MOVING OA FORWARD

F O C U S S E S S I O N S

Introducing ESAC Registry 2.0: expanded scope, greater detail, and enhanced accessibility

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Colleen Campbell (OA2020 Initiative)

00:00:03:23   Great. Welcome, everyone. Thank you for joining us for this next edition of the Moving Forward Focus session. Today we are really excited to be presenting work on the ESAC Registry, which I think most of you know about. But today we're going to hear more in detail about the registry itself and some of the enhancements that have been made to it.

00:00:31:08   I'm Colleen Campbell, if you don't know me, from the Max Planck Digital Library, and I coordinate the OA2020 and ESAC initiatives together with my colleagues: Ana Valente, who is in the background here, and others. We coordinate this initiative, ESAC, which is really a global community of practice, and the registry and the other tools on the ESAC website have come to be a shared infrastructure built by and for libraries, consortia and negotiators working to advance open access publishing.

00:01:07:12   Just a little background as we start: ESAC was born more than ten years ago—I think, now—out of a need, really, to bring more transparency and shared understanding to a rapidly changing publishing landscape. We needed more transparency and sharing of good practice around workflows and processes and contract terms and negotiations. And one of the core community tools is, in fact, the ESAC Registry, which is where libraries and consortia openly share information about the agreements they sign, to help their peers track the market developments and learn from each other.

00:01:57:03   Today, as you might realize, around half of new research articles with the major international publishers are published open access, and the registry has evolved alongside that, that market shift. It's recently been expanded and redesigned by our practitioner community to reflect the new kinds of agreements and new questions that are emerging around transparency. So this is why we are having a session today.

00:02:27:15   A working group was established some months ago, and I'm pleased to introduce Jack Hyland, who is the manager of I wrote the Irish Research e-Library Consortium and he is the lead of a working group, specifically a work package dedicated to the ESAC Registry,

and in this working group, he recently guided a series of community driven updates and enhancements to the registry.

00:02:59:04   So today, Jack, we're really happy to have you here to walk us through the ESAC Registry 2.0 and show us the new ways that it will help us learn about what's happening and improve our negotiation capacity across this global community.

So, Jack, let me turn things over to you.

Jack Hyland (IReL)

00:03:25:03   Great. Thank you. And good morning, everyone. I'll just start sharing my screen. Okay. So, let's start with the basics, for anyone who's relatively new to the ESAC Registry. So, the ESAC Registry is part of the wider ESAC website and initiative, and it's designed to share information about OA publishing agreements with the community. It's open, community-led, and deals are submitted by institutions, by libraries and by consortia.

00:04:15:15   And as Colleen noted, it's coordinated by the Max Planck Digital Library. And the registry's goals are to increase transparency internationally and globally in terms of the cost, the financial flows, the terms and conditions, and the general workings of these OA agreements. And it allows institutions to compare and swap notes, globally, on all of this information about the agreements. And also longitudinally over time, it allows us to get snapshots, year-on-year, of the progress towards OA as a business model, and the practices as the terms and conditions have evolved with these deals.

00:05:01:20   So the registry was launched in 2019. It contains some older OA agreements going back to 2016. I think, today it has over 1500 agreements, going across more than 72 countries globally. In 2025 it registered 256 agreements. That's about standard year-on-year in recent years. And so far in 2026, we have 45 agreements in, so far.

00:05:36:20   I'm hoping that this will kind of jump up quickly, once people start exploring the new enhanced registry. So, to point out the reasons and thinking behind this refresh of the registry, some of the limitations that have kind of accumulated over time with the original registry is that, back in 2019, it wasn't designed to accommodate this number of agreements.

00:06:08:13   So it's become a little bit unwieldy, with over 1500 records in there. There's the ability to download the entire registry dataset in Excel, but not all of the fields are included in that by default. So that needed to be rethought. Something that the community kind of repeatedly requested is that it takes a little bit of work to, say, explore by a particular publisher and just filter down to agreements where the full text of the agreement is available, the full contract.

00:06:41:14   And because the registry is an accumulation of older and current deals, it takes a little bit of work as well to just find the current deals. We had lots of feedback, as well, saying that the submission form with the 20 or so questions, some of the phrasing there was unclear to people, or some of the language there needed a bit of a refresh, a rethink.

00:07:06:13	And also, a really important one is that, what was explicitly up to last week, it was restricted to transformative agreements. But we all know that transformative agreements aren't designed to last forever. I'll come back to that. And also, we had a discussion as well about, by definition, uploads to the registry are voluntary. So, it doesn't capture all OA publishing agreements. And there's pros and cons of that, that we discussed a lot. And again, that's something I'll come back to.
00:07:41:07	So, as Colleen pointed out, the ESAC website is managed by the ESAC Team: Colleen, Ádám and Ana, in Max Planck Digital Library. And the background to the working group is that following the last Berlin OA Conference and the actions and outcomes of that, it was decided to put together a working group to enhance ESAC. And me, Nicola Bieg and Jens Aasheim were invited to co-chair this working group.
00:08:15:14	And after several meetings between the working group and between the ESAC team, we arrived at an action plan where we split the work up between the three of us into three work packages. So, the first one that we've completed so far is the enhancements to the ESAC Registry, which is very much at the center of the ESAC website.
00:08:35:10	And then Nicola volunteered to enhance and kind of refresh the ESAC support material: so, all of the guides and checklists, things like that, about entering OA publishing agreements. Work on that is what will take place next. And also Jens is working on recommendations for title lists for OA eligible titles under agreements to be standardized and shared with publishers and across the community.
00:09:12:21	So we started off the working group with a survey of the global OA2020 community, which went out last summer, and we attracted responses mostly from libraries and consortia, but also from publishers. And based on the responses of this, we did a first draft of actions needed on the registry and on the ESAC resources and the key things that came out repeatedly in the responses was that they wanted better searching and filtering to find agreements.
00:09:47:13	They wanted to be able to download the registry in full. Like I noted earlier, they wanted to have better visibility of when the full text of agreements are available. And also, there was a lot of suggestions on a rethink of the kind of forms and fields and language we use in the registry submission form.
00:10:08:10	So following this, we came up with a rapid, a relatively rapid, plan for this. We had a kickoff meeting in October, and we agreed that what was wanted by the community and what was, you know, viable in the in terms of the timeline of this working group, was that we wanted a refresh of the registry.
00:10:32:13	It's greatly valued by the international community. And we threw around lots of ideas about how we could radically reinvent the registry. A little bit more on that later. But what was needed was, you know, it's valued, right here, right now, and it will be in the coming years. So we wanted an improvements, not anything radically new and not starting from scratch.
00:10:54:22	So, I broke this into several strands within this work package. First of all, we started off with a review of the scope of the registry. If it's not just for transformative agreements,

what should we include? What shouldn't we include? Next, the biggest, the most labor-intensive one was looking at the submission form, looking at all the questions there.

00:11:21:03   See what questions we want to remove, what ones we want to add in, what ones we want to rephrase. And then once we had that ironed down, we moved into looking at the design and functionality of the website. What kind of searching and filtering we wanted, things like that, and came up with a design brief for Ana Valente, who then in December and January did the implementation, made all of those changes to the submission form, to the website.

00:11:53:08   We followed this then by a couple of weeks of picking the cards, checking if everything was working, making any final tweaks to it. And that brings us up to days to the launch, which happened yesterday. The enhanced registry is now available, and I'll be taking a look at that later. So first, we agreed that we wanted to move beyond just transformative agreements.

00:12:21:03   The reason for that being that, since transformative agreements started, it was always recognized that these are transitional. They're not designed to last forever. And what we're seeing on the ground at the moment is that publishers and consortia are beginning to move away from transformative agreements, move on to the next stage. So, Bibsam in Sweden have kind of concrete plans to move to pure publishing deals in the next couple of years.

00:12:48:18   And we're seeing publishers like Cambridge University Press and ACM, well on the way or either fully transitioned to being fully open access publishers. So, we wanted the registry to be compatible with this and also be compatible in the coming years as new business models are established and evolve. So, the basic definition that we have on top of the submission form is that we welcome any agreements, any submission, from an institution on an agreement between the institution and the publisher, which includes provision for OA publishing.

00:13:28:14   So that would continue to include transformative agreements, but also things like pure publishing deals and all variations of read and publish, publish and read, etc. So, in other words, if there's language in your contract which commits to OA publishing and there's terms and conditions for that, it's suitable for the registry.

00:13:58:14   Next—like I said, this was a big job—we took a look at all of the questions in the registry submission form, and we got a lot of response, of feedback from the wider community and from the working group on people's ideas and suggestions for this, and often widely divergent. Some people wanted lots more questions.

00:14:19:09   Some people wanted it simpler and having less questions. So, there was a lot of work in trying to find a balance there. So, these agreements can have a lot of moving parts, and we wanted to find the right balance of things, data points, things we're going to be asking about that are of wide interest to the international community.

00:14:41:17   Something that wouldn't make completing the submission form too onerous for whoever submitting. And we can't ask about everything to do with an agreement— you'd have 100 plus questions otherwise. So, we were kind of trying to whittle it down

to the most important ones. And what we found as well in our discussions was that some questions are quite complex and nuanced, and really not suitable for binary questions, or tick boxes, or radio buttons in a web submission form.

00:15:18:04   So things like questions about authors' licenses to publish, we've added details on that, but we don't expect people to give comprehensive, really detailed answers on that. I suppose there's some areas in which you're better off just downloading the PDF of the full agreement and reading that for yourself rather than trying to have everything structured in the ESAC records.

00:15:46:24   And also what was important was that we didn't want a divergence between Registry v1 and Registry v2. We wanted to keep it all compatible, so that those 1500 records and the new records going forward would all kind of sit well together.

00:16:07:15   And the outcome of this review of the submission form and all its language was that we rephrased the number of existing questions, taking care to keep the intent of the question the same, so it's backward compatible. We've added several new questions. Previously, you were just asked, what's your level of publishing output with the publisher?

00:16:32:22   But now we go into more detail asking what's exactly included in the agreement. So, is it a capped agreement? Is it uncapped? Things like that. So, you can easily compare, say, what's a consortium's total output with a publisher and how much is included in the agreement. Some more questions on the nuts and bolts of the agreement: how workflows are managed, how annual reporting on the agreements and how the workflow is managed, and also questions on authors' rights.

00:17:01:09   So we already had a question in there on the Creative Commons licenses, but now we ask also about the licenses to publish that all authors are asked to sign when they are publishing under the agreements. So yeah, the form is now a bit longer. I think, depending on how you count, it's about 35 questions, but I think only about 15 or 20 of these are mandatory.

00:17:22:16   So, submitters have flexibility, they can pick and choose about which ones they choose to respond to. Okay. So, now let's take a look at the registry. Okay, I'll just stop sharing for a moment.

00:18:05:0   So, this is the new registry homepage. It's looking great, much fresher. Big thanks to Ana again for her work on this. So, what we can see, first of all, is you've got these new filter tools up on top. So, say, if you're specifically interested in AIP, you can filter there and just look at AIP deals.

00:18:31:18   If you want currently active deals only, you can filter by that. And ones where the contract is linked to you from ESAC, well you can get that, but there's nothing there moment [for AIP]. And also, there's nice tools that allow you to filter by or to sort by start and end date, so you can see the newest ones first. And then to go into an agreement, you just click anywhere on the row, and that will take you to it.

00:19:08:10   And then you've got the results per record appearing much the same as before. Actually, one thing I will show you quickly is that all of the records here are for transformative agreements, but I took the liberty, as part of testing, to include the registry's first ever pure publishing deal record. So, this is a record for IReL consortium's PLOS deal for 2026.

00:19:41:07   Linking to the full text of the agreement and providing information on that there, using the new fields, which at a glance, it all looks the same.

00:19:53:19   And now to take a quick look at the submission form. You've got the preamble here, which, as I noted earlier, explains what's suitable to include in the agreement. Again, not just transformative agreements: other types of OA publishing agreements too.

00:20:19:05   And then the design of this, the look and feel of it has changed a little bit. It's split into more easy to scan headings like cost-, publishing-related terms, read access-related terms where relevant; that won't be relevant for pure publishing deals. More detail on the OA workflow. Things that are important to us in the community like, are articles accepted by submission date or acceptance dates?

00:20:52:23   What kind of dashboard the publisher is using, if they're using one? And then further detail below, the Creative Commons licenses, licenses to publish, things like that. And continuing to keep a free text field down at the bottom, for voluntary comments on the success of the deal, how satisfied were you with the negotiation process, things like that.

00:21:19:19   And that's all optional, as before. Again, it continues to include connections with the cOAlition S Journal Checker [Tool]—another good reason to submit to the registry is that the data from your submission feeds into the Journal Checker Tool, which will be used by researchers on the ground when they're looking for journals to submit to.

00:21:44:13   And also noting that the download of the registry to an Excel format has now been enhanced. So, all fields will be included in this when you download the whole thing to yourself for doing any kind of further work analysis on it. Oh, and also to note, the matrix view of the registry, that was there beforehand, but it's a bit more visible now the way it's presented.

00:22:11:01   So, you can see a snapshot here of the agreements registered, kind of an image of the registry, by publisher, by country. And you can see the evolution over time, going from a very small number of offsetting agreements and then widening to include more publishers, to include more countries year on year.

00:22:37:13   Okay, I'll stop sharing my browser and go back to sharing PowerPoint. And a few points now on the future of OA transparency. Well, we have the registry enhanced now, but I suppose this isn't the end of the story. And we talked a lot about this in the working group and with the ESAC team about different ways the OA transparency could go in the future, and the model we decided to stick with was a registry based on manual uploads and voluntary submissions by institution.

00:23:29:04   The registry isn't a comprehensive record of every transformative agreement or every OA publishing agreement. So, for example, the Cambridge University Press have hundreds of such deals, but you might find a dozen or so in the registry, only. And we were talking about ways that you might capture the entirety of what's out there, but really, we decided that would be of limited use to the negotiators on the ground.

00:23:59:22   Because so long as you get a snapshot of selected agreements, that's usually enough, rather than trying to capture everything. And I suppose the virtue of these manual submissions to the registry is that it's human. It gives a subjective negotiators' perspective on a deal. So, I've been doing a lot of work using the registry, as an end user, over the last few weeks and preparing for my upcoming negotiations with publishers later in the year.

00:24:31:23   And it's kind of one of the more enjoyable parts of my work, being able to see what's out there, as a nosy neighbor, seeing who's got great deals, who's got only okay deals and also getting snapshots into, I suppose, how, you know, kind of human and messy the whole negotiation process is.

00:25:05:10   I think, reading between the lines, you can see in the end results some clauses that are being very well drafted, and ones that I didn't think of but I make a note to think about that the next time. But, also you get little snapshots of human fallibility and the messiness of negotiation work and the way things go missing, things get forgotten about. So sometimes you'll see evidence of clauses, things that were maybe rushed or things that kind of get lost in the confusion of incomplete sentences or mistakes in the financial details.

00:25:34:15   And I suppose it's encouraging to us humans to be able to see that nobody's perfect, and we all live in the real world where things are messy and things are complex. So, I find that personally valuable to have that. And also with a registry, it's not throwing everything out there.

00:25:53:10   It's not a firehose. It gives negotiators and consortia and institutions flexibility about what they choose to include and what not to include. So sometimes you might tactically be ambiguous or hold back on some information, and other times, say, if you're new to submitting to the registry, there might simply be questions that you're not clear on, or things you didn't think of in negotiations but you might choose to include next time.

00:26:21:15   So it's designed to include that level of flexibility to allow people to customize what they can and can't share. But so, I think this was very much a strong need for the registry to continue as is, using this model, but it could be superseded in the coming years with other initiatives.

00:26:44:15   I'm thinking of things like the OA2020 working group, working in parallel to us, looking about how to have further transparency in the transition OA, and also the recent NISO working group on business processes. And to summarize it very quickly, they're both looking at different ways to make OA publishing information, OA publishing deal information open by default and open at source, making things comprehensively open and machine-readable and fair.

00:27:25:01   Our working group had discussed this, but we decided that it was too big a job for us to take on at this time. So, we really wanted something to help the community in the short term to keep things running. Well, we might find that the registry in the coming years, maybe in the next five years is superseded by making deals open and machine-readable by default, but we're not there yet.

00:27:58:08   And almost there, I'm in the last couple of slides. These are the names of all of the people who volunteered for the ESAC Resources Working Group. So, a big shout out and a thank you to them. It's been really a great pleasure to work with these people globally, and get feedback and good ideas and insights from these other practitioners on the ground, the kind of thing they're interested, their productive and constructive, advice about what would work and what wouldn't work and what would make sense to people using the registry.

00:29:00:13   So, thank you very much to all of them. And yeah, just kind of by the by to note that our working practices were all relatively low tech. So, we were preparing or briefing documents in shared Google documents and then throwing them out to the working group out of their own reviews, markup, comments, things like that.

00:28:57:15   And that's how we communicated asynchronously across different time zones, and for the task at hand, that worked perfectly fine.

00:29:10:12   And finally, a reminder to everyone out there to submit to the registry. And again, the registry, is open to any library or consortium with publisher agreements that include provision for OA publishing. So, if you hadn't submitted to the registry yet—I think probably most of you have—you're welcome to do so. As a lot of you know, submitting to the registry is relatively easy.

00:29:38:04   Takes me around ten minutes per agreement to upload. And again, minimal submissions are welcome. If you don't understand all the questions or if there's issues that you haven't addressed, feel free to skip many of them. And there might be information that you don't have at hand or that you're not comfortable releasing or that you're not clear on; don't worry about things like that.

00:30:02:13   It's very valuable to submit, to promote your deals and to contribute to the community, and also to make sure to make connections and to be more visible to peers and potential partners and colleagues out there in the community. And a note that there is a safeguard on this, that when you submit, your submissions will be reviewed by ESAC, by Ana, before publication.

00:30:31:17   So there is a safeguard there. Okay. So, I'll stop sharing. That's my presentation finished.

Colleen Campbell

00:30:39:07   Fantastic. Thank you, thank you, Jack. Thank you. I'm going to come back to you, but while we are here, I wanted to take the opportunity; you were showing who should contribute and why you should contribute to the ESAC Registry, and I wanted to share another perspective.

00:30:57:00 I've got on the call Ádám, our colleague Ádám Dér, who is responsible for the visualizations of the ESAC Market Watch, which connects to the registry. So, I thought before we conclude this presentation piece, I go directly to Ádám and ask him if he could show us how the two are connected. Ádám, are you here?

Ádám Dér (Max Planck Digital Library)

00:31:17:07 I'm here. Thank you.

Colleen Campbell

00:31:18:09 There you are. Okay. Good to see you.

Ádám Dér

00:31:23:01 Good morning. Yes, sure. Absolutely. I can go on and before I do it, let me say also from my side, also representing the Max Planck Digital Library, big thanks to everyone who contributed to the working group, Jack as chair and also everyone who responded to the survey and gave then dedicated their time to do this.

00:31:46:13 It's really great to see that a tool that is as old as the ESAC Registry is still being used and it's valued by the community and is being enhanced, and taking next steps in its evolution; that is fantastic to see.

00:32:10:15 Jack, you also mentioned how you are personally using the ESAC Registry, and also that you are looking into the specific agreements and checking the individual terms that can be then used for your own negotiations and your own context. And this is what we have seen as the ESAC Registry grew at the beginning, around 2020, 2021, lots and lots of content has been in there.

00:32:44:07 And we already felt it's such a great source of representing the transition to open access, and it's also useful to contextualize all the data. So, what does it mean, what does the totality of the agreements in the registry mean for the open access transition? What does it mean for commercial portfolios?

00:33:07:09 What does it mean for individual countries and consortia? And this is how the Market Watch came to be. I am sure that all of you are familiar with the ESAC website and the ESAC Market Watch. So, just very, very briefly: what we are doing is we're taking the data from the registry and trying to compare it with the publishing output of the countries or consortia and publishers.

00:33:36:09 Some of the graphics—and I take full responsibility for that—they were updated not so recently as I would like to, but it's on my to do list to continue doing. So, what you can see here is market shares of publishers that you can filter for on the publisher view or the country view.

00:34:02:13	So in which country, which publisher makes up what share of the of the publishing output. You can very much observe the, I don't know, is it the Pareto Principle that usually 20% publishers make up 75-80% of the publishing output given country. And, if you scroll down, how the ESAC Registry grew.
00:34:34:23	Which countries make up which percentage and how many articles in transformative agreements and what impact they have in terms of size and output. There are views where you can look at the individual publishers, where they have agreements and with which consortium and which institution and what kind of sizes these agreements are. And, what I have seen in many contexts, these pie charts on the individual countries based on the coverage, what is covered by transformative agreements, what is covered by fully open access agreements, that countries are very actively reusing these.
00:35:17:18	And I've seen annual reports, for example, also from the Irish consortium, Jack, that showcase these sorts of visualizations. And it's very nice and very fulfilling to see that our works in the Market Watch has that sort of impact. The matrix, for example, that you've shown, Jack, already, this is also something where we were always actively thinking about how can we make it. The registry has now more like, more than 1000, almost 1500, correct me if I'm wrong, lots and lots of agreements.
00:35:57:09	And if you are filtering, if you are trying to interact with those, it's good for human consumption, but I personally always find visualizations much easier to consume and, again, to contextualize things. And this where I already have a couple of ideas for the future of the Market Watch, or enhancements to the Market Watch.
00:36:23:14	The working group can also think about that. But with the enhancements in the ESAC Registry and the more detailed questions, for example, on the conditions in CC licenses, in author rights, and caps (capped/uncapped), I can already see how those sorts of data points can flow into Market Watch, that it's not just comparing or contextualizing publishing output, but also showing the evolution of the terms, as our negotiations also evolve.
00:37:03:21	So, and, I don't know, spoiler alert for the future enhancements in the Market Watch.

Colleen Campbell

00:37:11:16	Thanks, Ádám. Thank you.
	Okay. With that, I just want to thank you and thank Jack, especially for your presentation now, for introducing the enhancements to us all. And thank you especially for your leadership in corralling this amazing community and the volunteers who contributed their time and really careful thought on what would be useful for the community, what can give us more transparency, better understanding of how we can really influence the market through our negotiations, and improve conditions for open access publishing, for our authors, for our communities.
00:37:52:23	So thank you, Jack, on behalf of everyone here. Thank you, working group. Thank you, Ádám also, for showing how contributing to the registry is not only providing the details

of agreements individually, but giving us a broader picture of how things are evolving, which can be useful in conversations with stakeholders, and beyond.

So, yes, thank you all very much.

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