

The Changing Landscape of Open Access Policies and Transformative Agreements

Tom Ciavarella and Eleonora Colangelo

Introduction

The Open Access (OA) movement is at a critical juncture, with stakeholders worldwide seeking innovative models to achieve equitable, sustainable, and transparent scholarly publishing. Transformative agreements (TAs)—defined in key studies as transitional contracts aimed at shifting subscription-based journals toward full OA—have become central to this effort. Although praised for accelerating OA adoption, TAs have also sparked ongoing debates about their long-term impact, financial implications, and effectiveness. The October 2023 CSE webinar, “The Changing Landscape of Open Access Policies and Transformative Agreements,” organized by Eleonora Colangelo and moderated by Tom Ciavarella, provided an in-depth exploration of these issues, offering insights into the evolving role of TAs within the broader OA landscape.

The discussion highlighted several key developments and challenges anticipated for 2024 and 2025. Three prominent voices guided the discussion, each addressing different facets of the OA state of affairs.

Gates Foundation Approach to Open Access

Ashley Farley, Senior Officer of Knowledge and Research Services, the Bill and Melinda Gates Foundation (BMGF), presented a thorough review of the BMGF’s OA policy, from its inception to anticipated developments in 2025.¹ She detailed both milestones and ongoing challenges based on the BMGF’s OA report,² emphasizing the foundation’s

support for rights retention and the Green OA route, and advocacy for emerging models.

As recalled by Farley, funder collaboration has been a cornerstone of BMGF’s OA strategy. The foundation joined cOAlition S³ as a founding member in 2017. By 2021, it aligned its policy with the Plan S principles, including a reduction in funding for hybrid journal models. To promote transparency and fairness in OA costs, the BMGF has also participated in cOAlition S’s Journal Comparison Service.⁴

Addressing the financial and ethical aspects of OA, Farley identified equitable OA publishing as an ongoing challenge. Escalating article processing charge (APC) costs remain a concern: Despite BMGF’s strong publication output and OA compliance rates, Farley noted a decline in articles requiring payments from the Central Fund partly because of grantees’ increased use of institutional TAs and alternative OA routes, even as annual publishing costs continue to rise (Figure 1).

Looking ahead, Farley outlined BMGF’s commitment to leveraging its decade of OA experience to deepen understanding of the movement’s impact. Central to BMGF’s effort has been the creation of Gates Open Research,⁵ a platform founded on the publish–review–curate model, which—alongside other coordinated initiatives and alignment with the Office of Science and Technology Policy’s mandate—has helped establish OA as an industry standard. This forms the basis on which BMGF is building its future strategy: With rising compliance rates driven by institutional mandates, the foundation is now exploring diverse OA models—such as preprints and infrastructure support—to reduce reliance on per-article payments, thus making the research ecosystem more APC-resilient.

Societies and OA

Rob Johnson also addressed economic anxiety, providing an up-to-date perspective on the relationship between learned societies and OA in the context of TAs.

Many learned societies have historically viewed OA with skepticism: Readers may still recall headlines warning of OA as a potential threat, with some even describing it as a “catastrophe.”^{6,7} While learned societies are now

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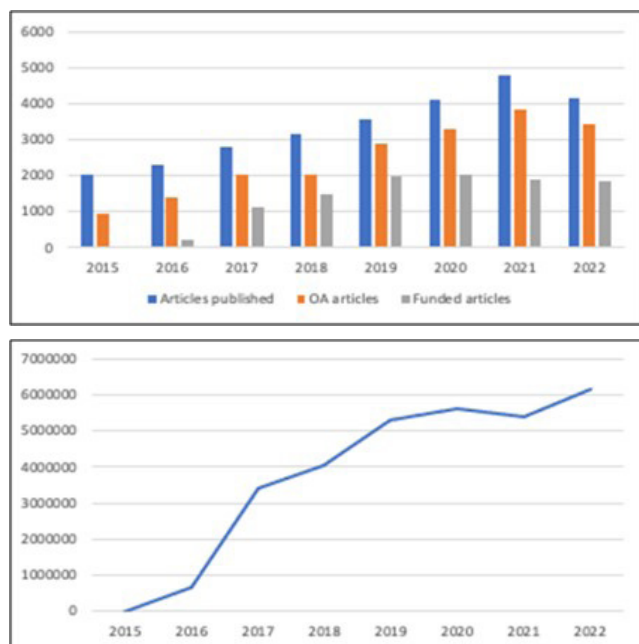


Figure 1. Top The Bill and Melinda Gates Foundation (BMGF) total publishing vs. Open Access. Bottom The BMGF Central Fund payments, 2015–2022.

increasingly embracing OA, adapting their established practices and business models to this evolving landscape presents significant operational and financial challenges.

The numbers speak for themselves. A study by Research Consulting highlighted a shift in the publishing habits of learned societies in the UK, with 68 societies self-publishing journals in 2015, a number that dropped to 44 by 2023.^{8,9} As Johnson explained, many societies find self-publishing too complex and costly, leading them to partner with major publishers or cease publishing altogether, a trend that, although initially observed in the UK (Figure 2), is reflected globally, with notable shifts occurring across the entire industry.

Johnson also considered revenue trends for a sample of the top UK learned societies involved in journal publishing. At first glance, the findings might not seem too alarming (i.e., some larger societies have experienced notable revenue growth, whereas others have seen modest declines). However, a closer look reveals a different story. When presented as a percentage change from 2015, it becomes evident that larger, well-established societies have seen growth, while small- and medium-sized societies have faced substantial revenue losses. In some cases, these societies have seen their publishing revenue drop by up to 100% over the past 8 years (Figure 3).

Similarly, comparing societies that self-publish with those that partner with external publishers shows a marked divide. Large, self-publishing societies have continued to grow

their revenue, while those that outsource publishing have seen significant declines. This trend highlights a broader challenge in the OA landscape, where many societies, once reliant on subscription revenues to support their activities, are now witnessing these income streams shrink as OA models expand. For many smaller societies, negotiating TAs with institutions and consortia is particularly difficult, leading them to partner with larger publishers.

At this point, the outlook might seem bleak, but Johnson highlighted 3 key reasons for optimism. First, the growing focus on research integrity offers societies the chance to emphasize quality over quantity, maintain rigorous peer review, and position themselves in a future where quality is prioritized.¹⁰ Second, there is increasing support for not-for-profit publishing models, with the Council of the European Union promoting community-driven publishing—an initiative that aligns with the broader mission of learned societies.¹¹ Finally, technological advancements, including artificial intelligence-driven editorial processes and data analytics, provide societies with opportunities to streamline operations, reduce costs, and improve efficiency. By leaning into these core strengths (i.e., research integrity and community-driven publishing), societies may not just survive, but thrive, making their outlook brighter than expected.

OA in the Middle East and North Africa

Shifting focus, Kamran Kardan explored the true meaning of embracing OA in the Middle East and North Africa (MENA) region, starting with a telling survey conducted in 2021 during Open Access Week. The survey, which involved nearly 800 participants, revealed significant gaps in understanding—only 19.5% of respondents fully understood OA, whereas 26% mistakenly associated it with predatory publishing. Since first exploring OA for his master's dissertation, Kardan has recognized key issues that continue to influence the region's understanding of the movement (i.e., concerns over copyright, confusion about OA tiers, misconceptions regarding peer review in OA journals, and resistance to APCs).

Diving deeper, Kardan outlined 3 main levels of regional challenges:

- **Researchers** face mistrust and fear of predatory publishers, lack of incentives or mandates, and difficulties in publishing OA research in Arabic.
- **Institutions** struggle with communicating APC workflows to authors, dealing with a variety of publisher business models, and lack of national policies.
- **Libraries** face cost-sharing issues across multiple entities and platforms that often fail to support Arabic script.¹²

Despite the hurdles, Kardan stressed how they have driven more extensive initiatives in the region.¹³ Since

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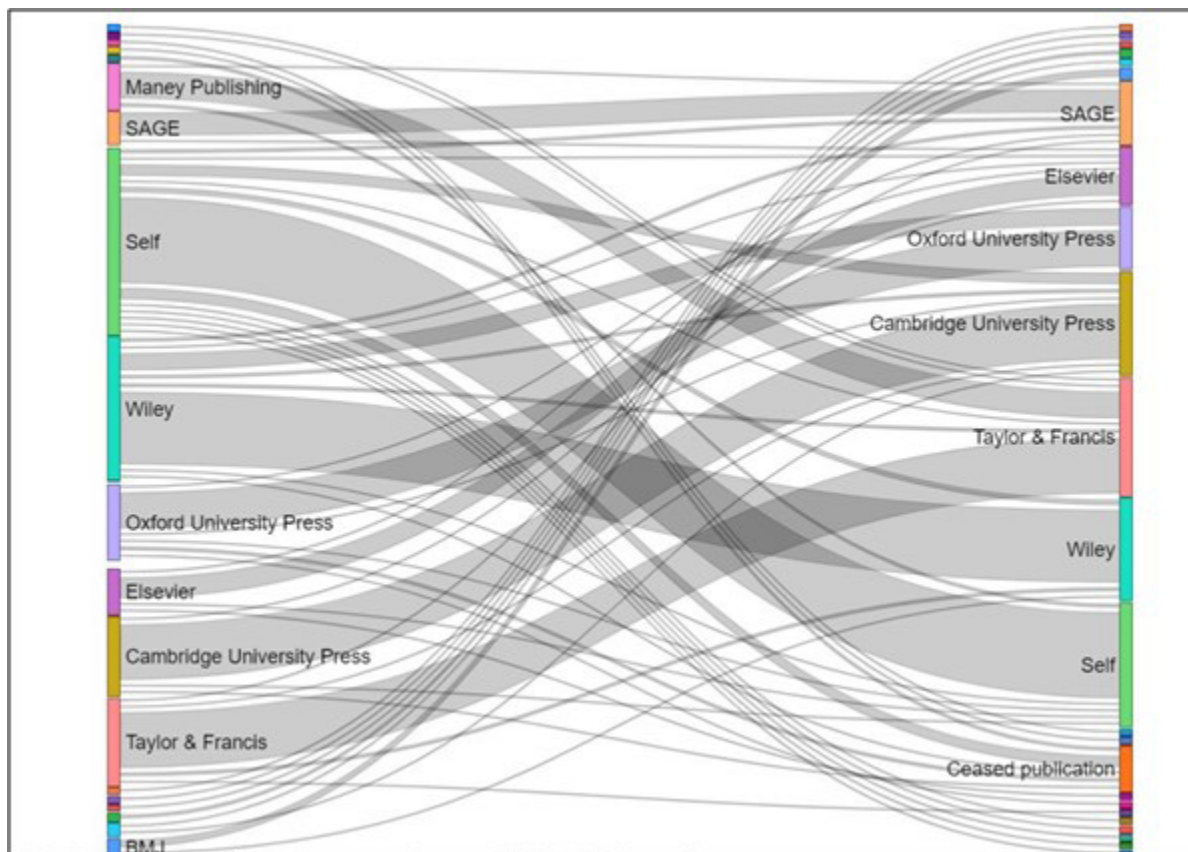


Figure 2. 2015 publishing partner vs. 2023 publishing partner for UK learned societies.

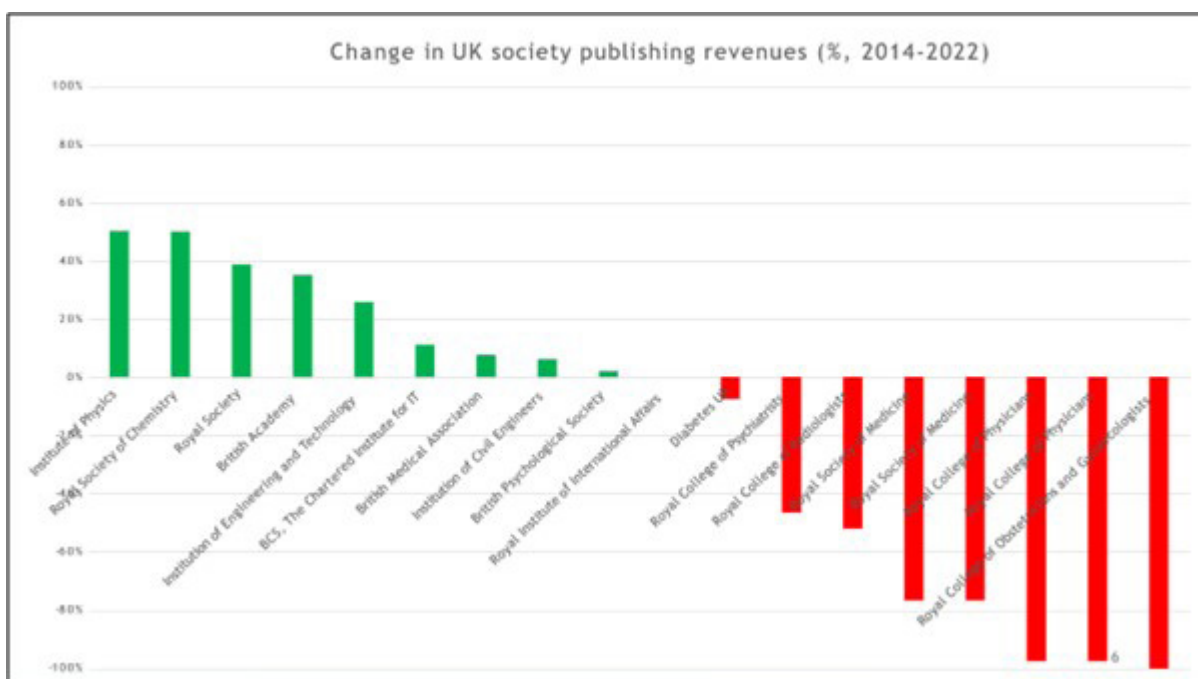


Figure 3. Percentage change in UK society publishing revenues, 2014–2022.

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2016, the Egyptian Knowledge Bank has provided citizens with access to major publishers' resources,¹⁴ in parallel with the QScience/Bloomsbury partnership initiated in Qatar.¹⁵ Also, KAUST OA initiatives in Saudi Arabia led to the establishment of the Saudi Digital Library, supporting read-and-publish agreements since 2018.¹⁶

Furthermore, Kardan discussed how these very setbacks have shaped Knowledge E's role in supporting the OA movement in MENA. Through the Knowledge E Foundation, their Philanthropic arm, they founded the Forum for Open Research in MENA to address the demand for education and policy development.¹⁷ Since then, they have hosted regional events in Egypt (2022), Abu Dhabi (2023, in partnership with UNESCO), and Doha, Qatar (2024), and monthly online community development activities. One of their key initiatives is an OA glossary in Arabic, designed to standardize OA terminology and clarify misunderstandings (e.g., "open access" as an equivalent of "free").¹⁸ Knowledge E has also supported the translation of "Think. Check. Submit." into Arabic and launched "Think. Check. Attend."^{19,20} to raise awareness about predatory conferences, with these resources also being translated into other regional languages to support MENA researchers.

As outlined in the last part of his talk, Kardan has long been interested in the costs of OA publishing, making affordability a critical concern. To address this, Knowledge E launched Zesty,²¹ a platform offering free access to OA content (supporting discoverability and accessibility) and affordable access to paywall content, which now boasts close to a million global users, acting as a sort of Netflix for scholarly literature. Zesty is just one of many initiatives demonstrating that significant developments are underway in the region—as confirmed, just 1 year after the webinar, with a notable milestone at King Fahd University National Library, where OA is now applied to both scholarly publications and Saudi Arabian heritage.²²

Updates and Key Takeaways

Closing this report are some key takeaways—much needed, given the 1-year gap since the webinar.

TAs have rapidly evolved as key tools in the shift toward OA, with significant developments since they started being introduced in 2019.²³ In just 5 years, TAs have become increasingly diversified, now encompassing a diverse array of contract types.²⁴ Their costs and value—particularly in light of the Coalition S decision to cease financial support by the end of 2024—remain topics of ongoing discussion.²⁵ However, if the numbers are anything to go by, the momentum behind TAs is undeniable. The ESAC Transformative Agreement Registry recently celebrated a major milestone, surpassing 1,000 agreements, with over 100 new entries added in just the first months of 2024 alone.²⁶ This surge, confirmed by

the STM OA Dashboard,²⁷ reflects a growing commitment within the scholarly community to embrace TAs as a viable path to expand OA, signaling a future where OA could soon become the norm rather than the exception. Ultimately, TAs can serve as enablers of broader missions, such as those aimed at strengthening research integrity.²⁸

Despite these promising trends, a key lesson from the webinar is clear: OA policies alone are not a silver bullet for the challenges facing the research community. Compliance with OA mandates has steadily increased, but it appears to have plateaued in recent years, suggesting that policy shifts need to be coupled with practical, systemic change. Furthermore, the adoption of alternative publishing models—such as the publish-review-curate model—remains sluggish, and open data availability continues to lag behind article compliance rates.

Although the BMGF has made significant strides in reducing APCs, the growing volume of publications has led to rising costs across the board. This reflects a broader pattern observed among learned societies, many of which are struggling to balance the financial pressures of OA with the need to maintain quality and sustainability in their operations.

Yet, there is cause for optimism. The growing emphasis on research integrity, along with a shared commitment to quality over quantity, is gaining traction as a beacon of hope for a more equitable and transparent publishing ecosystem. Likewise, collaboration will be key in moving forward. Funders, publishers, and organizations must work together to address the inherent challenges of TAs, including their costs and the need for fairer pricing models. As the BMGF and other key players continue to push for innovative approaches, it is clear that partnerships will play a pivotal role in advancing OA.

Regional variables must be considered too. While the MENA region has experienced slower adoption compared with the United States and Europe, significant progress is being made. The diverse challenges facing this region—mistrust of OA, a lack of infrastructure, and language barriers—highlight the need for country-specific strategies. By tailoring OA models to fit regional contexts, MENA countries can begin to unlock the full potential of OA.

And here, at last, is *equity*—at the heart of all these discussions and set to remain a central focus seen in CSE's 2024 Fall Virtual Symposium.²⁹ As the debate over the fairness of TAs and read-and-publish deals intensifies, achieving equitable access to scholarly content will demand ongoing dialogue, innovation, and global collaboration. As a result, TAs are likely to be impacted, especially now that a new equitable pricing framework has been announced.³⁰

Looking ahead to 2025, we can expect continued focus on policy development, partnership models, and cost-sharing strategies.

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