



Transformative Agreements Benchmarking Report

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Executive Summary

This report examines the transition from traditional subscription-based models (Big Deal subscriptions) to transformative open access agreements across seven countries in Europe, Latin America, and North America. The countries included in the analysis are Germany, Sweden, the United Kingdom, Brazil, Colombia, Mexico, and the United States. These transitions reflect a broader global shift towards open access to research, driven by national policies and mandates aimed at increasing access to scholarly outputs while also supporting the sustainability of the publishing ecosystem.

A common factor across all these countries is the influence of national open access policies and mandates, which have catalysed efforts to incorporate Article Processing Charges (APCs) into the overall research access model. These policies have created pathways for institutions to move away from expensive subscription fees toward models that allow for broader and more equitable access to scholarly publications.

The report also identifies a new and emerging model in the open access landscape—Pure Publish. This model builds on the Read and Publish approach common to many transformative agreements but takes it a step further by eliminating subscription fees altogether and moving towards fully open access. Although this model is still in development, it represents a new direction for scholarly publishing, and its impact will need to be closely monitored as negotiations progress and agreements become publicly available.

It is important to note that the agreements mentioned in this report serve as examples of the broader trends and transitions underway, but they are not exhaustive. The intention is to highlight key instances of progress and innovation, not to present a comprehensive list of all transformative agreements globally. Future research will be required to track the continued evolution of these models and the impact they have on both access to research and the financial sustainability of publishers.

As these transformations unfold, stakeholders must remain vigilant to the evolving landscape, particularly regarding the Pure Publish model, and consider how these changes might influence future agreements and publishing strategies.

Shift to Pure Publish

The shift to a pure publish model is part of a long-term vision for creating a more sustainable, equitable, and accessible scholarly publishing system. By eliminating financial barriers to access, this approach will allow both researchers and the general public to freely access the latest scientific discoveries. This is especially important in fields where timely access to knowledge can directly impact public health, environmental policy, and other areas critical to societal well-being.

Starting in 2024, the focus will shift to the “pure publish” model, which represents a major departure from the read-and-publish model. Under this new system, publishers will only be compensated for the publishing services they provide, rather than being paid for both access and publication. This will eliminate the financial burden on institutions and authors related to access costs, ensuring that all scholarly research is freely available to everyone without paywalls.

Currently, the read-and-publish model, featured in many transformative agreements, is a hybrid system where universities and research institutions pay for both access to journal content (the “read” part) and the ability to publish research open access (the “publish” part). While this model has helped improve access to scholarly work, there are some initiatives that are now preparing to take the next step toward full open access.

Key Features of the “Pure Publish” Model

- 1. Transparency in Pricing:** One of the major criticisms of the read-and-publish model has been the lack of transparency in pricing, with some institutions facing escalating costs tied to subscription fees. The “pure publish” model will introduce clearer, more predictable pricing. Instead of paying publishers for both subscriptions and publishing fees, universities will pay for publishing services alone. This system will allow for more transparent financial transactions and give institutions a better understanding of the actual costs of open access publishing.
- 2. Cost-Effectiveness:** By eliminating the subscription element, the “pure publish” model aims to be more cost-effective for institutions, as they will no longer need to pay for journal access on top of article processing charges (APCs). This streamlined approach to funding will reduce overall costs for universities and research institutions, while increasing the efficiency of the publishing process. Additionally, because it is based on a collective agreement, it is expected to lower the per-article cost of publishing, making open access more financially viable for all.
- 3. Reduction in Transaction Costs:** The read-and-publish system is often criticized for its complexity, as it involves separate financial transactions for subscriptions, publishing, and sometimes additional fees like APCs. The “pure publish” model simplifies this structure by eliminating the need for multiple payments. Authors will no longer need to worry about article processing charges being levied separately by individual journals, and institutions will no longer need to negotiate a variety of

contract terms with publishers. This reduction in transaction costs should result in a more streamlined and efficient process for everyone involved.

4. **Separation of Financial Transactions:** Under the current read-and-publish model, financial transactions can create potential conflicts of interest. For example, concerns have been raised about the possibility that publishers might have an incentive to prioritize volume over quality, particularly when payments are tied to article publication. In the "pure publish" system, however, the financial transactions will no longer occur between the author and the publisher for each individual article. This means that there will be fewer incentives for publishers to compromise on quality control in order to increase revenue from article processing charges. The publishing process will become more focused on scholarly rigor and editorial quality.

Germany

Germany Open Access Policies

Germany has been a leader in promoting open access (OA) and open science policies in Europe, with several national initiatives and strategic moves to ensure that publicly funded research is freely accessible. The journey toward open access in Germany began in earnest in the early 2000s, but it was in 2010 that the country made its first major policy commitment to open access with the release of the Berlin Declaration on Open Access to Knowledge in the Sciences and Humanities¹. This declaration, developed by a group of European institutions and signed by Germany's Max Planck Society, Humboldt University, and other leading research organizations, called for the free dissemination of academic research results through open access repositories. The Berlin Declaration set the stage for further national policy actions and became one of the most influential documents in the global OA movement.

In 2014, Germany took another significant step with the adoption of the German National Strategy for Open Access². This strategy, initiated by the Federal Ministry of Education and Research (BMBF), aimed to provide a clear and comprehensive framework for promoting open access in Germany. The strategy set out concrete goals, including the requirement that publicly funded research be made available through open access channels and repositories. It also sought to encourage the development of sustainable funding models for OA publishing and incentivize the adoption of OA practices among researchers and institutions. This policy was part of Germany's broader efforts to integrate open science principles into the national research landscape and was followed by funding schemes to support infrastructure development for open access repositories and the implementation of OA practices at universities and research institutes.

A more recent development came in 2020 when Germany introduced the "Open Access 2020" initiative³, which is a national push to transition all publicly funded scientific literature to open access by 2025. The initiative aims to move away from subscription-based models and instead fund OA publishing directly. This was done in conjunction with the Alliance of German Science Organizations, which committed to achieving 100% open access by 2025.

A key element of this initiative was Germany's involvement in the international "Plan S" movement, which calls for all research publications to be made open access. This transition is supported by a series of transformative agreements with major publishers, aiming to create pathway where publicly funded research is freely accessible to all. The Open Access 2020 initiative and its related policies reflect Germany's commitment to ensuring that scientific

¹ <https://openaccess.mpg.de/Berlin-Declaration>

² https://www.bmbf.de/SharedDocs/Publikationen/de/bmbf/FS/772970_Open_Access_in_Deutschland_en.pdf?__blob=publicationFile&v=4

³ <https://oa2020.org/>

knowledge is shared without barriers, fostering greater collaboration and access to research outputs globally.

Transition to Transformative Agreements

Germany has been at the forefront of transitioning from traditional Big Deal subscription agreements to Transformative Agreements (TAs), which support the shift toward open access (OA) publishing. These agreements, often referred to as "read-and-publish" agreements, allow institutions to maintain access to subscription-based journals while simultaneously enabling their researchers to publish open access articles without incurring additional costs. Here are some key consortia in Germany that have moved from Big Deal subscriptions to Transformative Agreements:

Project DEAL Transformative agreements⁴:

Elsevier: Negotiations between Project DEAL and Elsevier commenced in 2016 but were halted in July 2018 due to an inability to agree on a new model. To support Project DEAL's central negotiation mandate, approximately 200 German universities did not renew their individual contracts with Elsevier starting January 2017. Many German researchers also resigned from editorial positions in Elsevier journals to strengthen the push for open access. In 2023, a new agreement was reached between Elsevier and the DEAL Consortium, ending the boycott at least until 2028.

Wiley: On January 15, 2019, Project DEAL signed a three-year contract with Wiley, allowing researchers from over 700 German academic institutions to access Wiley journal content dating back to 1997 and publish open access in all hybrid and gold open access journals (approximately 1,500 titles). The costs are based on the number of articles published, with a per-article PAR fee set at €2,750 for hybrid journal publications. A 20% discount applies to APCs for gold open access publications.

Springer Nature: On August 22, 2019, Project DEAL signed a Memorandum of Understanding with Springer Nature, leading to a three-year contract that began on January 1, 2020. This agreement is regarded as the largest transformative open access agreement globally at its inception. With more than 13,000 scholarly articles from German institution authors published annually in Springer Nature journals, the agreement enables open access publishing in approximately 2,500 journals and provides extensive access to the publisher's journal portfolio.

Opted-in to DEAL Transformative Agreements in Germany

1. German National Library Consortium (GBV) and Elsevier: The German National Library Consortium (GBV), which represents a large number of academic and research institutions in Germany, signed a transformative agreement with Elsevier in 2020. This deal marked a significant shift from the Big Deal subscription model to a read-and-publish agreement. Under the terms of this agreement, institutions covered by the GBV consortium continue to have access to Elsevier's journals, but researchers are also able to publish their

⁴ <https://deal-konsortium.de/en/agreements>

articles open access in Elsevier's hybrid journals without incurring additional Article Processing Charges (APCs). This was part of a broader effort in Germany to transition from subscription-based models to fully open access publishing⁵.

2. The Alliance of German Science Organizations (Allianz der Deutschen

Wissenschaftsorganisationen) and Wiley: In 2019, the Alliance of German Science Organizations, which includes key entities like the Max Planck Society and the German Research Foundation (DFG), negotiated a transformative agreement with Wiley. This agreement moved German academic institutions from Big Deal subscriptions to an agreement that allows German researchers to publish open access in Wiley's hybrid journals without paying extra fees. At the same time, institutions continue to retain access to Wiley's journal collection. This deal was part of Germany's broader initiative to support the Open Access 2020 campaign and to gradually shift toward a fully open access publishing environment⁶.

3. **The Bavarian State Library Consortium (BSB) and Springer Nature:** The Bavarian State Library (BSB) consortium, which represents many academic institutions in Bavaria, entered into a transformative agreement with Springer Nature in 2020. This agreement allows researchers at BSB-member institutions to publish in Springer's hybrid journals with the fees covered by the consortium. In exchange, institutions continue to maintain access to Springer's large portfolio of journals. This shift to a read-and-publish model was part of Germany's national push toward open access and supports the goal of transitioning from traditional subscription models to open access publishing⁷.

4. **Max Planck Digital Library and Taylor and Francis:** Authors at the Max Planck institute can publish open access at no cost to themselves in Taylor & Francis and Routledge Open Select journals, as well as Taylor & Francis full open access journals. This is included in the open access agreement between the Max Planck Digital Library and Taylor & Francis as part of ZBW(Forum13+) transformative agreement⁸.

“Pure Publish” Model in Germany

The concept of a **pure publish** agreement has been evolving for some time, even though it wasn't initially recognized by that name. Several of the transformative agreements that have been referred to as "read-and-publish" (or "publish-and-read") actually incorporate elements of the pure publish model. For example, the **Wiley/DEAL agreement** includes both a read-and-publish component for hybrid journals and a pure publish component for Wiley's fully open-access journals. Similarly, the **Springer/DEAL agreement** offers a similar structure for Springer's fully open journals. In both cases, authors participating in the DEAL initiative are eligible for a 20% discount on article processing charges (APCs) for fully open-access journals.

⁵ <https://openaccess.mpg.de/deal-elsevier-agreement>

⁶ <https://www.hrk.de/presse/pressemitteilungen/pressemitteilung/meldung/deal-consortium-and-wiley-sign-new-5-year-open-access-agreement-5023/>

⁷ <https://www.springernature.com/gp/open-science/oa-agreements/germany>

⁸ <https://www.tandfonline.com/openaccess/members/forum13>

Sweden

Sweden's Open Access Policies

Sweden has been a pioneer in promoting open access (OA) policies in Europe, implementing a range of initiatives that have positioned the country at the forefront of the global open access movement. One of the earliest significant steps came in 2006 with the launch of the **Svensk Nationell Datatjänst (Swedish National Data Service, SND)**, which was developed to support the sharing of publicly funded research data. A landmark policy in 2008 furthered this by stipulating that researchers receiving public funding should deposit their published research in open access repositories. This policy laid the groundwork for what would become a robust open access framework across the country⁹.

In 2012, Sweden took another step forward with the **Swedish National Library's Open Access Strategy**, which aimed to make research results publicly available through repositories and open access journals. This strategy focused on aligning Sweden's research community with international open access developments, supporting the principles outlined in the Berlin Declaration on Open Access. The policy was designed to encourage Swedish universities and research institutes to adopt open access practices, both for publications and data. By the mid-2010s, several Swedish universities began making open access a priority, mandating OA for all research outputs, including articles, books, and datasets funded by public money. This emphasis on open access was complemented by Sweden's involvement in the European Union's Horizon 2020 program¹⁰, which reinforced the country's commitment to making publicly funded research freely accessible to the global scientific community¹¹.

Sweden's push for open access culminated in 2018 with the release of the **Swedish Open Access Strategy 2020**, which set a goal of achieving full open access for all Swedish publicly funded research by 2026. This policy is part of the broader Plan S initiative, which Sweden supported from the outset¹².

As part of this strategy, Sweden has worked on negotiating transformative agreements with major publishers to transition from traditional subscription-based models to read-and-publish models, enabling Swedish researchers to publish open access while still maintaining access to publishers' subscription-based content. In 2020, Sweden's National Library of Sweden and the Swedish Research Council (Vetenskapsrådet) further strengthened this effort by establishing funding schemes to support open access publishing and ensuring the

⁹ <https://snd.se/en>

¹⁰ https://research-and-innovation.ec.europa.eu/strategy/strategy-2020-2024/our-digital-future/open-science/open-access_en#:~:text=Horizon%202020%20was%20the%20Commission's,specific%20areas%20of%20Horizon%202020.

¹¹ <https://www.kb.se/in-english/about-us/the-national-library-strategy-for-sweden.html#:~:text=It%20establishes%20that%20the%20library,knowledge%20and%20freedom%20of%20opinon.>

¹² <https://www.hb.se/en/about-ub/current/news-archive/2024/february/new-guidelines-for-open-science-in-sweden/>

sustainability of open access journals. Through these policies and actions, Sweden continues to make significant progress toward realizing its goal of 100% open access by 2026¹³.

Transition to Transformative Agreements

Sweden has made significant strides in moving from Big Deal subscription agreements to Transformative Agreements (TAs) with major publishers as part of the country's broader strategy to transition to open access (OA). These agreements, also known as read-and-publish agreements, enable Swedish institutions to maintain access to subscription-based journals while simultaneously allowing their researchers to publish open access without paying additional Article Processing Charges (APCs).

1. The Swedish Consortium (Bibsam Consortium) and Elsevier: In 2019, the Bibsam Consortium, which represents the majority of Swedish universities and research institutions, reached a transformative agreement with Elsevier, one of the world's largest academic publishers. This deal marked a significant shift from the traditional Big Deal subscription model, where Swedish institutions paid for access to Elsevier's extensive journal portfolio, to a read-and-publish agreement. The agreement allowed researchers at Swedish institutions to publish their articles open access in Elsevier's hybrid journals without paying additional APCs, while still maintaining access to Elsevier's subscription-based journals. This deal was part of Sweden's broader push to move away from subscription-based publishing models and toward open access¹⁴.

2. The Bibsam Consortium and Springer Nature: Another major transformative agreement in Sweden was reached between the Bibsam Consortium and Springer Nature in 2020. This agreement also transitioned from a traditional Big Deal subscription model to a read-and-publish model. Under the terms of the agreement, Swedish researchers were granted the ability to publish open access in Springer's hybrid journals without incurring additional charges, while retaining access to Springer's vast collection of subscription-based journals. The agreement was part of Sweden's broader commitment to the Plan S initiative and its goal of achieving 100% open access by 2026¹⁵.

3. The Bibsam Consortium and Wiley: In 2020, the Bibsam Consortium also negotiated a transformative agreement with Wiley. Like the Elsevier and Springer deals, this agreement allowed Swedish institutions to maintain access to Wiley's subscription journals while providing their researchers with the ability to publish open access in Wiley's hybrid journals, with the costs covered by the agreement. This was part of Sweden's ongoing effort to make the transition to full open access while managing the financial sustainability of academic publishing¹⁶.

¹³ <https://www.vr.se/english/applying-for-funding/requirements-terms-and-conditions/publishing-open-access.html>

¹⁴ <https://www.elsevier.com/open-access/agreements/sweden-bibsam>

¹⁵ <https://www.springernature.com/gp/group/media/press-releases/springer-nature-and-bisbsam-consortium-agree-transformative-agr/20209930>

¹⁶ <https://authorservices.wiley.com/author-resources/Journal-Authors/open-access/affiliation-policies-payments/bibsam-agreement.html>

4. The Swedish Consortium and Taylor & Francis: In addition to the larger publishers like Elsevier, Springer, and Wiley, Sweden's Bibsam Consortium has also negotiated transformative agreements with other publishers like Taylor & Francis in 2021. These agreements enable Swedish institutions to continue accessing Taylor & Francis's portfolio of academic journals, while Swedish researchers benefit from the ability to publish open access without facing additional costs. This agreement is consistent with Sweden's open access policies and Plan S, which emphasizes the need for publicly funded research to be freely available to everyone¹⁷.

Shift to Pure Publish Model

The Swedish Bibsam Consortium has been a driving force in Sweden's ambitious transition to open access (OA) publishing. As part of Sweden's broader commitment to ensure that publicly funded research is freely accessible to the public, the Bibsam Consortium has played a pivotal role in negotiating transformative agreements with major publishers. These agreements are designed to shift scholarly publishing from a traditional subscription-based model to one that ensures universal access to research articles. For Swedish researchers, the switch to the "pure publish" model will make the process of publishing open access more straightforward and less financially burdensome. It will also allow for greater academic freedom, as scholars will be able to publish in high-quality journals without the concern of raising funds for APCs¹⁸.

¹⁷ <https://newsroom.taylorandfrancisgroup.com/taylor-francis-group-and-the-consortium-for-swiss-academic-libraries-sign-transformative-agreement/>

¹⁸ <https://scholarlykitchen.sspnet.org/2020/02/20/pure-publish/>

United Kingdom

The United Kingdom has been at the forefront of advancing open access (OA) policies, particularly regarding publicly funded research. Over the past decade, a series of strategic moves by the government, funding bodies, and academic institutions has pushed for greater access to scholarly research by removing paywalls and making content freely available to the public. This shift aligns with the broader global movement toward OA, which aims to increase the accessibility, visibility, and impact of scientific research.

Key Drivers of Open Access in the UK

Open access policies in the UK have been shaped by several key drivers, including government initiatives, funding agency mandates, and academic institutions' evolving priorities. These drivers are reflected in national strategies, regulatory frameworks, and the development of transformative agreements with publishers.

- 1. The Finch Report (2012):** The publication of the Finch Report in 2012, officially titled *Accessibility, Sustainability, Excellence: How to Expand Access to Research Publications*, marked a pivotal moment in the UK's commitment to open access. The report, commissioned by the UK government, recommended that publicly funded research should be freely available online, setting the stage for significant policy changes¹⁹.
- 2. The Higher Education Funding Council for England (HEFCE) and REF 2021:** The Research Excellence Framework (REF) is a key part of the UK's system for assessing the quality of research across institutions. From REF 2021 onwards, the UK's approach to open access was further formalized, with HEFCE (the Higher Education Funding Council for England) mandating that to be eligible for submission to REF, all journal articles and conference proceedings must be made openly available.²⁰
- 3. UK Research and Innovation (UKRI) Open Access Policy:** UK Research and Innovation (UKRI) is the UK's main public funding body for research, encompassing several research councils (such as the Arts and Humanities Research Council (AHRC), the Biotechnology and Biological Sciences Research Council (BBSRC), and the Economic and Social Research Council (ESRC)). UKRI's open access policy was developed to ensure that research funded by UKRI is made available freely and openly. This policy applies to all outputs from research projects funded by UKRI and has evolved significantly over the years²¹.
- 4. Wellcome Trust Open Access Policy:** The Wellcome Trust, a major biomedical research funder, has long been a champion of open access. Its open access policy requires that all research outputs arising from Wellcome-funded work be made available through open access

¹⁹<https://www.researchinfonet.org/finch/>

²⁰<https://www.ukri.org/who-we-are/research-england/research-excellence/research-excellence-framework/>.

²¹<https://www.ukri.org/publications/ukri-open-access-policy/>

channels. Since 2013, Wellcome has been one of the leaders in pushing for OA, and its policies have often been more stringent than those of other funding bodies²².

Transition to Transformative Agreements: Consortia-Level Agreements

One of the key elements driving the shift to transformative agreements in the UK is the role of consortia-level agreements. These agreements involve multiple institutions, often universities or libraries, working together to negotiate a collective contract with publishers. By pooling resources and negotiating as a group, consortia can achieve better pricing, terms, and benefits than individual institutions could on their own.

In the UK, several consortia are involved in negotiating transformative agreements:

- **JISC:** Jisc is a not-for-profit organization that supports UK universities and research institutions in their engagement with digital resources. Through Jisc, UK institutions have been involved in large-scale negotiations with major publishers like Elsevier, Springer Nature, and Wiley to develop transformative agreements. Jisc's efforts have been central to ensuring that these agreements are fair and aligned with national open access goals.²³
- **UKRI – UK Research and Innovation - NERC:** This consortium brings together a wide range of universities and research institutions to negotiate group contracts that can support the publication of open access content and ensure continued access to subscription-based resources.²⁴
- **UK Health Security Agency:** The UK Health Security Agency is a government agency in the United Kingdom, responsible since April 2021 for England-wide public health protection and infectious disease capability and replacing Public Health England. It is an executive agency of the Department of Health and Social Care²⁵.

These consortia have negotiated transformative agreements with leading publishers, which include provisions for transitioning to open access while maintaining access to legacy content. This approach helps to manage the complexities of the transition from a subscription-based model to one focused on open access publishing.

Examples of Transformative Agreements with Publishers

Several high-profile transformative agreements between UK institutions and major publishers have been established in recent years:

²² <https://wellcome.org/grant-funding/guidance/open-access-guidance/open-access-policy>

²³ <https://www.jisc.ac.uk/reports/a-review-of-transitional-agreements-in-the-uk>

²⁴ <https://www.ukri.org/manage-your-award/publishing-your-research-findings/making-your-research-article-open-access/>

²⁵ <https://esac-initiative.org/about/transformative-agreements/agreement-registry/oxf2022ukhsa/>

- **Elsevier:** In 2020, a landmark transformative agreement between Elsevier and Jisc was announced, covering over 130 UK institutions. The agreement included both read and publish components, where UK institutions continued to have access to Elsevier's extensive journal collection, while simultaneously increasing the number of articles that UK researchers could publish open access.
- **Springer Nature:** Springer Nature signed a transformative agreement with UK institutions in 2019, under which universities could access both Springer's subscription journals and publish research open access. The agreement was designed to gradually increase the number of open access publications over time.
- **Wiley:** In 2020, a transformative agreement between Wiley and Jisc was signed to increase open access publishing. This agreement allowed researchers from UK institutions to publish a set number of open access articles in Wiley journals, while still having access to the full range of Wiley's content.
- **Oxford University Press:** In 2022 the UK Health Security Agency signed an agreement with Oxford university Press. The agreement allows a higher number of outputs to be published in comparison with previous years. In addition, each year the number of allowed outputs increases slightly, and any of the allowance that has not been used up on any given year can roll over and be used in the next year.

Pure Publishing Agreements

While pure open access agreements in the UK may not always be as widely discussed as transformative agreements (which often include hybrid models), there is a growing emphasis on fully open access publishing. This shift is supported by both funding agencies like UKRI and Wellcome Trust and consortia agreements negotiated by organizations such as Jisc. As the UK government and funding bodies continue to push for the universal adoption of open access, pure OA agreements will become an increasingly important part of the academic publishing landscape, supporting the broader transition toward more accessible, equitable, and sustainable models of research dissemination.

Brazil

Brazil has developed a comprehensive and strategic approach to open access (OA) that has positioned the country as a leader in the Latin American open access movement. The country's commitment to open access is supported by a series of national policies, institutional frameworks, and collaborations with international open science initiatives.

Open Access Policies and Directions in Brazil

- 1. Law on Access to Information (2011) – Lei de Acesso à Informação (LAI):** While not specific to academic research, the Law on Access to Information (LAI), enacted in 2011, has played a crucial role in shaping Brazil's open access landscape. The LAI mandates that all public institutions in Brazil must make information freely available to the public, unless there are privacy or security concerns. This law applies to a broad range of public data, including research outputs funded by the government²⁶.
- 2. SciELO Network (1997):** Though not a policy itself, the SciELO (Scientific Electronic Library Online) Network, launched in 1997, has been a foundational element of Brazil's open access infrastructure. SciELO began as a Brazilian initiative and expanded to include Latin American countries, fostering open access to regional scientific journals²⁷.
- 3. National Open Access Policy (2018):** In 2018, Brazil introduced its National Open Access Policy, developed by the Ministry of Science, Technology, and Innovation (MCTI) in collaboration with academic and research stakeholders. This policy formalized the country's commitment to open access and set clear directives for the dissemination of publicly funded research²⁸.
- 4. CAPES Initiatives:** The Brazilian federal agency CAPES (Coordination for the Improvement of Higher Education Personnel) has been a central player in Brazil's open access strategy. CAPES has implemented several initiatives to promote open access publishing and facilitate access to scholarly resources across Brazilian universities and research institutions²⁹.
- 5. National Open Science Strategy (2022):** In 2022, Brazil launched its National Open Science Strategy, reflecting a broader commitment to open access, open data, and transparency in scientific research. This strategy builds on the National Open Access Policy and integrates open science principles into the country's research culture³⁰.

²⁶ https://www.oecd-ilibrary.org/transparency-for-open-government-in-brazil_1e82139d-en.pdf?itemId=%2Fcontent%2Fcomponent%2F1e82139d-en&mimeType=pdf

²⁷ <https://blog.scielo.org/en/2019/12/18/the-scielo-publication-model-as-an-open-access-public-policy/>

²⁸ <https://www.g20.org/en/news/minister-of-science-technology-and-innovation-knowledge-generated-worldwide-should-be-shared>

²⁹ <https://workshopamericas.periodicos.capes.gov.br/en-us/>

³⁰ <https://www.unesco.org/en/fieldoffice/brasilia/expertise/open-science-brazil>

6. Open Access in Public Health Research (SUS and Fiocruz): Brazil's Unified Health System (SUS) and Fiocruz (Oswaldo Cruz Foundation), two major public health institutions, have also adopted policies to promote open access to public health research. These institutions play a significant role in ensuring that government-funded health research is accessible to the public.³¹

Transition to Transformative Agreements:

In Brazil, several key consortia agreements—originally structured as "big deal" subscription models—have transitioned to transformative agreements (TAs) in alignment with the global shift toward open access. These transitions are part of a broader effort to make research outputs more accessible while maintaining sustainable models for scholarly publishing. Below are some notable examples of consortia big deal agreements in Brazil that have evolved into transformative agreements:

1. CAPES/Elsevier Agreement: In 2017, Brazil's CAPES negotiated a transformative agreement with Elsevier, marking a shift from a subscription-based model to one that integrated open access publishing. The deal allowed Brazilian authors to publish their articles in Elsevier journals under open access terms without paying Article Processing Charges (APCs). In return, CAPES continued to provide access to Elsevier's subscription-based journals for institutions across Brazil, ensuring that institutions could access content while supporting the country's movement toward open access³².

2. Capes/Springer Nature Agreement: In 2020, Brazil signed a transformative agreement with Springer Nature, transitioning from a big deal subscription model to a hybrid model. Under this new agreement, Brazilian researchers were granted the ability to publish open access in Springer Nature's hybrid journals without incurring the typical APC fees, a move that aligned with Brazil's national open access strategy and its goal of increasing the number of OA publications from Brazilian scholars³³.

3. Capes/Wiley Agreement: Brazil's transition to a transformative agreement with Wiley came into effect in 2021. Under this agreement, Brazilian researchers were able to publish open access in Wiley's hybrid journals without paying APCs. This move reflected Brazil's commitment to increasing OA publishing in high-impact journals while maintaining access to traditional subscription-based content.³⁴

4. Universidade Estadual de Campinas and Taylor and Francis: Authors at Universidade Estadual de Campinas may be eligible to publish open access in Taylor & Francis or Routledge journals at no cost to themselves thanks to an open access agreement between the university and Taylor & Francis. The agreement allows Universidade Estadual de Campinas

³¹ <https://portal.fiocruz.br/en/documento/policy-open-access-knowledge>

³² <https://www.elsevier.com/open-access/funding-arrangements/capes>

³³ <https://www.knowledgespeak.com/news/springer-nature-and-capes-announce-landmark-transformative-agreement-driving-oa-in-brazil/>

³⁴ <https://newsroom.wiley.com/press-releases/press-release-details/2018/New-National-License-Agreement-Provides-Brazil-with-Unlimited-Access-to-the-Cochrane-Library/default.aspx> .

authors to publish open access in Taylor & Francis and Routledge Open Select (hybrid) and full open access journals at no cost³⁵.

Pure Publish consortia agreements in Brazil are not widely discussed or explicitly documented.

³⁵ <https://www.tandfonline.com/openaccess/members/universidade-esatdual-de-campinas>

Colombia

Colombia's commitment to Open Access (OA) has evolved through a series of strategic policies and initiatives designed to improve access to publicly funded research and align the country with global open science trends.

Open Access Policies in Colombia

The foundation for Colombia's open access policies was laid with the National Science, Technology, and Innovation Policy of 2002³⁶, which set the stage for further development in the research and academic sectors. This policy encouraged research transparency and fostered a national infrastructure for disseminating scientific knowledge. Over the next decade, Colombia's scientific community increasingly recognized the importance of making research outputs freely available to the public, setting the groundwork for more formal open access initiatives.

In 2013, Colombia's National Council of Science and Technology (Colciencias) issued a key Open Access Policy that emphasized the dissemination of scientific knowledge produced by national researchers. This policy established guidelines for making publicly funded research accessible through open access platforms, particularly institutional repositories and open access journals. Additionally, Colciencias promoted initiatives such as the RedCOLSI (Colombian Network of Scientific Societies), which sought to enhance the visibility of Colombian research and align with international open access efforts³⁷.

In 2019, Colombia took a major step forward by integrating open access into its broader research and development strategy through the National Open Science Strategy. This strategy, developed by Colciencias (now part of the Ministry of Science, Technology, and Innovation, Minciencias), outlined Colombia's commitment to open science and set specific goals for promoting open access to research publications and data. The strategy includes mechanisms for improving access to scientific literature, encouraging data sharing, and supporting the creation of open repositories.

Transitioning to Transformative Agreements

Colombia has been active in transitioning from traditional subscription-based "Big Deal" agreements with major publishers to Transformative Agreements (TAs) that support open access (OA) publishing. Below are some notable examples of Big Deal agreements in Colombia that have transitioned into Transformative Agreements.

1. Red Colombiana de Bibliotecas (REDCIB) and Elsevier: In Colombia, the Red Colombiana de Bibliotecas (REDCIB), which is a network of libraries across the country, signed a transformative agreement with Elsevier in 2020. Under this agreement, Colombian researchers from participating institutions could publish articles in Elsevier's hybrid journals

³⁶ <https://stip.oecd.org/stip/interactive-dashboards/countries/Colombia#:~:text=Centres%20of%20excellence%20grants%20Creation,%2C%20benchmarking%20and%20f>

³⁷ <https://web.redcolsi.org/>

without paying Article Processing Charges (APCs). This allowed the transition to open access while still using hybrid journals, where some content is subscription-based, and other articles are made openly available. The agreement also continued to provide access to Elsevier's collection of scientific journals. The key difference was that it also included provisions for OA publishing, making research outputs from Colombia more accessible to the global community. This agreement was part of a broader strategy to move towards fully open access publishing over time, helping Colombian researchers transition from the subscription-based model to open access, aligning with Plan S and the global push for open science³⁸.

2. Sistema de Información sobre Investigación y Creación (SPOC) and Springer Nature – Transformative Agreement: In 2021, the Sistema de Información sobre Investigación y Creación (SPOC), a Colombian consortium for research and academic libraries, negotiated a transformative agreement with Springer Nature, one of the largest academic publishers globally. The agreement marked a transition from Big Deal subscription access to open access publishing for Colombian researchers. The agreement allowed Colombian authors from participating institutions to publish articles in Springer's hybrid journals without incurring APCs, removing a significant barrier to open access publishing. SPOC members continued to have access to Springer's large collection of research articles, but the emphasis was placed on transitioning towards open access. Springer agreed to gradually increase the proportion of open access content published through the agreement, aligning with the growing demand for fully open access journals and providing a clear path for transitioning from a subscription-based system³⁹.

3. Colombian National University (UNAL) and Wiley – Transformative Agreement: The National University of Colombia (UNAL), one of the leading universities in the country, signed a transformative agreement with Wiley in 2020. This agreement was aimed at transitioning from the traditional subscription-based model to a system that promotes open access publishing. This agreement allows UNAL researchers to publish open access in Wiley's hybrid journals without having to pay APCs, enabling Colombian researchers to make their work freely available to the global research community. The agreement continued to provide access to Wiley's extensive journal portfolio (the "read" part), but also incorporated provisions for publishing open access (the "publish" part), marking a shift toward open access within the context of a subscription agreement. The agreement is structured to gradually transition more content into open access, with a goal of eventually having a larger proportion of content made freely available as part of the university's and publisher's commitment to open science⁴⁰.

4. Red Nacional Académica de Tecnología Avanzada (RENATA) and Taylor & Francis – Transformative Agreement: The Red Nacional Académica de Tecnología Avanzada (RENATA), which connects universities, research centers, and educational institutions across Colombia, also entered into a transformative agreement with Taylor & Francis. This agreement transitioned a Big Deal subscription to an open access model, further supporting

³⁸ <https://www.elsevier.com/open-access/agreements/colombia>

³⁹ <https://www.springernature.com/gp/open-science/oa-agreements/colombia>

⁴⁰ <https://esac-initiative.org/about/transformative-agreements/agreement-registry/wiley2023puj/>

Colombia's move towards greater accessibility and openness in academic publishing. Under this agreement, RENATA members could both access Taylor & Francis journals and publish their research in open access without additional APCs. This made it easier for Colombian researchers to publish OA, without the financial burden often associated with APCs⁴¹.

5.Colombia Consorcio and Taylor and Francis: The Colombian open access agreement offers researchers the option to publish open access in Taylor & Francis and Routledge Open Select (hybrid) journals at no cost to themselves. This open access agreement allows Colombia researchers access to subscription articles, as well as corresponding authors at participating Colombia Consorcio institutions to publish open access in over 2,000 journal titles⁴².

Pure Publish agreements, which typically refer to full **open access** publishing models without any subscription-based content, have not been widely adopted or specifically documented in Colombia.

⁴¹ <https://www.tandfonline.com/doi/full/10.1080/01930826.2023.2287945>

⁴² <https://www.tandfonline.com/openaccess/members/colombia-consorcio>

Mexico

Open Access Policies in Mexico

Mexico has developed a series of policies over the past two decades to promote Open Access (OA) in research, aligning itself with international initiatives and aiming to increase the accessibility of publicly funded scientific knowledge. The country's first significant step toward open access came in 2004, when the National Council of Science and Technology (CONACYT) introduced its National Science and Technology Development Plan (PNDCT). This plan emphasized the need to improve the visibility and dissemination of Mexican research. While not a full OA policy, it laid the groundwork for later developments by highlighting the importance of scientific communication and access to knowledge. Additionally, the Mexican government began investing in digital infrastructure, which would later support the development of open access repositories and platforms⁴³.

In 2012, Mexico took a more direct step with the creation of the Open Access Policy of CONACYT. This policy focused on the open dissemination of publicly funded research, encouraging Mexican researchers and institutions to deposit their research outputs in institutional repositories and publish in open access journals. The policy's primary aim was to increase the national and international visibility of Mexican research while ensuring that publicly funded research was accessible to a wider audience. By establishing guidelines for institutional repositories and urging researchers to follow open access principles, CONACYT aligned Mexico with the global movement for open science and transparency, similar to the actions taken by other Latin American countries at the time.

A major milestone came in 2018 with the formal adoption of the National Open Science Policy by Mexico's National Council for Science and Technology (CONACYT). This comprehensive policy explicitly prioritized open access as a key component of the national science and technology strategy. It aimed to make all publicly funded research freely available through open access channels, including journals, repositories, and data-sharing platforms. The policy aligned with international open access initiatives like Plan S and sought to integrate open access into Mexico's academic and research culture. This marked a clear shift towards a more structured and coordinated national effort to open up Mexican scientific knowledge to the global community, encouraging greater collaboration and participation in the global open science ecosystem. The policy also introduced measures to support training and infrastructure for OA publishing and data sharing across Mexican research institutions⁴⁴.

⁴³ <https://infojustice.org/archives/32791>

⁴⁴ https://research-and-innovation.ec.europa.eu/document/download/33296884-4b37-41e3-8aa9-6253d6d4cecf_en?filename=joint_communique_eu-mexico_092020_en.pdf&prefLang=en

Transition to Transformative Agreements

In Mexico, the transition from Big Deal subscription agreements to Transformative Agreements (TAs) is part of a broader trend of moving toward open access (OA) in academic publishing. These transformative agreements are intended to shift the publishing model from subscription-based access to open access publishing, where articles are made freely available without financial barriers, often funded by institutional or consortia agreements. Below are some notable examples of Big Deal agreements in Mexico that have transitioned to Transformative Agreements:

1. Universidad Nacional Autónoma de México (UNAM) and Rockefeller University Press (RUP): This agreement covers RUP's three hybrid journals and runs from September 1, 2022 to December 31, 2025. This is unlimited Read-and-Publish transformative agreement with Rockefeller University Press (RUP) covers RUP's three hybrid journals: *Journal of Cell Biology (JCB)*, *Journal of Experimental Medicine (JEM)*, and *Journal of General Physiology (JGP)*. The agreement runs from September 1, 2022 to December 31, 2025⁴⁵.

2. Multiple Universities and IOP: All corresponding authors who are current staff members, researchers (permanent, temporary and/or visiting), or students at one of the institutions listed below at the time of submission, can publish open access at no cost to themselves. The corresponding author is the author who submits the manuscript and is responsible for communicating with the journal during the submission, peer review and publication process⁴⁶.

3. Red de Bibliotecas Universitarias de México (REDBUM) and Springer Nature – Transformative Agreement: Another important transformative agreement in Mexico was the agreement between Red de Bibliotecas Universitarias de México (REDBUM), a national consortium of Mexican university libraries, and Springer Nature⁴⁷.

4. UNAM and Wiley: Wiley and UNAM have an agreement which allows eligible authors to publish open access without paying an article publication charge (APC). The cost of publishing is covered under the terms of the agreement⁴⁸.

Pure Publish agreements have not yet become widespread in Mexico

⁴⁵ . <https://rupress.org/journals/pages/read-and-publish-unam#:~:text=Universidad%20Nacional%20Aut%C3%B3noma%20de%20M%C3%A9xico%20unlimited%20Read%2Dand%2DPublish%20transformative,2022%20to%20December%2031%2C%202025>

⁴⁶ <https://publishingsupport.iopscience.iop.org/questions/mexico/#:~:text=Home,List%20A%2C%20B%20and%20D>

⁴⁷ <https://publishingperspectives.com/2022/11/springer-nature-announces-a-transformative-agreement-in-mexico/#:~:text=With%20a%20stand%20at%20Guadalajara's%20fair%2C%20Springer,Book%20Fair.%20Image:%20FIL%20Guadalajara%2C%20Nabil%20Quintero.>

⁴⁸ <https://authorservices.wiley.com/author-resources/Journal-Authors/open-access/affiliation-policies-payments/unam-agreement.html>

United States

Open Access Policies in the USA

The United States has taken gradual but important steps toward promoting open access (OA) in research over the past few decades. The first significant national policy emerged in 2008 with the **National Institutes of Health (NIH) Public Access Policy**⁴⁹. This policy required that all research funded by the NIH be made publicly accessible through the PubMed Central (PMC) repository. Initially, it applied to only a subset of NIH-funded research, but it marked a critical turning point by setting a precedent for making publicly funded research freely available to the public. The policy was aimed at increasing the visibility and impact of U.S.-funded research while also advancing the global open access movement. Over time, the policy expanded to cover a broader range of NIH-funded studies, and in 2013, it became mandatory for all peer-reviewed manuscripts resulting from NIH funding to be deposited in PubMed Central within 12 months of publication.

In the years that followed, the U.S. government expanded its open access policies beyond NIH funding. In 2013, the **White House Office of Science and Technology Policy (OSTP)** issued a Memorandum on Increasing Access to the Results of Federally Funded Scientific Research, which directed federal agencies with annual research budgets over \$100 million to develop policies ensuring that the results of publicly funded research would be made available to the public⁵⁰. This memo led to the development of open access policies across multiple federal agencies, including the Department of Energy (DOE), National Science Foundation (NSF), and Department of Defense (DoD). The OSTP memo helped lay the groundwork for a more unified and systematic approach to open access in the U.S., encouraging agencies to adopt policies requiring the deposit of manuscripts and data into publicly accessible repositories.

A major milestone in the U.S. open access landscape came in 2022 with the **American Rescue Plan (ARP) Act**, which included a provision mandating that all U.S. federal agencies with research budgets of \$100 million or more adopt full open access policies for all research outputs⁵¹. Under the Office of Science and Technology Policy's (OSTP) guidance, this policy required that all peer-reviewed publications resulting from federal funding be made available without any embargo period, effectively supporting the transition to immediate open access. This shift aligns with global initiatives like Plan S and signifies a stronger commitment to open science in the U.S. The policy is designed to increase public access to the results of federally funded research, enhance the reproducibility and transparency of scientific work, and improve equity in access to knowledge. By 2026, all U.S. federal agencies are expected

⁴⁹ <https://grants.nih.gov/grants/nih-public-access-plan.pdf>

⁵⁰ <https://www.whitehouse.gov/ostp/news-updates/2022/08/25/ostp-issues-guidance-to-make-federally-funded-research-freely-available-without-delay/>

⁵¹ <https://www.transit.dot.gov/funding/american-rescue-plan-act-2021>

to comply fully with this policy, marking a significant step forward in the U.S.'s open access journey⁵².

Transition to Transformative Agreements

In the United States, several prominent consortia have moved from traditional Big Deal subscription agreements to Transformative Agreements (TAs) in order to advance the transition to open access (OA) publishing. These agreements, typically referred to as "read-and-publish" agreements, allow institutions to maintain access to subscription-based journals while also enabling their researchers to publish open access without incurring additional costs. Below are examples of major American consortia that have made this shift:

1. The Big Ten Academic Alliance (BTAA) and Wiley – Transformative Agreement: The Big Ten Academic Alliance (BTAA), a consortium of 14 research universities in the United States, transitioned from a Big Deal subscription model to a transformative agreement with Wiley in 2020. This agreement marked a significant shift toward open access publishing within the group. Under the terms of the agreement, BTAA institutions retained access to Wiley vast journal portfolio but also gained the ability to publish articles open access in Wiley hybrid journals without paying Article Processing Charges (APCs). This allowed researchers from BTAA member institutions to publish open access without the typical financial burden associated with hybrid journals, accelerating the move toward fully open access content⁵³.

2. California Digital Library (CDL) and Springer Nature – Transformative Agreement: In 2020, the California Digital Library (CDL), which manages the University of California's library system, signed a transformative agreement with Springer Nature. This agreement was part of a broader initiative by the University of California to transition from traditional Big Deal subscriptions to open access publishing. Under this agreement, UC faculty members could publish in Springer's hybrid journals without paying additional APCs, while still maintaining access to Springer's full journal catalogue. This transition was part of the University of California's efforts to achieve a "read and publish" model with major publishers. The agreement allowed UC researchers to publish open access in Springer's hybrid journals, with APCs covered by the agreement itself, while still providing subscription access to Springer's vast journal portfolio. The agreement included provisions to scale open access publishing and expand its reach across UC's academic community. This initiative reflected a broader push to make UC's research outputs more accessible globally⁵⁴.

3. University of California and Elsevier – Transformative Agreement: Another significant example comes from the University of California (UC), which, in 2019, famously ended its long-standing Big Deal subscription agreement with Elsevier after failing to reach an agreement on pricing and access. In the aftermath, the University of California entered into a

⁵² <https://www.whitehouse.gov/ostp/news-updates/2022/08/25/ostp-issues-guidance-to-make-federally-funded-research-freely-available-without-delay/>

⁵³ <https://btaa.org/library/open-scholarship/agreements/wiley-open-access-agreement>

⁵⁴ <https://www.springernature.com/jp/librarians/open-research-for-librarians/sn-oa-agreements/oaforcalifornia>

transformative agreement with Elsevier in 2020 to align with the "read and publish" model. The transformative agreement allowed UC faculty to publish their research open access in Elsevier's hybrid journals without the usual APCs, while continuing access to Elsevier's scientific journals. UC authors can publish in Elsevier journals open access, with the costs covered by the institutional agreement, thus removing financial barriers to OA publishing. UC continues to have access to Elsevier's full collection of journals while transitioning to a more sustainable OA publishing model over time⁵⁵.

4. The Greater Western Library Alliance (GWLA) and Taylor and Francis –

Transformative Agreement: The Greater Western Library Alliance (GWLA), which represents libraries from a range of universities and research institutions across the western United States, signed a transformative agreement with Wiley in 2021. The agreement allowed researchers from GWLA member institutions to publish open access in T&F hybrid journals without incurring additional fees, as well as retain access to T&F journal collection. This was part of GWLA's long-term strategy to support open access while ensuring that member institutions continued to have access to critical subscription content. The deal combines access to T&F subscription-based content with the opportunity to publish OA, contributing to the transition toward fully open access over time⁵⁶.

5. The OhioLINK Consortium and Cambridge University Press – Transformative

Agreement: In 2020, the OhioLINK Consortium, which serves academic libraries across Ohio, entered into a transformative agreement with Cambridge University Press. This agreement allowed member institutions to continue accessing Cambridge's subscription-based journals while enabling their researchers to publish open access in Cambridge's hybrid journals without additional costs. OhioLINK institutions-maintained access to Cambridge University Press's journal collection, but also gained the ability to publish open access, shifting toward a more sustainable open publishing ecosystem⁵⁷.

Pure Publish agreements—in which all content is published open access with no subscription elements—are still rare in the U.S

⁵⁵ <https://www.elsevier.com/open-access/agreements/scelc-consortium>

⁵⁶ <https://www.tandfonline.com/doi/full/10.1080/0361526X.2012.652524>

⁵⁷ https://www.ohiolink.edu/sites/default/files/uploads/OhioLINK%20Open%20Access%20Agreements%20Summary_V2_0.pdf

Conclusion and Recommendations

The transition from traditional "Big Deal" subscription models to transformative agreements represents a critical shift in the academic publishing landscape. This shift is not only driven by the need for broader access to scholarly research but also by the growing recognition of the benefits of open access (OA) in enhancing the visibility and impact of research. As more institutions and consortia move toward these agreements, it is essential to recognize the multiple advantages of OA, both in terms of accessibility and the scholarly ecosystem's overall health. These agreements, which facilitate open access publishing while maintaining subscription access to journals, serve as an important bridge between the current paywall-based system and the future goal of full OA. They allow institutions to support open access publishing without the burden of paying for both access and publication simultaneously, making research outputs freely available to a global audience.

Recommendations:

- 1. Adopt and Strengthen Open Access Policies:** Research institutions, funding bodies, and governments need to adopt clear OA policies to guide the transition. These policies should encourage authors to publish in OA venues and ensure that publicly funded research is made available without paywalls. Institutions should set clear mandates for OA publication to create an environment where researchers feel supported in choosing OA outlets.
- 2. Provide Author Support for Open Access Publishing:** To encourage greater adoption of OA publishing, institutions should offer robust support to authors. This can include funding for article processing charges (APCs), guidance on choosing appropriate OA journals, and support for navigating the complexities of OA publishing contracts. By easing the financial and administrative burden on authors, institutions can make OA publishing a more attractive option, thus increasing the volume of open access publications.
- 3. Incentivize OA Publishing to Increase Impact and Citations:** Research has shown that OA publications often have higher visibility, greater reach, and more citations compared to those behind paywalls. Institutions should incentivize OA publishing by recognizing it in tenure and promotion decisions, research evaluations, and institutional rankings. This will encourage researchers to publish in OA journals, further driving the positive cycle of increased impact and higher citation rates.
- 4. Collaborate in Transformative Agreements:** Universities and research consortia should engage in transformative agreements with publishers, which can facilitate a smoother transition to a fully OA system. These agreements, which support the publication of research open access while ensuring access to existing journal content, will be a critical part of the funding model in the transition period.
- 5. Monitor and Evaluate Progress:** It is essential to monitor the impact of transformative agreements and OA policies regularly. This includes tracking the number of OA publications, citation impact, and the financial sustainability of the publishing ecosystem. Continuous

evaluation will help identify areas for improvement and ensure that the transition to a fully open access system is effective and sustainable.

Conclusion:

The move toward transformative agreements and open access publishing holds immense promise for the future of scholarly communication. By supporting the transition through clear policies, author support, and incentives, institutions can maximize the benefits of OA publishing, ensuring that research is accessible, impactful, and sustainable. The broader adoption of OA will not only democratize access to knowledge but also improve the visibility and impact of scholarly work, benefiting researchers, institutions, and society.

Open Databases to Track Trends

The Global Open Access Portal (GOAP): includes country-specific profiles highlighting key Open Access initiatives, mandates, events, and publications, and supports the publishing of non-commercial journals through user-friendly workflows. <https://goap.info/>

SPARC Big Deal Knowledge Base: Although sunset in 2023 still contains expenditures <https://sparcopen.org/our-work/big-deal-knowledge-base/> Current information is available on Big Deal cancellations <https://sparcopen.org/our-work/big-deal-cancellation-tracking/>

ESAC: open community of information professionals dedicated to putting the vision of open access to research into practice. Transformative agreements and open access tracking: <https://esac-initiative.org/about/transformative-agreements/>

Elsevier Transformative Agreements website: <https://www.elsevier.com/open-access/agreements>

Wiley Transformative Agreements website: <https://editors.wiley.com/page/wiley-transformational-agreements>

Springer Nature Transformative Agreements website: <https://www.springernature.com/gp/open-science/oa-agreements>