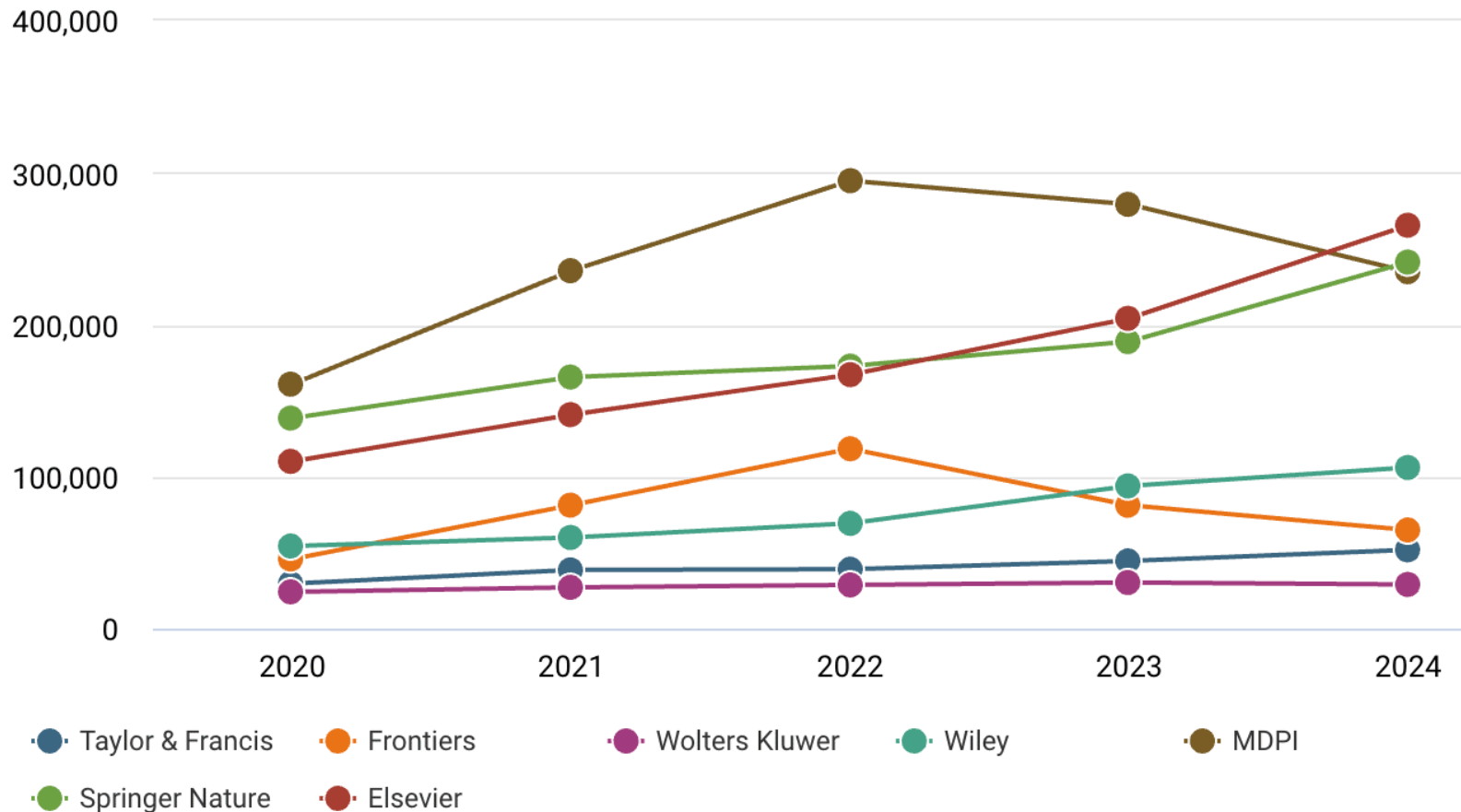
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Source **The Brief**
Issue 68: Retrenchment <https://www.ce-strategy.com/the-brief/retrenchment/>



The scholarly publishing landscape

Total open access article output of select publishers



“we have heard anecdotally from several publishers that their submissions are up by double digits and they attribute this entirely to the shift away from MDPI, Frontiers, and Hindawi.”

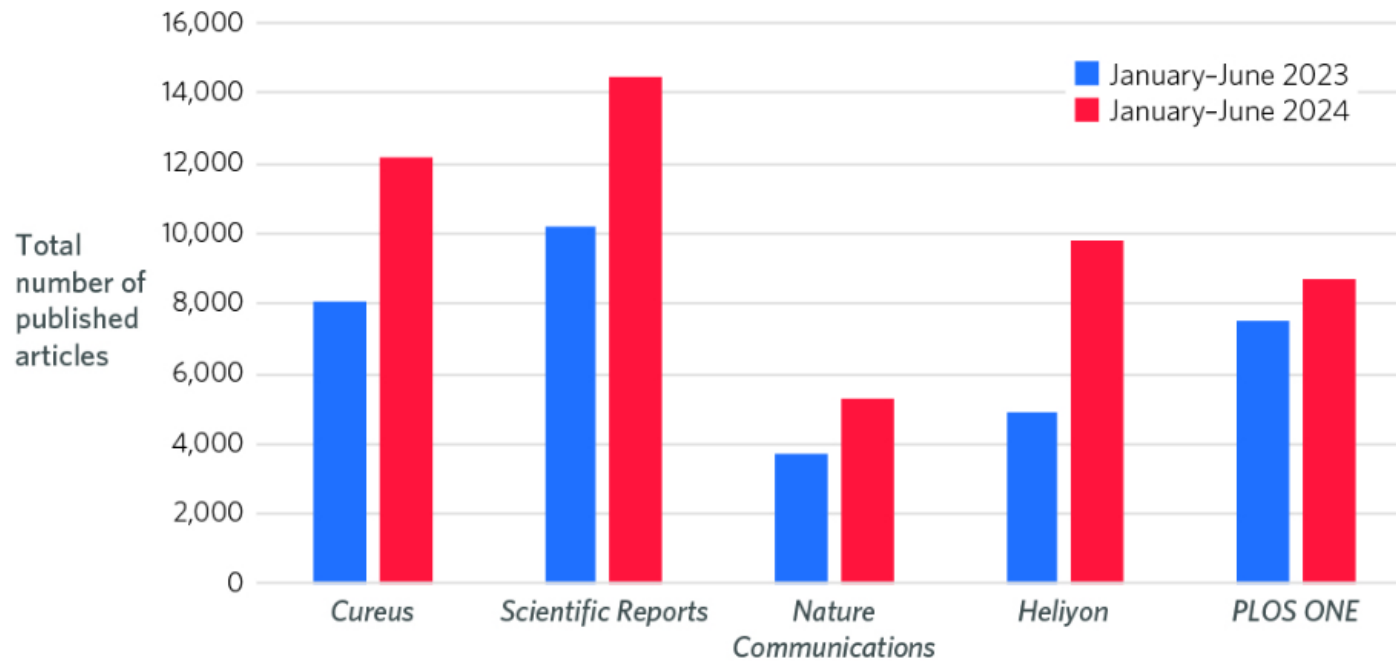
Source **Journalology #109**
Research and review articles published OA in fully OA or hybrid journals <https://ck.journalology.com/posts/journalology-109-in-decline>



The scholarly publishing landscape

Growth drivers of open access publishing: megajournals

Total published article volumes for selected megajournals, 2023 versus 2024



Results filtered to eliminate non-journal article content, such as conference abstracts, retraction notices, and front/back matter.

Source: Dimensions (www.dimensions.ai).

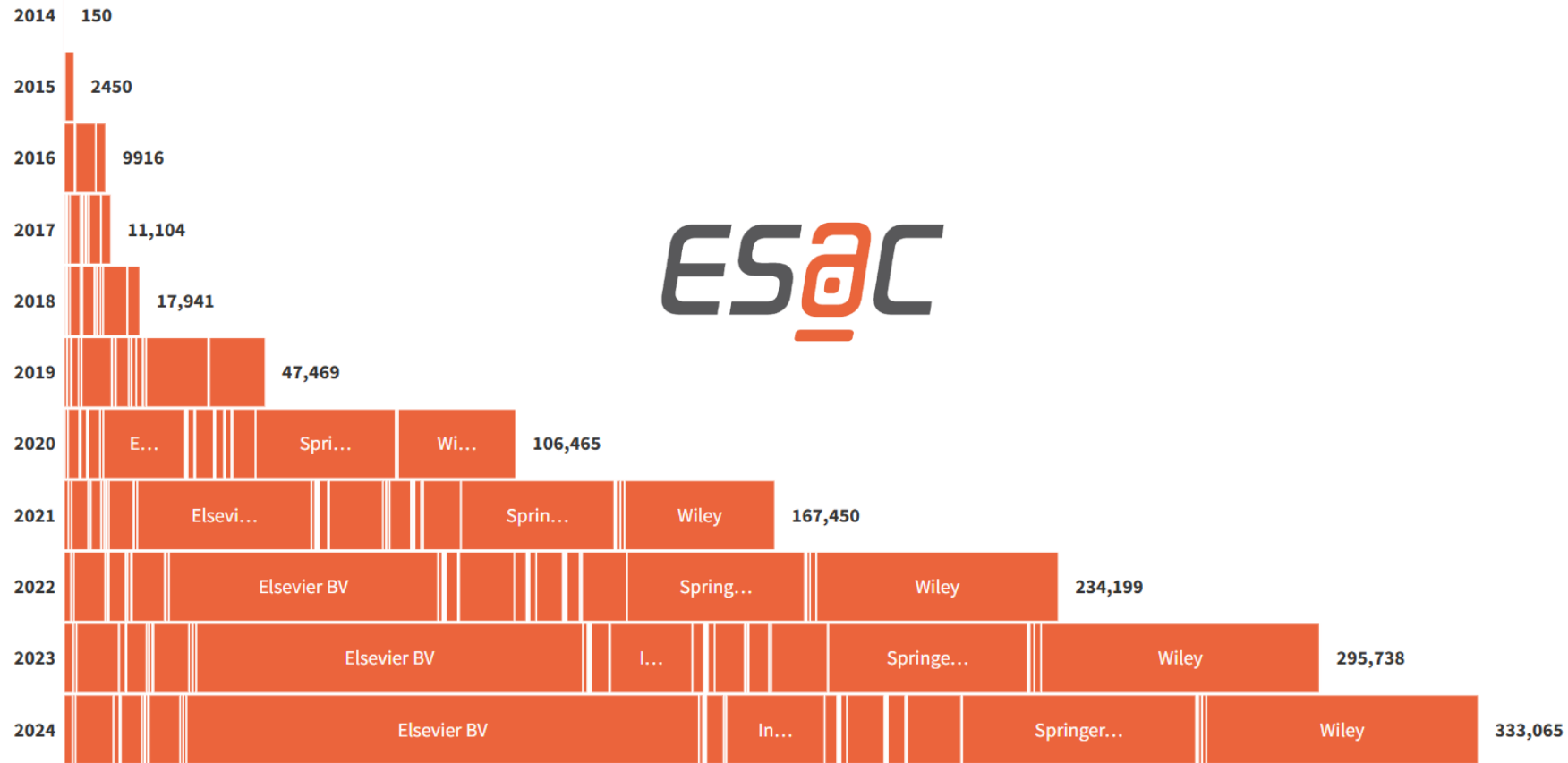
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Source **The Brief**

Issue 68: Retrenchment <https://www.ce-strategy.com/the-brief/retrenchment/>

The scholarly publishing landscape

Growth drivers of open access publishing: TAs

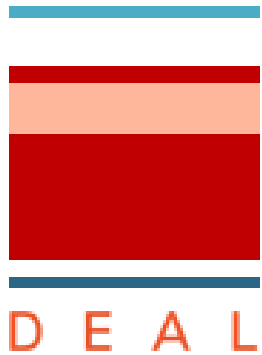


Source **ESAC Market Watch**

Transformative agreements over time, by publisher <https://esac-initiative.org/market-watch/>

Key publisher insights

Wiley agreement benchmarks



- **Price transparency enables comparisons and competition**
 - PAR fee in first Wiley agreement: Euro 2750
 - Tiered pricing of PAR fees in second Wiley agreement: Euro 3150 to 2200 with an expected average per-article cost to be Euro 2610
- Move from pre-payment of subscriptions (lump sums) to post-payment based on actual article output: PAR fee that rolls up costs of OA publishing and reading >> **funding follow authors wherever they choose to publish**
- Integration of data privacy clauses in all agreements



SCHEDULE 2: MEMORANDUM REGARDING NON-COMMERCIAL, NON-LICENSE TOPICS

In an effort toward transforming the system of scholarly communication more broadly, Wiley, UC and SCELC included in their negotiations several issues of importance to a broad range of stakeholders. Part of the motivation for UC and SCELC to enter into a commercial transformative agreement with Wiley was because Wiley made a commitment to address these non-commercial issues over the short- and longer-term. This memorandum codifies the substance of our discussions, documents publicly the commitments made by Wiley, and will guide ongoing and future actions.

Sources

DEAL Konsortium Wiley agreement <https://deal-konsortium.de/en/agreements/wiley>

California Digital Library Wiley UC transformative agreement <https://ucsf.app.box.com/s/in1d6ry2vc2tryyypb7yz3ofg90zhy6q>



Key publisher insights

Wiley negotiations failed in Norway

No agreement between Wiley and Sikt on a new publish and read agreement from 2025

Unfortunately, it has not been possible to reach an understanding with Wiley on a new publish and read agreement. Sikt and Sikt's negotiation council have therefore decided not to continue the agreement from 2025.

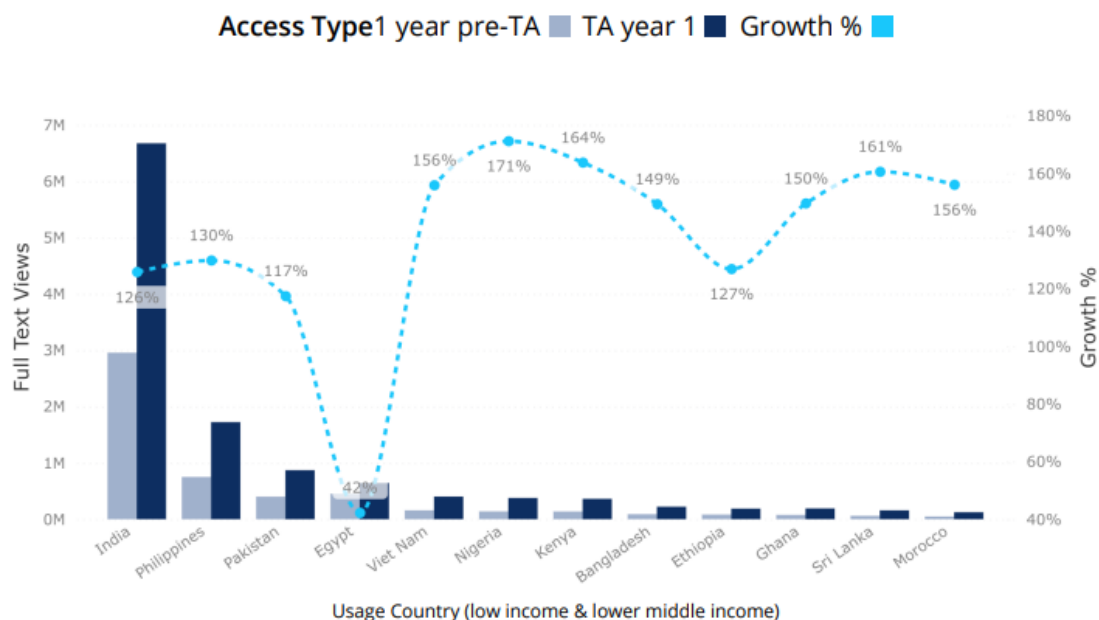
“ The negotiation process has been ongoing since spring 2024. Sikt has received several offers from Wiley, the latest just before the turn of the year. The offer included a price increase for a publish and read agreement from 2025, despite the demand for a price reduction. The publisher has recently announced that this offer is final, and the offer is not accepted by Sikt and Sikt's negotiation council.

On behalf of the participating institutions, Sikt has negotiated with price reduction as the most important requirement. The agreement has been highly priced compared to similar agreements from several other publishers. Therefore, it was prioritized to bring the price down to the level of other agreements. Price reduction is especially important at a time when institutions have strained finances.

Key publisher insights

Wiley on equity

TA-affiliated article full text views by top 12 low income & lower middle income countries



Source Wiley

Are transformational agreements really having an impact? <https://www.wiley.com/en-us/network/publishing/research-publishing/open-access/are-transformational-agreements-really-making-an-impact>

Pilot pricing framework <https://newsroom.wiley.com/press-releases/press-release-details/2025/Wiley-launches-pilot-pricing-framework-to-support-equitable-OA-publishing-for-researchers-in-Latin-America/default.aspx>

Wiley launches pilot pricing framework to support equitable OA publishing for researchers in Latin America

02/10/2025

Pilot aims to inform a more equitable approach to pricing, based on World Bank economic data

Hoboken NJ – February 10, 2025 – Wiley, one of the world’s largest publishers and a trusted leader in research and learning, today announced a pilot pricing program to provide discounts for research authors based in Latin America, reinforcing its commitment to deliver equitable publishing options for scholars across the globe.

The pilot program, which began on January 21, 2025, supports authors across 33 countries in Latin America, including in Mexico, South America, and the Caribbean, to publish research in Wiley’s portfolio of nearly 600 gold open access journals. Discounts on [Article Publication Charges \(APCs\)](#) are applied in direct relationship to the Purchasing Power Index (PPI) value of each participating country, informed by data from the World Bank [International Comparison Program](#). The anticipated timeline for the pilot is 12 months, with a mid-term review to inform future actions.



Key publisher insights

Wiley bets on high-profile journals and AI

“ Our multidisciplinary Journal Advanced Science is delivering exceptional growth this year, while our newest titles Advanced Intelligent Discovery and Advanced Robotics Research recently published their inaugural articles. We anticipate launching additional advanced journals in 2025 and 2026. And as a reminder, top-tier journal franchises like Advanced are differentiators for large publishers.

Source **Wiley**

Earning's call March 2025 transcript https://s27.q4cdn.com/812717746/files/doc_financials/2025/q3/Q325-Earnings-Transcript.pdf

Key publisher insights

Wiley bets on high-profile journals and AI

“ Let's now turn to AI growth, particularly the long-term corporate opportunity I mentioned earlier. This quarter, we executed an expanded agreement for AI model training purposes and we're seeing promising developments in the broader vertical-specific market. The agreement builds on the project announced in Q1, involving backlisted learning content for training large language models. This Q3 expansion incorporates backlist research content defined as previously published material older than 3 years. The \$9 million agreement brings our total AI revenue this year to \$30 million, following \$23 million realized last year. As a reminder, these Phase 1 trading agreements are nonrecurring.

It's important to reemphasize that licensing represents a core business activity for Wiley. As we take on new AI-specific initiatives, our guiding principles remain straightforward. We recognize our responsibility to engage with AI developers to secure scientific accuracy and deliver optimal learning outcomes. These models require training on trusted authoritative content such as Wiley's while protecting the rights of authors and other copyright holders, a fundamental responsibility we embrace as a knowledge company.

Key publisher insights

Taylor & Francis market insights

Academic Markets (Taylor & Francis)

Taylor & Francis had a strong year in 2024, with underlying revenues on plan at c.3.5% (excluding non-recurring data access contracts) and an exceptional performance in licencing, archives and data access, in particular with AI companies, taking total revenue growth to 12.8%. As previously disclosed, this included \$75m+ of data access revenue which is non-recurring.

In 2025, the year has started well, with subscription renewals ahead on both retention and cash collection compared to 2024. Open research volumes also continue to grow, with the focus on increasing submissions, improving acceptance rates and shortening the lead time from submission to publication.

In Advanced Learning, we are also increasing frontlist volumes to close to 9,000 titles, which will further expand the back list of c.200,000 specialist titles.

Given the size, scale and depth of specialist content assets within the **Taylor & Francis** portfolio, we are targeting further licencing and archive revenues as part of an ongoing, repeatable income stream with a range of customers, including institutions, national libraries and AI companies.

The target in 2025 is 4% underlying revenue growth (rebasng 2024 performance for non-recurring data access contracts).

Source **Informa PLC**

2024 Preliminary Full-Year Results <https://www.informa.com/globalassets/documents/investor-relations/2025/informa-2024-full-year-results.pdf>

Key publisher insights

Taylor & Francis initiative

Taylor & Francis news

12th November 2024

Taylor & Francis Announces Open Access Collective Funding Pilot



Photo by Ava Coploff on Unsplash

Collective Pathway to Open Publishing will support authors to publish OA using a combination of funding sources

Source **Taylor & Francis**

<https://newsroom.taylorandfrancisgroup.com/collective-pathway-to-open-publishing/>

“ A new Taylor & Francis pilot aims to support open access (OA) publishing using a combination of existing funding sources, enabling authors of every article type to choose OA at no cost.

Collective Pathway to Open Publishing [↗](#) (CPOP) has been designed as an OA solution for Humanities and Social Sciences (HSS) journals, especially those focused on regions with a high uptake of OA agreements.

Collective funding

CPOP builds on the success of Taylor & Francis' OA (Read & Publish) agreements, which now help researchers at over 1,000 institutions to publish OA. Some HSS journals with author communities in regions where agreements are common now publish most of their articles OA. However, meeting the criteria for conversion to a full OA journal under an Article Publishing Charge (APC) model remains a challenge due to limited OA funding in HSS fields for articles not covered by an agreement.

CPOP aims to solve this challenge by combining funding from OA agreements with 'read' income from subscriptions and other reading access fees. Through CPOP these funding sources can be used collectively to support the journal's conversion to OA, one volume at a time, without any APCs.

Evolving priorities in publisher negotiations

B17 final statement

Renewed priorities of our community

1 Academy control

“We reject any claim to exclusive rights over research articles and related outputs (data, code, preprint, peer review reports, etc.)”

2 Academic use of computational research methods

“Application of a CC BY license ensures that scholarly literature and associated outputs contribute to a globally accessible and robust corpus of knowledge for computational research, allowing the academy to fully harness this potential(...)”

3 Transparency

“We call on publishers to collaborate with the research community to enable the full opening of research information, as described in the Barcelona Declaration.”

4 Fair investment realignment

“As institutions shift their financial commitments from subscriptions to open access, publishers must adapt their pricing structures accordingly (...) reducing historical revenue levels to achieve a fairer distribution of publishing costs. (...) Institutions with high research output must have the confidence that their investments reflect the true cost of responsible open access publishing.”



Source **OA2020 Initiative**

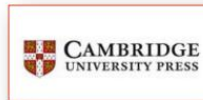
B17 Final Statement <https://oa2020.org/b17-conference/final-statement/>

Negotiations shaping OA publishing Developments in author rights

Since B16, libraries are actively working with publishers to ensure License to Publish agreements of restrictive CC BY licenses preserve author rights, as originally intended

Before B16

The structure and language of License to Publish agreements often confuse and mislead authors: *authors do not realize they are giving away rights*



1

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Source **OA2020 Initiative**

Rich Schneider's presentation at B17 <https://oa2020.org/b17-conference/agenda/>



Negotiations shaping OA publishing

Developments in author rights

Since B16, libraries are actively working with publishers to ensure License to Publish agreements of restrictive CC BY licenses preserve author rights, as originally intended

Before B16

The structure and language of License to Publish agreements often confuse and mislead authors: *authors do not realize they are giving away rights*



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Source **OA2020 Initiative**

Rich Schneider's presentation at B17 <https://oa2020.org/b17-conference/agenda/>



Negotiations shaping OA publishing

Developments in author rights

But there is still work to be done!

Action items from authors for moving forward

- Institutions and publishers should prioritize and support the retention of copyright and all rights therein by authors.
- License to Publish (LTP) agreements should only restrict what end-users may do under the license and not what the licensor (rights holder) can do.
- Transformative open access agreements should stipulate that authors only grant “limited” or “non-exclusive” licenses to publishers.
- Liberal Creative Commons (CC) licenses (e.g., CC BY) should be applied as the default choice in transformative agreements, but if authors choose licenses that restrict commercial and/or derivative uses of the work (e.g., CC BY-NC, CC BY-ND, CC BY-NC-ND) then those licenses should function as originally intended with authors always free to do whatever they want with their own work.
- LTP agreements should be simple with “human-readable” language, publisher workflows should support CC BY as default, and downstream implications of restrictive CC licenses should be made clear to authors.

Source **OA2020 Initiative**

Rich Schneider's presentation at B17 <https://oa2020.org/b17-conference/agenda/>

Negotiations shaping OA publishing CC BY to harness the power of AI



• January 07, 2025

AI and the Struggle for Control Over Research

For those feeling queasy about academic publishers' AI deals, Günter Waibel and Dave Hansen argue the way forward is not more restrictive licenses—it's open access.

By [Günter Waibel](#) and [Dave Hansen](#)

“ Paywalls Are Not the Answer

If unnerved authors retreat behind the perceived safety of a publisher's paywall, the reality is that doing so will not prevent use of their works for AI purposes. On the contrary, in signing over their copyright, authors give the same commercial publishers that already exploit academic work a monopoly over their scholarship—and as distasteful as it is, that makes the publisher's exercise of exclusive control difficult to challenge.

The answer is not a paywall or more restrictive license. The answer is open access.

Sources

Inside Higher Ed <https://www.insidehighered.com/opinion/views/2025/01/07/ai-deals-underscore-importance-open-access-opinion>

ICOLC <https://icolc.net/statements/icolc-statement-ai-licensing>



To that end, ICOLC endorses and upholds the following principles with regard to AI clauses in licenses negotiated and signed by library consortia:

- AI clauses will permit the use of AI for any and all legal purposes that support consortia members' core missions of non commercial research, teaching, learning, and equitable access to information.
- Multi-year licenses that include AI clauses will formally establish opportunities for the revision and/or updating of language related to AI during the term of the agreement to reflect legal or technological developments.
- AI clauses will not restrict user actions in ways that are fundamentally unenforceable.
- AI clauses will in no way prevent authorized users from making licensed content fully accessible to other authorized users in any legal manner.
- AI clauses will not be introduced into a negotiation in a way that limits a consortium's opportunity to fully review the clauses in accordance with the consortium's regular review procedure.
- AI clauses will not introduce new liability clauses beyond the scope of what has previously been agreed upon, especially for actions of authorized users.





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Thank you!

Colleen Campbell

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B16 final statement

Key community demands in 2023



- The global open access transition must advance at a far greater pace
- Inequity is incompatible with scholarly publishing
- Academic self-governance is an imperative in scholarly publishing
- Author choice and author rights must be fully enabled