MOVING OA FORWARD

FROM TRANSFORMATION
TO COLLECTIVE RESPONSIBILITY

17th Berlin Open Access Conference
5–6 February 2025
Harnack House, Berlin, Germany

Conference report

open access
2020

OPEN ACCESS HAS PASSED THE TIPPING POINT

Open access has crossed a historic threshold. By 2024, more than 50 % of global scholarly articles are openly accessible—a dramatic transformation from just 20 % in 2016. National research systems at the forefront of this transformation have achieved over 80 % open access by integrating OA negotiations into their open science agendas and efforts to strengthen scientific integrity and public trust, demonstrating that the transition is not only feasible but well underway. Major research nations including the USA, India, and China are increasingly embracing this transformation, signaling a truly global momentum.

This milestone represents more than statistical progress—it marks a fundamental shift requiring new strategic thinking. The research community must now move from advocacy to stewardship, taking active control of the scholarly publishing transition rather than simply participating in it. °

—IT'S TIME TO TURN PROGRESS INTO PRACTICE

STRATEGIC IMPERATIVES FOR CHIEF NEGOTIATORS

SHIFT FROM NEGOTIATION TO INVESTMENT STRATEGY

The transition to open access requires viewing publishing agreements as strategic investments rather than procurement transactions. Successful institutions have demonstrated that breaking from subscription logic and redirecting funds to follow author publishing patterns can achieve cost-neutral or cost-positive outcomes while dramatically increasing open access rates.

European pioneers have proven that institutions can "flip their investments" even when publishers haven't yet flipped their portfolios, achieving stable budgets while eliminating double payments. The key is comprehensive analysis of publishing dynamics and diversified approaches that support the broader open access ecosystem, including diamond open access, Subscribe to Open models, and community-driven initiatives.

ASSERT ACADEMIC SOVEREIGNTY IN SCHOLARLY PUBLISHING

In an information society where knowledge drives innovation and progress, the research community must not cede knowledge governance to commercial interests. Decisions about copyright ownership and licensing fundamentally determine who controls the research literature and how it can be used to advance scholarship and benefit society. Upholding academic sovereignty requires that scholars and their institutions actively support authors in retaining copyright and adopting open licenses such as CC BY by default—ensuring that publicly funded research serves the widest possible public and scholarly good.

This principle extends beyond individual articles to encompass computational research methodologies, including text and data mining and artificial intelligence applications. It is the academic community—not publishers—that must determine which methods best support the advancement of research. Open licensing, particularly CC BY, is essential to ensuring that institutions of all sizes and capacities can equitably participate in an AI-driven future of knowledge production and scholarly communication.

DEMAND TRANSPARENCY ACROSS ALL DIMENSIONS

Progress toward equitable open access requires unprecedented transparency from all stakeholders. Publishers must collaborate with the research community to provide full visibility into publication data, pricing structures (including waivers, discounts, and geographic pricing), and quality assurance standards.

The community has made clear that transparency is the top priority for advancing negotiations. This includes understanding multi-year cost trajectories, additional fees not directly tied to open access publishing, and how pricing decisions are made across different regions and consortia.

ALIGN FINANCIAL FLOWS WITH EQUITY PRINCIPLES

The ultimate goal is ensuring that financial barriers never determine who can publish and that investments in scholarly publishing reflect fair, transparent structures supporting an inclusive environment. As institutions shift from subscriptions to open access, publishers must adapt pricing accordingly—in many cases requiring revenue reductions to achieve fairer cost distribution.

Institutions with high research output must have confidence that their investments reflect genuine costs of responsible open access publishing, rooted in transparent cost structures and inclusivity rather than entrenched profit expectations. °

ACTION ITEMS FOR INSTITUTIONAL LEADERSHIP

START NOW

– **Investment analysis and reallocation** Conduct comprehensive audits of institutional subscription expenditures to identify funds available for redirecting toward open access publishing initiatives and community-owned infrastructure.

– **Transformative agreements as transition strategy** Leverage transformative agreements with publishers as strategic stepping stones toward building a diversified open research investment portfolio that prioritizes community ownership.

– **Transparency and progress tracking** Ensure transformative agreements are entered in the ESAC Registry to enable community-wide visibility and establish benchmarks for measuring advances.

– **Open licensing standards** Establish CC BY licensing as the standard in all publisher agreements to ensure maximum accessibility and reuse rights for research outputs.

STRATEGIC ALIGNMENT

– **Global initiative engagement** Participate actively in OA2020, ESAC, and similar coalitions to amplify collective negotiating power and establish new benchmarks for open access publishing and research dissemination.

– **Strategic publisher partnerships** Prioritize collaborations with publishers who demonstrate commitment to equity, quality, transparency, and openness in their publishing practices and business models.

– **Community-driven infrastructure development** Strengthen partnerships that support locally-owned scholarly publishing platforms and shared infrastructure initiatives led by academic communities.

SYSTEM REFORM

– **Research assessment reform** Collaborate with institutions and funders to establish evaluation metrics focused on research quality and societal impact, empowering researchers to publish through diverse open channels for career advancement.

– **Policy and funding alignment** Engage policymakers to direct funding toward open science infrastructure, institutional repositories, and sustainable publishing alternatives.

– **Research information systems** Transform institutional frameworks to support comprehensive sharing of research data, code, preprints, and publications, establishing integrated open science ecosystems that enable transparent and collaborative research practices. ⚬

THE PATH FORWARD

Open access is not an endpoint but the foundation for a more equitable, inclusive research ecosystem. With more than half of scholarly articles now openly accessible, the research community stands at a critical juncture. The infrastructure, agreements, and community practices developed over the past decade provide the foundation for completing the transition.

Success requires decisive leadership from institutions, funders, and consortia working in coordinated fashion. The alternative—remaining in the subscription system with its inherent deficiencies in terms of access, cost-efficiency, transparency, and restrictions of use that favor publishers over authors—will perpetuate inequities and limit the potential benefits of publicly funded research.

The OA2020 community remains committed to providing resources, insights, and coordination needed to complete this transformation. The question is no longer whether open access will succeed, but how quickly and equitably the transition can be completed. ●

The 17th Berlin Open Access Conference brought together over 150 representatives from academic institutions, national negotiation teams, and research funding organizations spanning more than 40 countries. The conference theme emphasized that only through collaborative efforts among all stakeholders can the open access transition effectively support researchers and promote openness in science. A rich offering of posters from diverse national and institutional delegations at the conference showcased how this shift is being realized on the ground, highlighting practical strategies, policy frameworks, and implementation experiences from across the globe.

Two pre-conference events provided essential preparation. The OA2020 Summit of Chief Negotiators enabled strategic alignment among community leaders, with representatives from multiple countries on scaling transformative agreements and managing rapid publication growth—contributing diverse perspectives on regional challenges and opportunities. Meanwhile, a workshop led by ESAC experts provided delegates— particularly those new to open access negotiations—with insights into key benchmarks, challenges, and opportunities in the evolving scholarly publishing landscape.

DAY 1 **ASSESSING PROGRESS AND LOOKING AHEAD**

OPENING REFLECTIONS

Following institutional welcomes from OA2020 Intiative coordinator and B17 director **Colleen Campbell** and Max Planck Society Open Science advisor **Richard McElreath**, conference co-chairs **Ulrich Pöschl** and **Gerard Meijer** set a collaborative and forward-looking tone, calling for renewed collective purpose in the open access transition. Reflecting on progress since the first Berlin conference in 2003—where some institutions now exceed 90% open access conversion— they emphasized that the global transition remains incomplete. Pöschl urged the community to build on proven models and extend them worldwide, integrating next-stage priorities such as open data and open peer review. Meijer reinforced the need for shared strategies and structural change, encouraging participants to move beyond negotiation and act together as stewards of a more open and equitable research ecosystem.

AUTHOR RIGHTS AND LICENSING

Rich Schneider (University of California, San Francisco) opened discussions by addressing copyright and author rights—the foundational drivers at the heart of the open access movement. He shared the UC's advocacy around License to Publish agreements, emphasizing how coordinated pressure from an increasingly aligned global research community—now engaging publishers on equal footing—has driven changes in publisher practices. To illustrate, he highlighted how the constructive dialogue at B16 helped prompt publishers like Cambridge University Press and Elsevier to revise their licenses in response to the expectations of the community.

The subsequent publisher panel explored licensing strategies, with representatives from major publishing organizations discussing their evolution toward non-exclusive licenses and responses to author concerns about AI developments. The conversation revealed ongoing friction between author rights and commercial interests while addressing skepticism about publishers' intentions regarding AI training.

GLOBAL EQUITY CHALLENGES

Ellen Tise (Stellenbosch University and SANLiC) and **Alicia Kowaltowski** (University of São Paulo) introduced critical discussions on inequities impacting researchers, libraries and library consortia in the Global South. Against the backdrop of persistent financial barriers and urgent needs for decolonizing knowledge, speakers highlighted various equity initiatives including broad funding for open access publishing to alleviate author-facing fees, transformative agreements, geopricing pilot programs, publisher APC waivers and discounts, and community engagement activities.

The discussion further emphasized the importance of multilingualism, national capacity building, investment in local journals, support for preprints and cost reduction strategies.

ARTICLE GROWTH AND PUBLICATION ETHICS

Susan Reilly (Irish Research eLibrary) and **Curtis Brundy** (Iowa State University) opened the session with a frank discussion of the vulnerabilities stemming from the growth in scholarly publishing and related challenges to publication ethics, aiming to clarify the responsibilities of both the research and publishing communities in addressing them.

Concerns were raised that commercial incentives may be prompting publishers to relax quality standards to increase article volume and open access revenue, citing recent editorial board resignations and a surge in publication fraud, including paper mills and AI-generated manipulation. In response, publisher representatives acknowledged these pressures and affirmed their role in safeguarding publication ethics, emphasizing the substantial investments made in dedicated integrity teams, advanced detection technologies, and proactive measures to uphold ethical standards.

The discussion underscored a central tension in scholarly publishing: the pressure

to prioritize quantity over quality, fueled by both commercial imperatives and institutional incentives that reward publication volume. These dynamics, compounded by library budgets still structured around legacy subscription models, risk undermining the sustainability of open access. Participants emphasized the need for rethinking funding frameworks and establishing shared standards to safeguard integrity and transparency throughout the publishing ecosystem.

STAKEHOLDER DIALOGUE

In a high-level roundtable, research leaders and senior publisher representatives came together to examine the state of the open access transition and explore how to strengthen trust and partnership in the next phase. Facilitated by **Günter Waibel** (California Digital Library), the discussion opened with a reaffirmation of the shared belief that open access should serve the public good, grounded in author rights and unrestricted reuse of scholarly outputs. This foundational vision framed a candid conversation about where the transition stands and how responsibilities must evolve.

The panelists acknowledged frustration with the pace and visibility of progress in open access made through transformative agreements. A strong case was made for collaborative, transparent tracking of open access outcomes, enabling both libraries and publishers to assess the return on investment and make informed adjustments as the transition progresses.

Financial tensions also surfaced, particularly around the fairness and transparency of current models. Institutional voices emphasized that prices should reflect the true cost of publishing services—not legacy structures or added costs for fundamental responsibilities like maintaining publication ethics.

Ethical concerns added further complexity to the discussion. The group reflected on the mounting pressures that commercial incentives place on editorial and peer review standards. As fraud, paper mills, and AI-generated content challenge established norms, the panel stressed the importance of joint responsibility. There was broad agreement on the need for greater transparency in the peer review process and stronger institutional support for reviewers as essential contributors to scholarly quality.

Finally, the discussion turned to the growing impact of artificial intelligence. While AI holds promise for accelerating research, restrictive clauses in publishing contracts may limit researchers' ability to interact with their own publications. Some warned of a troubling trend: closed content being positioned as proprietary input for AI models, potentially introducing new barriers to access. In response, university representatives reiterated that openness is not a technical preference, but a foundational condition for scientific progress in the AI era.

The session closed on a sober but forward-looking note. Despite the shared ambition of achieving full open access, questions remain about whether current business models can deliver that goal. The panelists urged one another to move beyond half-commitments, calling for greater transparency, mutual accountability, and a renewed spirit of collaboration to break through the limitations of a status quo still tethered to subscription models and the persistent inefficiencies of hybrid open access.

COMMUNITY REFLECTION

The final session of Day 1 invited delegates to reflect on earlier discussions and consider the evolving challenges in academic publishing. Emphasizing collective responsibility, participants explored key issues such as research integrity, transparency, and the impact of AI on licensing and publishing practices. The conversation underscored the need for innovative, collaborative models involving universities, publishers, and research committees to address scientific misconduct, legacy funding and pricing frameworks, and the integration of AI tools. Delegates highlighted the importance of developing better metrics, ensuring adherence to Creative Commons licenses, and finding pragmatic solutions that balance open access goals with emerging technological realities. The session closed with a strong call for leadership, transparent communication, and community-driven efforts to advance positive change in scholarly publishing. ○

DAY 2 GLOBAL PERSPECTIVES AND STRATEGIC DIRECTIONS

REGIONAL PROGRESS REPORTS

Day 2 opened with presentations from various global regions, each addressing open access implementation progress and challenges in their respective contexts.

India **Deepali Kuberkar** from Tata Memorial Hospital, Department of Atomic Energy (DAE) showcased the groundbreaking "One DAE, One Subscription" initiative, making it the first public-funded institution in India to establish transformative agreements with Wiley and Springer Nature. These agreements have tripled citations and doubled usage while maintaining cost neutrality, providing a blueprint for the country's "One Nation, One Subscription" initiative launched in 2024.

China **Liu Xiwen** from the National Science Library of the Chinese Academy of Sciences highlighted that with 25% of China's publications already published open access, the high additional costs for open access publications within the traditional subscription system have reached prohibitive levels, creating barriers to further openness. With strong government backing and UNESCO Recommendation implementation, over 100 Chinese institutions have adopted transformative agreements. However, these cost pressures are driving increased focus toward community-led initiatives like PubScholar and SciOpen.

Kenya **Arnold Mwanzu** from the Kenya Libraries and Information Services Consortium outlined the significant challenges that institutions in the region face, particularly limited funding to support readers and authors engaging with international journals, alongside indexing disparities that constrain regional journals as viable alternatives. While major publishers have yet to offer transformative agreement opportunities to the consortium, Kenya has secured two agreements with Oxford University Press and Taylor & Francis, though the capacity for supporting author publication costs remains modest. In response to these constraints, the region has prioritized green open access strategies through 59 institutional repositories while fostering broader collaboration via the African Coalition of Library Consortia.

Colombia **César Pallares** of Consorcio Colombia highlighted Latin America's pioneering transformative agreements with major publishers including Elsevier, Springer, and Taylor & Francis. These agreements have generated substantial cost savings for Colombian institutions while enabling a significant proportion of research output to be published open access under open CC BY licenses. However, currency fluctuation presents a major ongoing challenge, with all exchange rate risks borne entirely by the research community rather than being shared with publishers as contracting parties. Despite these financial uncertainties and, often, challenges related to political instability within the country, the consortium approach provides an overall cost distribution mechanism that helps to ensure fairness between research intensive and smaller institutions.

Finland Arja Tuuliniemi of FinELib presented Finland's mature program featuring 18 transformative agreements with exceptionally strong researcher support—highlighting that these agreements align directly with what scientists want for their research dissemination. Backed by both government policy and enthusiastic researcher engagement, the program has demonstrated remarkable growth in open access publishing from 200 articles in 2017 to over 7,000 in 2024, representing a dramatic shift in the proportion of Finnish research output made openly accessible. Transparency is a key priority in the consortium's negotiations—eschewing non-disclosure clauses and ensuring full agreement texts are openly published.

United States Keith Webster from Carnegie Mellon described the fragmented US landscape lacking national coordination. While thousands of institutions support journals through subscription-based investments, redistribution of investments around open access publishing shift cost-bearing to a relatively small number of research-intensive institutions, creating coordination challenges across the federalized higher education ecosystem. Although transformative agreements have grown substantially across the US—from just 4 in 2022 to over 100 expected in 2024—continued progress will depend on navigating budget constraints and the complexity of the institutional landscape.

The presentations highlighted both the diversity of approaches being taken globally and the potential for increased collaboration, innovative funding models, and policy alignment to support the ongoing transition to open access. Discussions among presenters and delegates underscored shared priorities around financial sustainability, equity, and infrastructure development.

FINANCIAL RESTRUCTURING STRATEGIES

Three presentations examined institutional approaches to financial restructuring supporting openness in scholarship.

Ádám Dér (Max Planck Digital Library) detailed the library's transition from subscription to publication-based payment models aligning financial resources with researcher publishing behaviors. This approach delivered over 90% open access outputs while enabling significant cost reductions and fund reallocation to support diverse open publishing models—a success achieved through implementation of OA2020's Expression of Interest principles.

Niklas Willén (Bibsam Consortium) outlined the Swedish consortium's strategy to promoting open access publishing, driven by a government directive mandating immediate OA for publicly funded research, and the pioneering adoption of transformative agreements. Bibsam's approach has led to significant cost savings and marked increase in open access outputs. Despite challenges, the Swedish consortium remains committed to advancing open access, aiming to cease hybrid journal agreements by 2026. Willén concluded by underscoring the importance of fair pricing models and the Bibsam's ongoing efforts to align institutional costs with publishing output, ensuring sustainable and equitable access to scholarly publications.

Mathew Willmott (California Digital Library) and Celeste Feather (Lyrasis) presented early findings from the OA2020 working group of collections strategists

from around the world conducting data gathering and analytics to understand current financial flows in scholarly publishing. The group is exploring potential scenarios based on publication-based pricing models, examining country-level article output and anonymized financial data to map current cost distribution. Their analysis models different future scenarios, including comprehensive open access publishing aligned with the cOAlition S Fairer Pricing Framework and explore potential future scenarios based solely on publication-based pricing models.

STRATEGIC PLANNING SESSION

The final session focused on developing strategies for advancing open access, emphasizing needs for clear, unified communication and collaboration among global stakeholders.

Artificial intelligence A significant portion of conference discussions centered on the implications of AI for open access publishing. Community members raised concerns about restrictive licensing clauses—often promoted by publishers under the guise of protecting authors from AI exploitation—that in practice constrain legitimate scholarly methods, including text and data mining. Participants emphasized that computational approaches are now foundational to knowledge production and must remain unrestricted.

The discussion brought into sharp focus the critical role of licensing in shaping the academy's future agency. While some expressed uncertainty about the continued appropriateness of CC BY in the AI era, participants broadly agreed that only CC BY provides the necessary legal clarity and freedom for the research community to build, interrogate, and train its own AI models. There was a strong consensus that more restrictive licenses such as CC BY-NC and CC BY-NC-ND not only hinder computational scholarship but continue to cede control of the scholarly record—and the ability to derive new insights from it—to commercial interests. Maintaining a default commitment to CC BY was widely considered as essential to ensuring that the academy can develop its own infrastructures, applications, and models in the public interest.

Transparency expectations Conference delegates consistently identified transparency as their top priority for advancing open access negotiations. Participants called for comprehensive transparency including research information, publication data, pricing structures, administrative fees, multi-year cost trajectories, and quality assurance standards—reflecting principles outlined in the Barcelona Declaration on Open Research Information.

Community members noted ongoing problems with publishers providing different information to different countries and consortia during negotiations, rather than offering transparent ranges of available options. This lack of transparency undermines trust and effective decision-making across the global research community. Delegates emphasized that any meaningful discussion of equity in scholarly publishing must be fundamentally rooted in transparency, as fair and equitable arrangements cannot be achieved without access to complete and consistent information about costs, terms, and conditions.

Research integrity as collective responsibility Discussions emphasized research

integrity as a shared responsibility requiring collaboration among all stakeholders. While publishers have made significant investments in detection technologies and integrity teams, participants emphasized that addressing research misconduct ultimately requires institutional action and systemic reforms to research assessment practices, which many researchers currently experience as pressure to "publish or perish."

The conversation distinguished between different types of integrity issues—honest mistakes, intentional fraud, and organized paper mills—requiring different approaches and responses. Participants called for greater transparency and better collaboration between publishers and institutions to address systematic problems effectively.

Equity and global participation Throughout the conference, speakers highlighted persistent inequities in scholarly publishing that transformative agreements alone cannot address. Participants from countries of the Global South emphasized needs for differentiated pricing, support for local publishing initiatives, and recognition of diverse research contexts and languages.

Participants stressed that achieving true equity in scholarly publishing will require fundamental reform of research assessment systems, which too often prioritize volume and publications in high-impact, often Northern-based journals. This bias disadvantages researchers from resource-limited regions and marginalizes valuable scholarship published in local or regional venues. There was broad agreement that research assessment must evolve to focus on quality and acknowledge the full spectrum of legitimate publishing venues—including local journals—in order to support a more inclusive and representative global research ecosystem. ○

KEY OUTCOMES

COMMUNITY COMMITMENTS

Throughout the conference, delegates made clear commitments to:

Expand negotiations as a means to reallocate institutional investments from subscription-based models to open access publishing, in line with comprehensive investment audits and strategic funding redirection.

Advance diversified open access investment strategies that go beyond negotiations—emphasizing sustainable, community-driven solutions and reducing dependency on traditional commercial publishing models.

Integrate the shared priorities identified at B17—including transparency, equity, and strategic investment—into ongoing dialogue with institutional stakeholders and consortium membership to inform negotiation principles and ensure alignment with institutional values and global open access goals.

Reinforce transparency and accountability by registering all transformative agreements in the ESAC Registry, enabling community benchmarking on agreement terms and promoting open research information to steward the open access transition.

Establish CC BY licensing as the default, while proactively addressing researchers' concerns about AI misuse, to ensure both rights retention and ethical implementation of open licensing standards.

Maintain equity and inclusion as a central focus, ensuring that all open access initiatives—whether local or global—prioritize access, representation, and participation across diverse research communities.

Embed open science principles and open research information systems into negotiation strategies and institutional workflows to support integrated, transparent, and collaborative research environments.

Uphold publication ethics and research integrity by promoting responsible editorial practices, safeguarding against predatory behaviors, and ensuring that open access advances are grounded in trust, quality, and academic rigor.

Support coordinated reform of research assessment systems, working with funders and institutional leadership to dismantle incentive structures that hinder open dissemination and academic diversity.

PUBLISHER ENGAGEMENT

The conference demonstrated the value of continued dialogue between the research community and publishers. Publisher representatives acknowledged various community concerns and expressed willingness to collaborate on transparency initiatives, research integrity challenges, and equity improvements. Several publishers noted their significant investments in research integrity

infrastructure and technology, while also recognizing the need for better communication and coordination with institutional partners in addressing systemic challenges.

Importantly, participants acknowledged that some publishers have responded to the B16 Final Statement with initial improvements—such as piloting differentiated pricing models and making concrete adjustments their License to Publish agreements. While these efforts remain modest in scale, they signal a shift in engagement and a growing awareness of the need for change. As the transition to open access continues to evolve, B18 will serve as a critical moment to assess the progress made and renew commitments to shared goals.

B17 FINAL STATEMENT

The conference produced a comprehensive Final Statement representing strong consensus among all delegations, setting forth four key objectives for the next phase of publisher negotiations:

1 Academy control Ensuring pathways to open access support academy control over research literature through author copyright retention and CC BY licensing.

2 Academic use of computational research methods Prioritizing immediate open access under CC BY licensing to enable full computational reuse while preserving scholarly control and leveling the playing field with big tech.

3 Transparency Calling for full visibility into publication data, ethics standards, and pricing to enable equitable assessment and accountability.

4 Fair investment realignment Ensuring financial resources support inclusive and sustainable scholarly communication rather than disproportionately feeding profit margins.
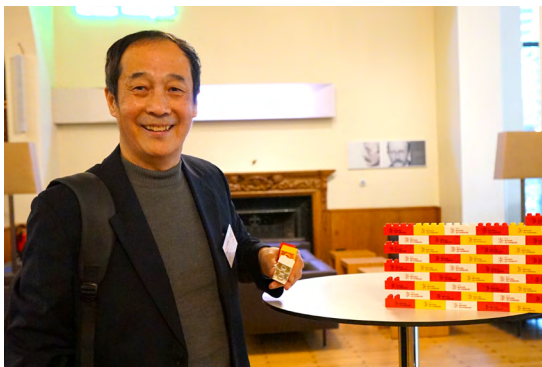
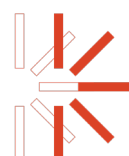The B17 Final Statement is available in full here. º

The conference concluded with delegates invited to take bricks from a constructed paywall, serving as symbolic reminders of collective commitment to dismantling barriers in scholarly publishing and the ongoing mission of keeping open access moving forward.

LOOKING
FORWARD

B17 demonstrated the research community's readiness to take next steps in shaping open access transformation. With over 50% of global research articles now openly accessible, the foundation exists for completing the transition while ensuring it serves principles of equity, transparency, and academic self-governance.

The conference reinforced that open access is not merely about article availability but about fundamental questions of who controls scholarly communication and how research benefits society. Openness and transparency are essential not only for enabling broad access but also for fostering trust in the quality and integrity of science itself. The path forward requires continued collaboration, strategic investment thinking, and an unwavering commitment to the public good that drives the open access movement.

Key challenges for the coming year include enhancing transparency from all stakeholders, addressing persistent global inequities, and reforming policies and practices that create incentives for quantity at the expense of publication quality. Amid escalating geopolitical tensions and a growing erosion of public trust in science—both potential threats to the open access movement—it is imperative that the OA2020 community stays united and resolute in advancing full open access.

In response, the OA2020 community will focus on promoting transparency in agreements and investments, developing shared financial benchmarking frameworks, centering equity by supporting diverse publishing platforms, promoting CC BY through licensing to empower researchers—especially regarding AI—and advancing open research principles into negotiations and strategies.

The community remains committed to providing resources, coordination, and support needed to complete this historic transformation of scholarly communication. ●

4 February PRE-CONFERENCES

OA2020 SUMMIT OF CHIEF NEGOTIATORS

GUIDING PERSPECTIVES ON OPEN ACCESS NEGOTIATONS:
An orientation for delegates

Docents
Ádám Dér, Max Planck Digital Library, Germany
Mathew Willmott, California Digital Library, USA

5 February DAY 1

WELCOME AND OPENING REMARKS

OA2020 welcome and opening remarks
Colleen Campbell, OA2020 Initiative, Max Planck Digital Library, Germany [address]

Max Planck Society welcome
Richard McElreath, Max Planck Institute for Evolutionary Anthropology, Max Planck Society Presidential Advisor on Open Science, Germany

Conference co-Chair opening remarks
Ulrich Pöschl, Max Planck Institute for Chemistry, Germany [address]
Gerard Meijer, Fritz Haber Institute of the Max Planck Society, Germany

DELIVERING ON THE PROMISE OF OPEN ACCESS:
Enabling author rights

Moderation
Rich Schneider, University of California, USA [slides]

Panelists
Chris Bennett, Cambridge University Press
Victoria Eva, Elsevier
Guido Herrmann, Wiley
Steven Inchcoombe, Springer Nature
Ellie Souster, Taylor & Francis

BREAKING DOWN PAYWALLS:
Fair and equitable terms for open access publishing

Moderation
Alicia Kowaltowski, Instituto de Química, Universidade de São Paulo, Brazil
Ellen Tise, Stellenboch University, South Africa

Panelists
Rod Cookson, The Royal Society
Gemma Hersh, Elsevier
Malavika Legge, OASPA
Abel Packer, SciELO [slides]
Sarah Tegen, American Chemical Society

UNPACKING TENSIONS IN THE OPEN ACCESS TRANSITION:
Speed, growth, and publication ethics

Moderation
Curtis Brundy, Iowa State University, USA
Susan Reilly, Irish Research E-Library (IReL), Ireland

Panelists
Adam Day, Clear Skies
Chris Graf, Springer Nature
Miriam Maus, IOP Publishing
Bernd Pulverer, EMBO Press
Michael Streeter, Wiley

FROM TRANSFORMATION TO COLLECTIVE RESPONSIBILITY:
A conversation among actors engaged in the OA transition

Kumsal Bayazit, Elsevier
Liz Ferguson, Wiley
Kazuhiro Hayashi, National Institute of Science and Technology Policy, Japan
Brigitte Kromp, University of Vienna, Austria
Carolyn Honour, Springer Nature
Günter Waibel, University of California / California Digital Library, USA

FROM TRANSFORMATION TO COLLECTIVE RESPONSIBILITY:
Community reflections

6 February DAY 2

REGIONAL PERSPECTIVES ON THE CURRENT STATE IN THE OA TRANSITION

Deepali Kuberkar, Tata Memorial Hospital, Department of Atomic Energy, India [slides]
Xiwen Liu, National Science Library, Chinese Academy of Sciences, China [slides]
Arnold Mwanzu, Kenya Libraries and Information Services Consortium (KLISC), and Aga Kahn University, Kenya [slides]
César Pallares, Consortia Colombia [slides]
Arja Tuuliniemi, FinELib Consortium, The Finnish National Library, Finland [slides]
Keith Webster, Carnegie Mellon University, USA [slides]

FINANCIAL FLOWS AND COST SCENARIOS FOR AN OPEN FUTURE

Max Planck Digital Library case study
Ádám Dér, Max Planck Digital Library, Germany [slides]

Bibsam Consortium case study
Niklas Willén, Bibsam, Sweden [slides]

OA2020 Working Group case study
Celeste Feather, Lyrasis, USA
Mathew Willmott, California Digital Library, USA [slides]

PRINCIPLES AND PRIORITIES TO MOVE OA FORWARD
Strategy session

7 February POST-CONFERENCE

ENGAGEMENT AND COMMUNICATION STRATEGIES FOR GREATER IMPACT ○

Advancing Open Access in Japan: Policy Framework and Strategies
Saeko Aketani
The University of Tokyo

The Panorama of Xiamen University Libraries' OA Transformation — Research, Actions, and the Future under Collective Responsibility
Juan Chen, Yuehua Lin, He Chen, Xue Li, Xiaoting Gong
Xiamen University Libraries

Open Access Transformation at Shanghai Jiao Tong University
Jinhua Cheng
Shanghai Jiao Tong University Library

From Subscriptions to Solutions: CAUL's Open Access Roadmap
Angus Cook
Council of Australian University Librarians (CAUL)

National Science and Technology Library
Ying Cui, Kunhua Zhao, Xin Li
National Science and Technology Library (NSTL)

Open Science Support Initiative (OS2I) at the Tsinghua University
Tianfang Dou
Tsinghua University Library

Can standalone institutions sustain financially by moving towards transformative agreements?
Santhosh Krishnan Venkata
Manipal Academy of Higher Education (MAHE)

One DAE One Subscription (ODOS): Revolutionizing Open Access Research
Deepali Kuberkar
Tata Memorial Hospital, Department of Atomic Energy, India

Taiwan Open Access Journal (TOAJ)
Wen Yau Cathy Lin
Department of Information and Library Science, Tamkang University
Mengling Beatrice Lin and Chia Yu Lin
Science & Technology Policy Research and Information Center, NARLabs

Transformative Agreements in Progress: A Collective Singaporean Effort
Kooi Cheng Ooi
Singapore Management University

OA Policy in Japan and JUSTICE
Kayo Sakemi, Yasuko Shibata
JUSTICE

Methodology and tool, based on open metadata, to detect publications covered in TAs
Jeroen Sondervan
Dutch Research Council (NWO) / Open Science NL

Open Access Practices of NSLC
Shibo Yu, Kunhua Zhao, Xin Li, Jingyu Liu
National Science Library, Chinese Academy of Sciences

B17 brought together over 150 representatives from academic and research institutions, national negotiation teams, and research funding organizations spanning more than 40 countries and all continents. The following statement represents the strong consensus of all delegations present at the meeting.

The global transition to open access publishing continues to evolve, with research communities worldwide making steady progress in converting subscription-based financial streams into support for open access and empowering their authors to choose a CC license for their journal articles. Our efforts encompass both ongoing publisher negotiations and the commitment to supporting new and improved forms of open access publishing, in line with the OA2020 Expression of Interest, nurturing community-driven initiatives and scholarly publishing in local languages and contexts relevant to specific research communities.

As open access publishing grows, concerns about sustainability inevitably arise, particularly as the volume of research outputs expands, driven by complex factors both within and outside the academy. To ensure this growth is a positive force for the advancement of scholarship, our efforts remain steadfastly focused on sustainable models that preserve the integrity and accessibility of scholarly communication.

Building on the groundwork laid by earlier transformative agreements, and recognizing the expanding role of librarians as both stewards of knowledge and essential partners in empowering authors to openly share their research, we are committed to continuously refining open access models and strengthening negotiation objectives to ensure agreements evolve in line with the academy's priorities. As this transformation continues, our community will work with publishers to meet the diverse needs of the global research ecosystem, with a continued focus on the key priorities outlined in the B16 Final Statement: tackling inequities, ensuring academic self-governance, and upholding author rights.

Reaffirming those priorities and expanding our focus, we set forth the following objectives to guide the next phase of publisher negotiations toward an open scholarly communication paradigm.

1 Academy control: All pathways to open access make valuable contributions towards ensuring the progress of scholarship, impact for society and **academy control over the research literature**. We reaffirm that on the pathway of publisher-provided, journal-based scholarly publishing, returning control to the academy means an open publication to which an **author retains copyright**, accompanied by a **CC BY license** that allows the academy and the public to most fully benefit from the research. 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: Computational research methodologies, such as text and data mining (TDM) and artificial intelligence (AI), are **integral to modern scholarship**. It is **scholars, not publishers**, who should determine which methodologies best advance their ability to investigate, analyze, and generate new knowledge. 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** rather than relinquishing control to commercial entities.

3 Transparency: A rapid transition to open access requires that all stakeholders have full visibility into the data necessary to steward this shift and prepare for a future where financial flows equitably support the needs of authors and the research community. We call on publishers to collaborate with the research community to enable the **full opening of research information**, as described in the Barcelona Declaration. Only with full transparency around **publication data, publication ethics and quality assurance standards, and pricing**—including information on waivers, discounts, and the impacts of geopricing—can the global research community assess

progress, ensure accountability, and cultivate a fair and sustainable open scholarly publishing ecosystem.

4 Fair investment realignment: We have made significant strides in dismantling the mechanisms that allow publishers to profit multiple times on the same journal content—through opaque subscription pricing, additive payments by libraries and authors (subscriptions and uncontrolled hybrid APCs), and the exploitation of exclusive copyright—but the transition to open access publishing must go further to guarantee that financial resources are directed toward fostering an inclusive and sustainable scholarly communication ecosystem, rather than disproportionately feeding publisher profit margins. Our ultimate goal is to **ensure that financial barriers never determine who can publish** and that investments in scholarly publishing are **fair, transparent, and structured to sustain an open and inclusive publishing environment**. As institutions shift their financial commitments from subscriptions to open access, publishers must adapt their pricing structures accordingly. In many cases, this means **reducing historical revenue levels** to achieve a fairer distribution of publishing costs. At the same time, institutions with high research output must have the confidence that their **investments reflect the true cost of responsible open access publishing**—grounded in transparency and inclusivity rather than entrenched profit expectations. ●

B17 **MOVING OA FORWARD**