

Scholarly Publishing: Trends for Constructive Growth



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Introduction and Survey Demographics

Welcome to this report on Scholarly Communications: Trends for Constructive Growth, by Research Information

With a long history of involvement in the scholarly publishing industry, Research Information has observed the stresses within the industry as well as the potential growth opportunities.

Through discussion with industry colleagues the idea emerged to gather direct views from academia and supporting industry participants to help understand the challenges to growth in the sector, and more importantly to enable constructive discussion around how to stimulate engagement, reduce barriers, and collectively move the industry forward.

Background

Gathering views and opinions via a neutral methodology meant it was possible to establish a benchmark on the current state of collaboration and interaction within the scholarly publishing industry.

To this end, Research Information designed a straightforward online survey that industry participants could complete anonymously, and so gather views and insight that would be harder to collect in a more open discussion.

The survey was aimed at those working broadly in 'academia', and those working broadly in the 'academic services industry', with the ultimate objective of stimulating further discussion of key issues on the basis of an informed set of data. To this end, one of the main outputs is intended to be 'constructive topics for future industry conversation'.



The survey was aimed at those working broadly in 'academia', and those working broadly in the 'academic services industry'

Survey Scope and Sample

The survey was built around three broad but connected topics, with essentially the same questions asked of respondents from academia, and the academic services industry:



Responding to Today's Challenges

- Individual readiness to respond to new issues
- Organisational readiness to respond to new issues
- The challenge of artificial intelligence



Power and Influence

- Where does power lie in publishing today?
- Who is best placed to make constructive changes?



Institutional Relationships

- Where do relationships break down?
- What limits better collaboration?
- How to improve relationships

Questions were a mix of quantitative and qualitative formats:

- Quantitative questions formats used:
 - a simple yes / no
 - select an answer from a list of options
 - an annotated scale (such as very important, somewhat important, not at all important)
 - or a numeric scale (such as a 1 to 10 scale where 1 = not at all important, and 10 = extremely important)
- Qualitative questions invited respondents to write a comment or add their own viewpoint.

Our total survey sample of 306 respondents were drawn from a range of industry roles spanning most sections of the scholarly communications ecosystem.

Main Respondent Role

We also asked all respondents to select whether they would be answering the survey from the perspective of academia, or academic services industry. This split forms the basis for much of our analysis.

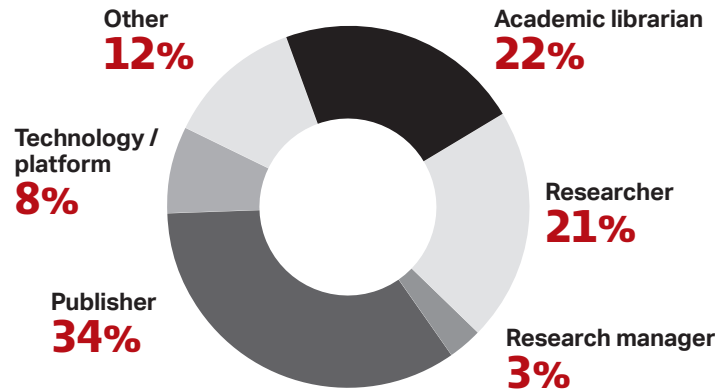
Supporting
academia
(publishing,
platforms,
services)
54%



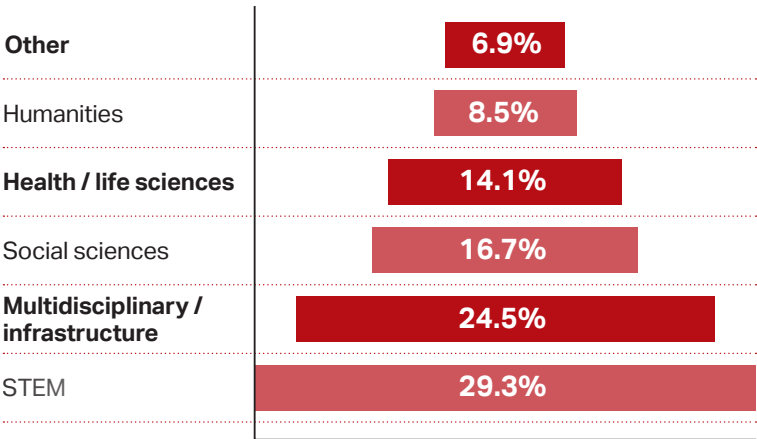
Working
within
academia
(libraries,
research,
teaching)
46%

Perspective when Answering Survey

We also gathered sample demographics on the primary academic discipline that respondents work in, as well as their primary geographic location. This ensured that we gathered views from a sound cross-section of the industry.



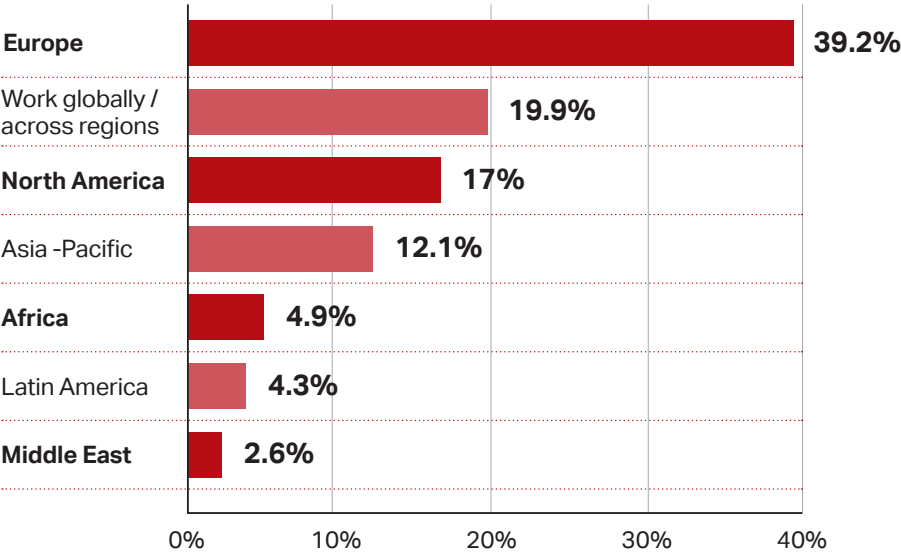
Primary Respondent Discipline



STEM respondents formed the largest single group at just under 30%, followed by those with a multi-disciplinary role at 24%.

Primary Respondent Geographic Base

European respondents made up the largest geographic group at almost 40%.



Responding to Today's Challenges

Being able to respond to the current challenges of scholarly publishing spans both individual and institutional 'readiness'.

Although there are differences in the detail between the views of academia and academic services respondents, a key take-away is that, at a high level, there is a surprising degree of consistency between these two groups.

Individual Readiness

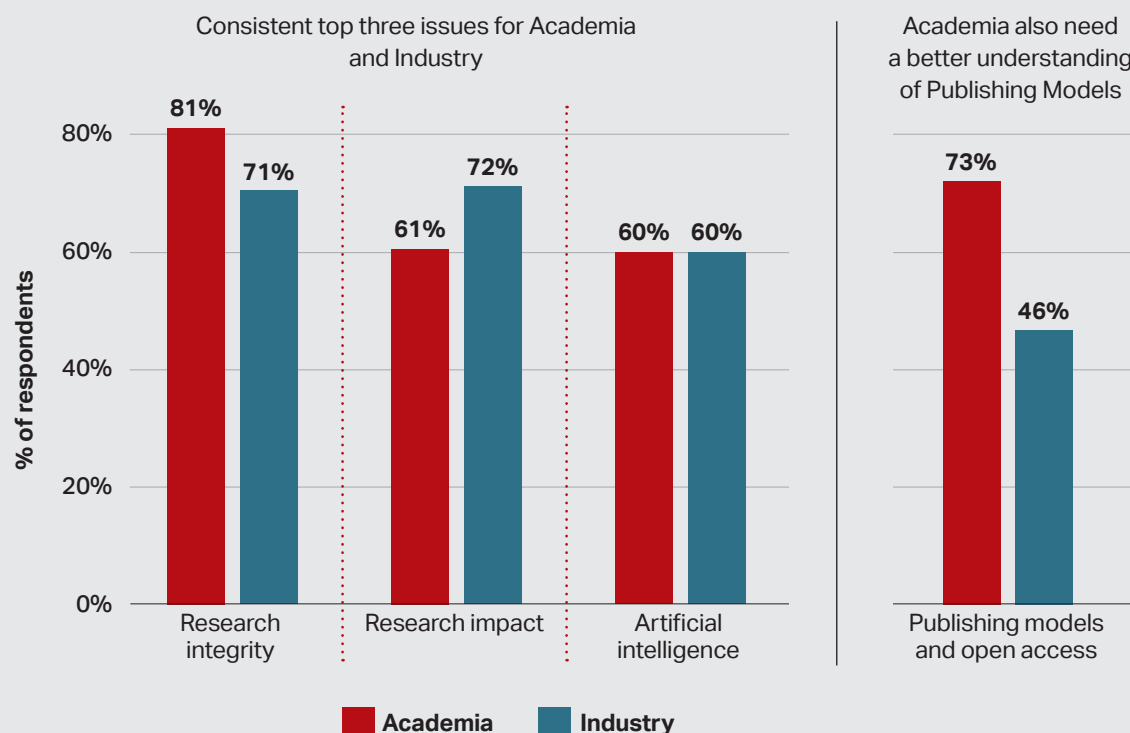
Under this topic, we asked respondents about specific areas where they felt the need to have a strong understanding in order to fulfil their role.

Questions covered eight knowledge areas :

1	Research integrity
2	Publishing models and open access
3	Research impact expectations
4	Artificial intelligence
5	Library budgets and affordability
6	Data access, reuse, and computability
7	Legal and licensing clarity (AI, TDM, reuse)
8	Metrics and research evaluation

Both academia and industry respondents highlight the same three top issues where they need a solid understanding: 'Research integrity', 'Research impact expectations', and 'Artificial intelligence'.

How important is it that you understand the following areas in order for you to effectively perform your role? Top issues rated Highly Important



For Academia, 'research integrity' was the most important issue by some margin, and we can also observe that among these top three there is a greater 'spread' from academia respondents than that of industry respondents.

- Academia responses range from 81% for 'research integrity' down to 60% for 'Artificial intelligence'. By contrast, industry responses ranged from 72% for 'Research impact expectations' down to 60% for 'Artificial intelligence'.

The data also highlight that 73% of academia respondents also thought that 'Publishing models and open access' was highly important to have an understanding of, though this was reflected less in answers from industry respondents.

If we look at those same eight issues through the lens of how the need for understanding has changed over the last three years, there is again some consistency.

We can firstly note that 'artificial intelligence' has been a high priority for all respondents over the last three years – well above other issues.

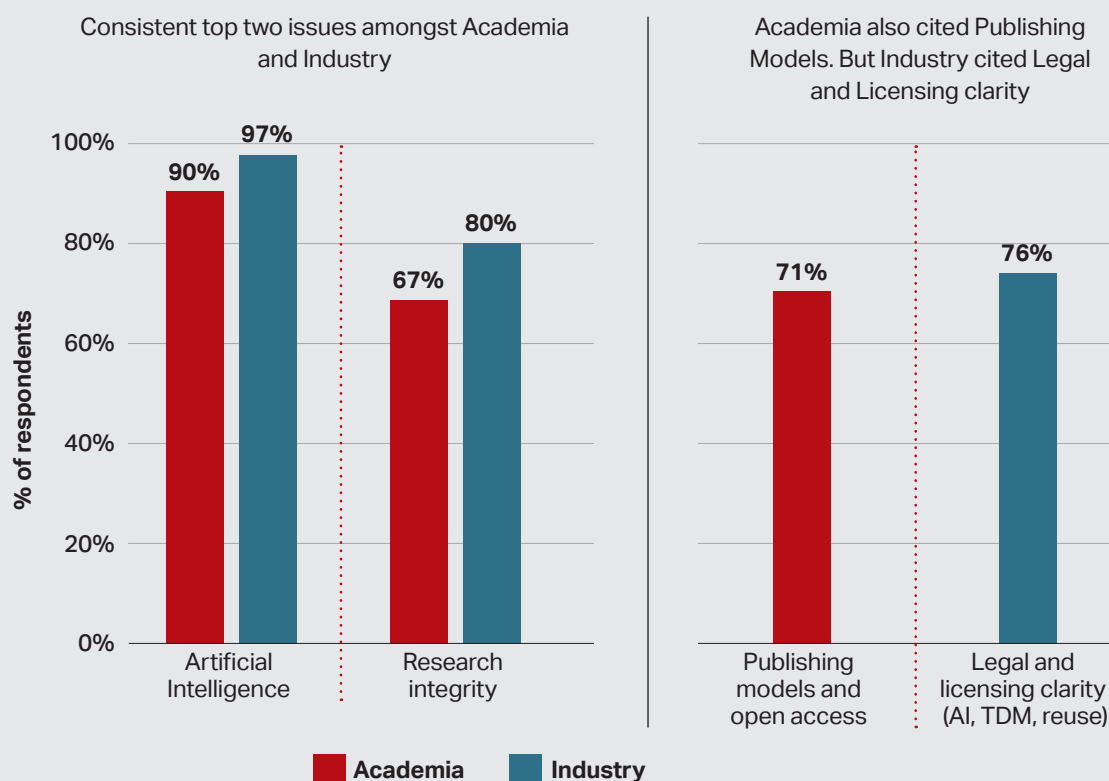
And we can see that 'research integrity' has proved to be another common issues where the need for understanding has increased for the majority.



81%

Research integrity
most important
issue for Academia

How much has this need for understanding changed over the last three years? Top issues rated as 'increased'



But we can also note some divergence of views on how understanding has needed to increase:

- Academia has noted the rising importance of 'publishing models and open access'.
- Industry noted 'Legal and licensing clarity'.

Institutional Readiness

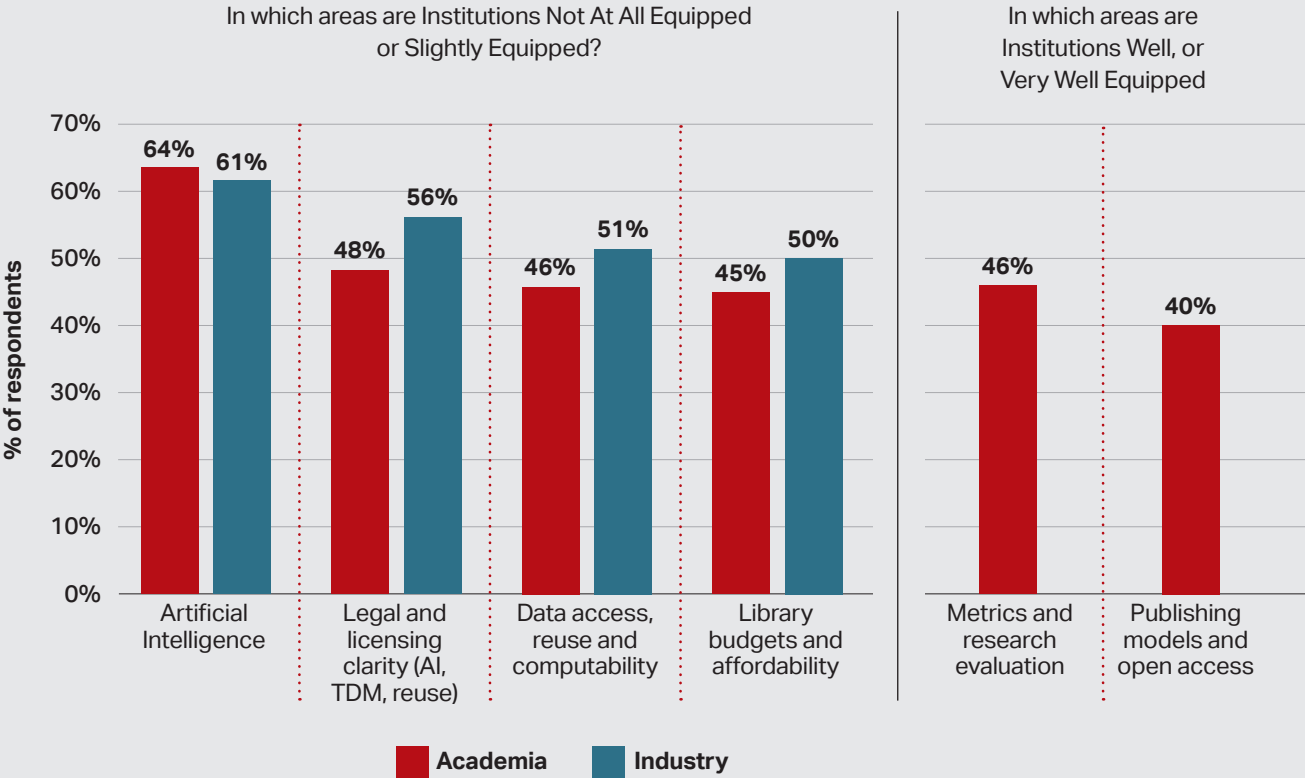
On this topic, we asked respondents whether they felt institutions were currently well equipped to respond to developments in these same eight areas.

As a general observation, industry respondents were more critical of institutions' readiness than respondents from academia in all eight areas.

As with individual readiness, there is some broad consistency in view. We can see that there are four areas where academia and industry agree that institutions are only slightly or not at all well equipped to deal with developments, and unsurprisingly the area of least readiness is 'artificial intelligence'.

- Almost two thirds of both groups of respondents feel that institutions are to some degree lacking in readiness regarding artificial intelligence developments.

How well are academic institutions currently equipped to respond to developments within each area?



The three other areas where institutions appear to lack readiness are:

- 1 Legal and licensing clarity
- 2 Data access, reuse, and computability
- 3 Library budgets and affordability

At the other end of the scale, if we look at areas where academic institutions are well or very well equipped to deal with developments, an immediate observation is that industry respondents do not rate institutions highly in any of these areas.

Academia respondents are slightly more generous in their views, highlighting two areas where academic institutions are well or very well equipped to deal with developments:

- Metrics and research evaluation
- Publishing models and open access

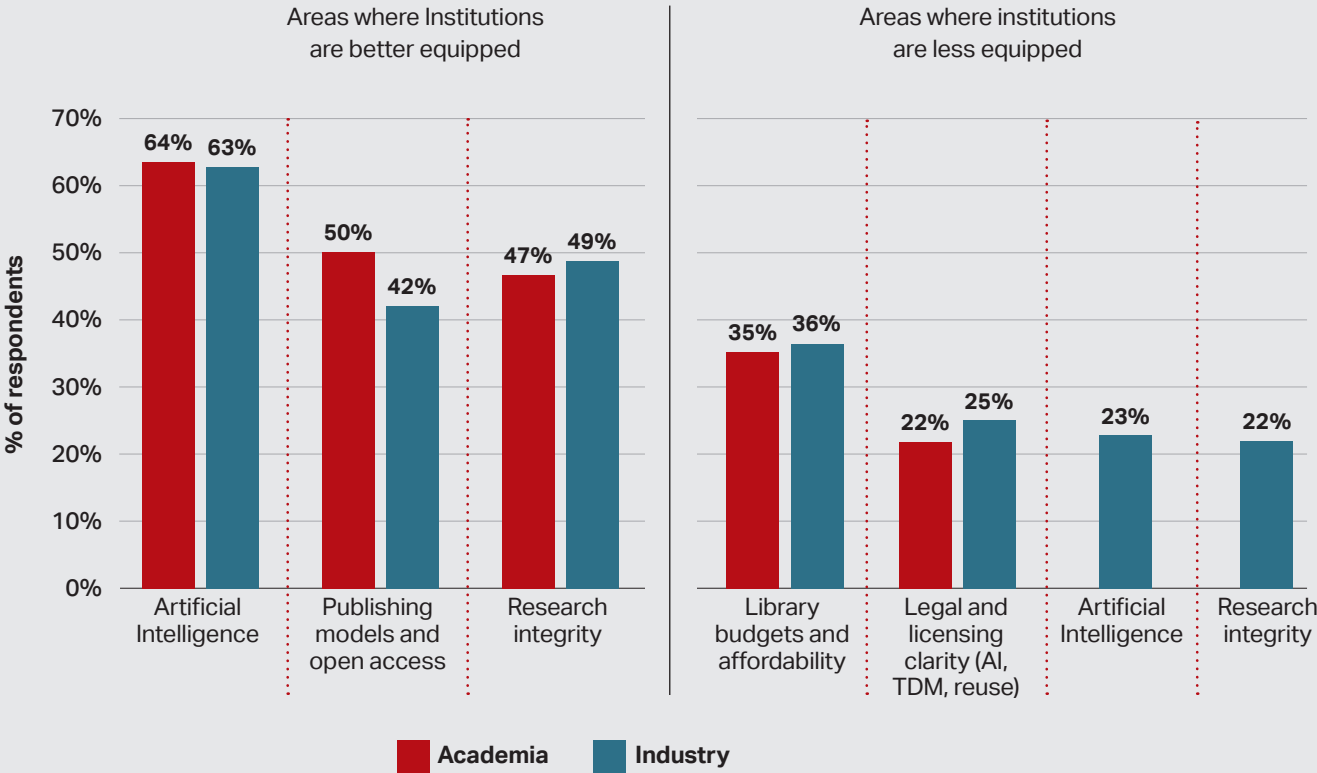
Lastly, we asked all respondents how institutional readiness has changed over the last three years. Overall, we can say that academic institutions have improved in their readiness in all eight areas – and in some, quite significantly.

All respondents see improvements in institutional readiness in the three areas of ‘artificial intelligence’, ‘publishing models and open access’, and ‘research integrity’.

- Improvements in ‘artificial intelligence’ readiness is most notable.

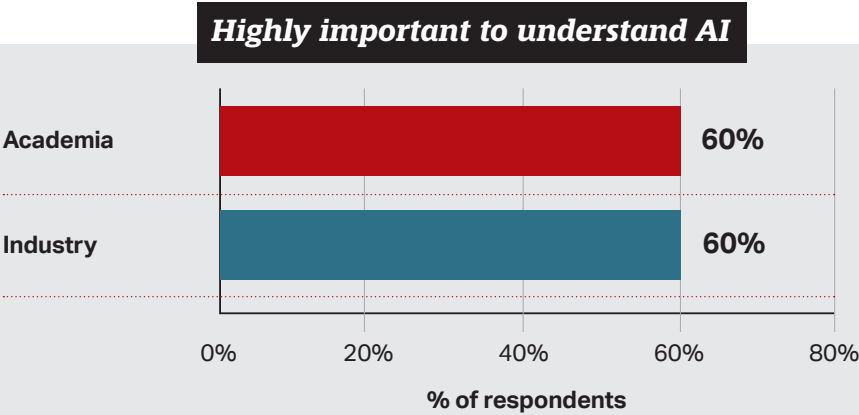
At the other end of the scale, there is consensus that readiness has fallen in the areas of ‘library budgets and affordability’ and in ‘legal and licensing clarity’. However, we can also note that industry respondents cited ‘artificial intelligence’ and ‘research integrity’ as areas where readiness has fallen. This view is not reflected in academia; clearly there are some opposing views on these two areas among respondents.

How has this institutional readiness changed when compared to 2023?



Focus on Artificial Intelligence

One area of individual understanding and institutional readiness stands out as being consistently of concern is artificial intelligence, and it is worth extracting that one issue for deeper analysis.

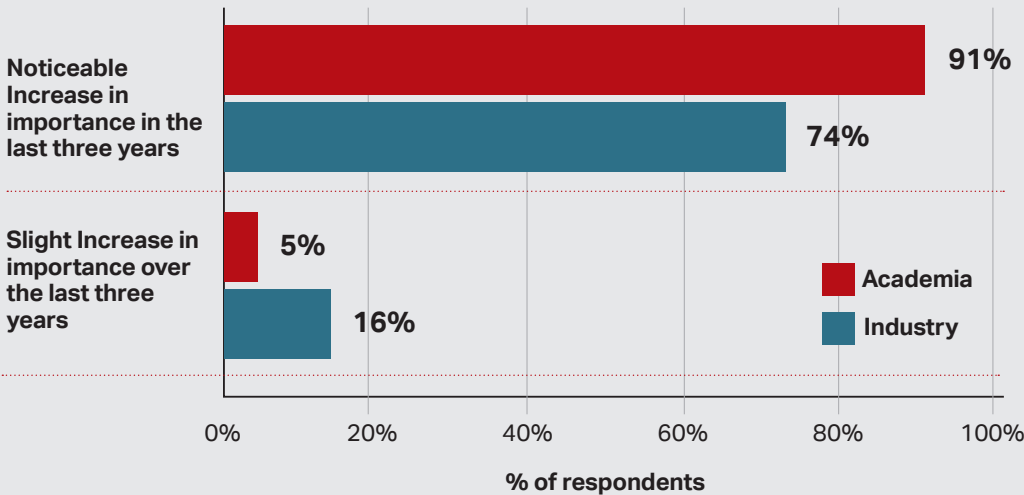


91%
of respondents
within industry
believe a solid
understanding of AI
has become more
important

Individuals across the whole survey are clear that they need to understand developments in artificial intelligence in order to successfully perform their role.

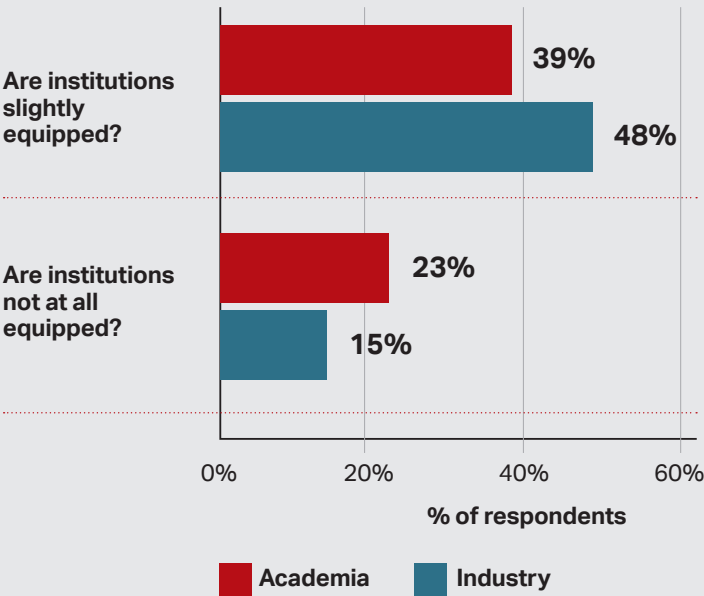
And at the same time, they nearly all see a noticeable increase in the importance of having a solid understanding of this areas over the last three years. Within industry this figure is 91% of respondents.

Has the importance of understanding AI changed in the last 3 years?



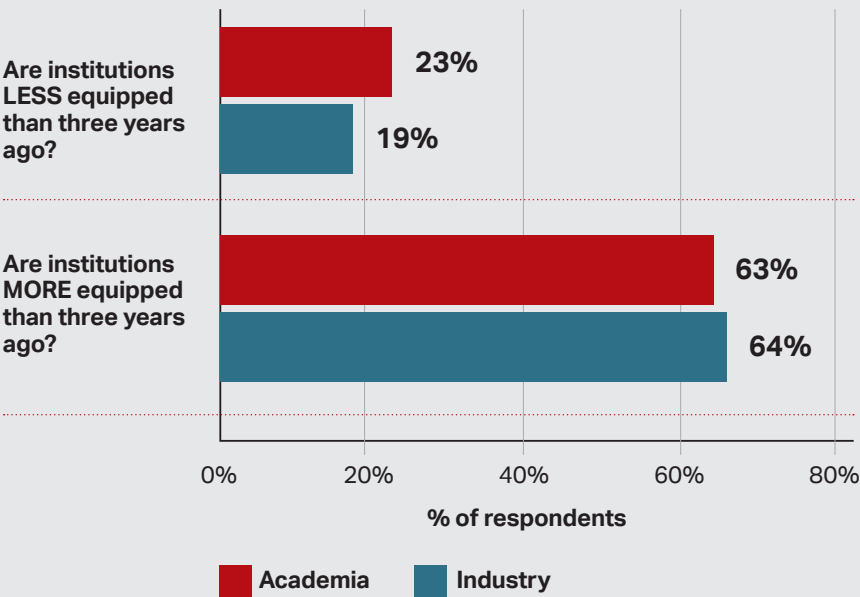
While it is a topic that is front of mind for individuals, many respondents view institutions as not well equipped to handle developments. Those in industry are somewhat more critical of academic institutions than those in academia.

How well are institutions equipped to handle developments in AI?



However, on a more positive note, institutions have made notable progress on their readiness to handle developments in artificial intelligence over the last three years, with almost two thirds of respondents seeing notable improvements.

Have institutions become more or less equipped to handle developments in AI over the last three years?



Power and Influence for Positive Change

Where power resides in scholarly publishing

Many players in the publishing ecosystem have power to influence change in the eight areas under consideration. These include:

Researchers	Technology providers
Academic institutions	Funders
Libraries	Governments / regulators
Publishers	

Our first consideration is to understand ‘where power currently lies’ to make changes. Among all our respondents, there is a consistent view that academic institutions have that power. This is especially true of respondents from academia.

We gathered detailed data for each of our eight areas, and as might be expected there are nuances in that detail. But summarising provides the following overview.

	Researchers	Academic institutions	Libraries	Publishers	Technology Providers	Funders	Government / Regulators
Overview of power: Academia		✓			✗		
Overview of power: Industry	✗	✓	✗				
	✓	Where there is power	✗	Where there is NOT power			

In more detail we can see that beyond this, there are views on the ecosystem players with notably less power to make improvements across the board.

- Academia respondents consider that technology providers do not hold much power to make improvements
- Industry respondents consider that both researchers and libraries hold little power to make improvements

If we look back to the four areas where all respondents feel that institutions still need to improve their readiness, we can see which ecosystem groups are thought to have the most influence

1

To continue to make improvements in readiness regarding **Artificial Intelligence**, the power specifically lies with technology providers, and slightly with academic institutions.

2

To continue to make improvements in readiness regarding **Legal and Licensing Clarity**, the power is somewhat spread between academic institutions, publishers, and also government / regulators.

3

To continue to make improvements in readiness regarding **Data Access , Reuse, and Open Access**, the power specifically lies with academic institutions.

4

And lastly, to continue to make improvements in readiness regarding **Libraries, budgets and Affordability**, there is a spread of power, but it would seem that academic institutions hold most power.

		Researchers	Academic institutions	Libraries	Publishers	Technology Providers	Funders	Government / Regulators
Artificial Intelligence	Academia		✓	✗	✗	✓		
	Academic Services			✗		✓	✗	
Legal and licensing clarity	Academia	✗	✓					✓
	Academic Services	✗				✓	✗	
Data access, reuse and computability	Academia		✓					
	Academic Services							
Library budgets and affordability	Academia	✗	✓	✓	✗	✗		
	Academic Services	✗	✓		✗	✗		✓
		✓	Where there IS power		✗	Where there is NOT power		

We also asked our respondents where power ought to lie in the future. There was little consensus here, with academia tending to suggest academic institutions, and industry respondents expressing few strong views on the matter.

However, two points do emerge:

- Research integrity would be best improved by institutions
- Improvements to artificial intelligence are better led by government / regulators rather than technology providers

RI

Research integrity would be best improved by academic institutions

Influence and support

Our last questions related to power and influence probed the areas where academic institutions are best supported by publishers and technology providers. We specifically looked at six specific areas:

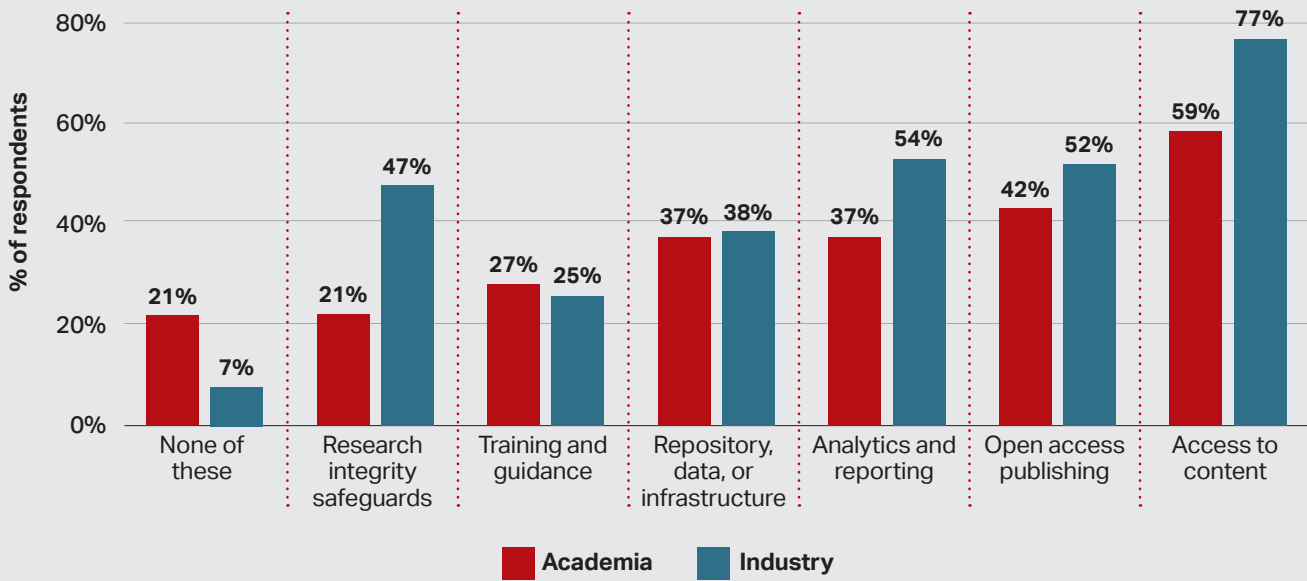
1	Research integrity safeguards
2	Training and guidance
3	Repository, data, or infrastructure support
4	Analytics and reporting
5	Open access publishing
6	Access to content

Industry respondents believe more strongly than academic respondents that institutions are getting meaningful support in most areas, but we can also note that institutions are best supported in the area of Access to Content.

- Analytics and reporting, and open access publishing, also appear to be perceived as well supported.

At the other end of the scale, 21% of academia respondents do not believe they are supported by the wider industry in any of these areas.

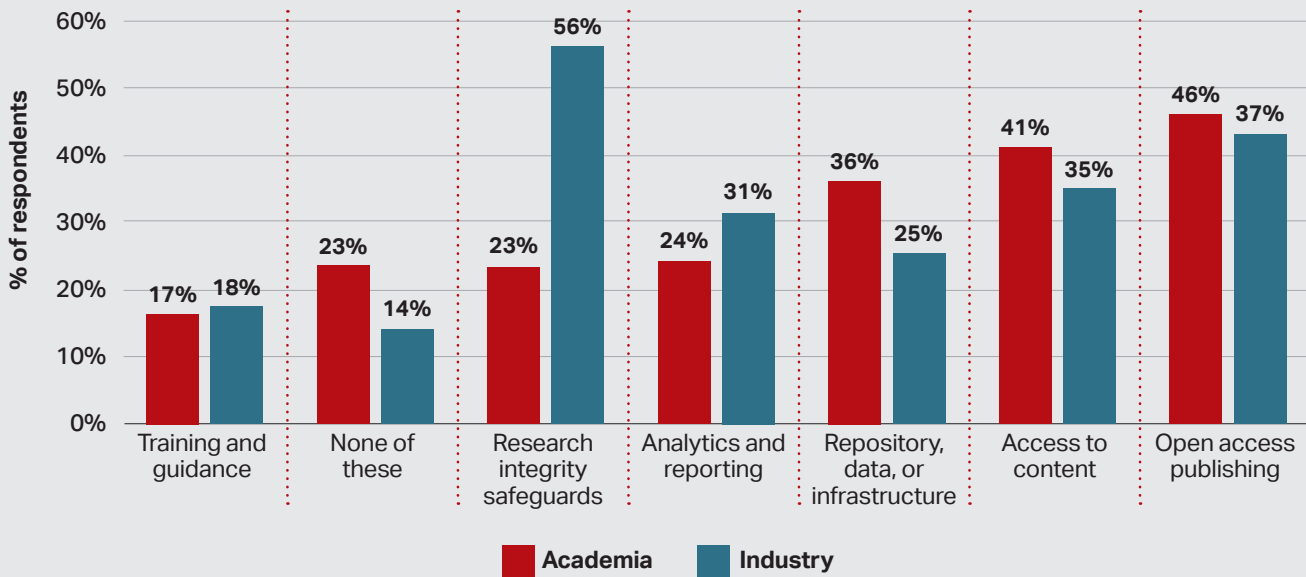
In which areas do you feel academic institutions are best supported by publishers and technology providers?



There are mixed views with regard to which areas have seen an improvement in support since 2023. Clearly, industry respondents are of the view that support has improved in the area of research integrity safeguards.

However, it is fair to say that there is some consensus around open access publishing, and access to content as well.

Which areas do you think this support has noticeably improved since 2023?



Institutional Relationships and the Future

Any broader agenda to shape future conversations that will drive construction development of the scholarly publishing sector has to understand where those conversations thrive, and where they break down.

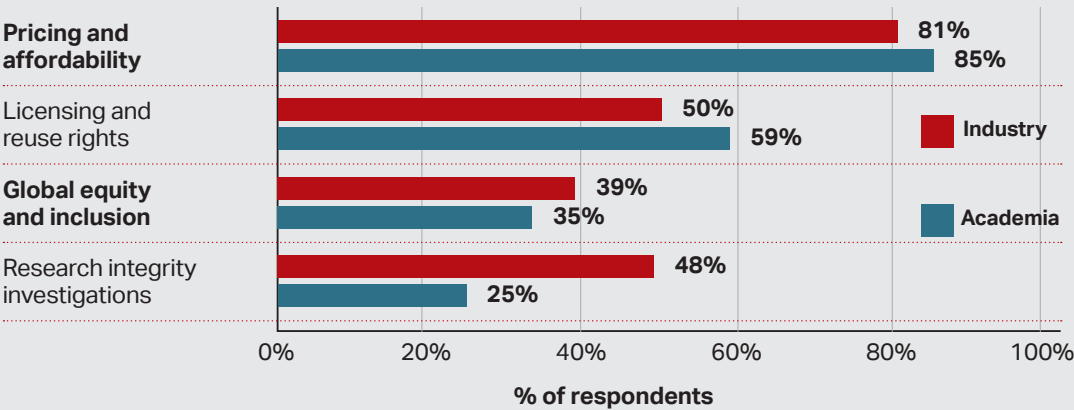
Collaborative break-downs

We asked whether any of these seven topics were ones where relationships between academic institutions and the wider scholarly communications industry often break down.

1	Pricing and affordability	5	Metrics and evaluation practices
2	Licensing and reuse rights	6	Research integrity investigations
3	Global equity and inclusion	7	Metadata quality and standards
4	AI and text/data mining		

While there were issues in all areas for some respondents, four areas stood out as being especially problematic.

Where do relationships between academic institutions and the wider scholarly communications industry most often break down?



Both academia and industry agreed that by far the most difficult topic is that of 'pricing and affordability'.

- More than 80% of respondents say this is where relationships most often break down, and it is interesting to note that this is a commercial topic that goes to the heart of the sector: budgetary scope vs commercial needs.

Other topics that more regularly cause a breakdown include:

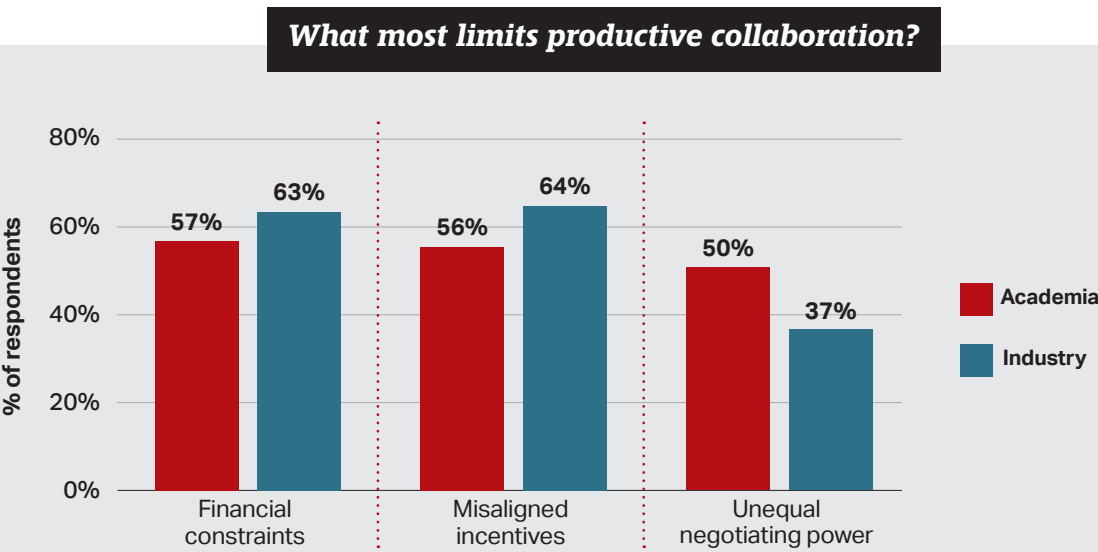
- 'Licensing and re-use', cited by more than half of our entire sample as being problematic.
- 'Global equity and inclusion', cited by more than one third of our sample as being problematic.

We have also highlighted the issue of 'research integrity and investigations', where almost half of respondents from industry see this as problematic – though this is not reflected in the responses from academia.

Collaborative limitations

With some understanding of the areas where communication breaks down, we turned our attention to the underlying points that limit constructive and productive collaboration. Here, we examined seven specific issues and asked respondents to pick three that they identified as root problems.

1	Financial constraints	5	Contract complexity
2	Misaligned incentives	6	Capacity constraints on both sides
3	Unequal negotiating power	7	Insufficient communication
4	Lack of transparency		



- ‘Financial constraints’ and ‘misaligned incentives’ are issues for both academia and industry respondents.
- Academics also highlight ‘unequal negotiating power’, though this is not picked up so much by industry respondents.

Academia also picked ‘lack of transparency’ and ‘contract complexity’ as roadblocks to greater collaboration, while industry respondents referred to ‘capacity constraints’.

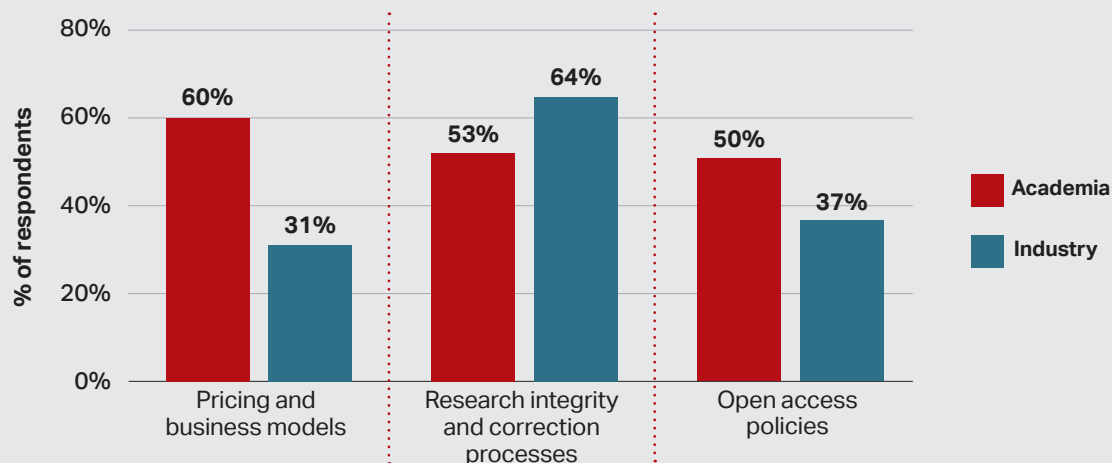
Drawing the above issues together, we are left with the impression that financial issues – actual and negotiation – are roadblocks that, if resolved, would make a significant impact on constructive dialogue.

This then also begs the question about the future role of academia in driving the scholarly publishing ecosystem. Where would the ecosystem benefit from greater influence from academia more generally? Perhaps unsurprisingly, we found different views from academia and industry.



Financial constraints’ and ‘misaligned incentives’ are issues for both academia and academic services

Which areas do you feel the scholarly ecosystem would benefit the most from an increase in influence from those working in academia?



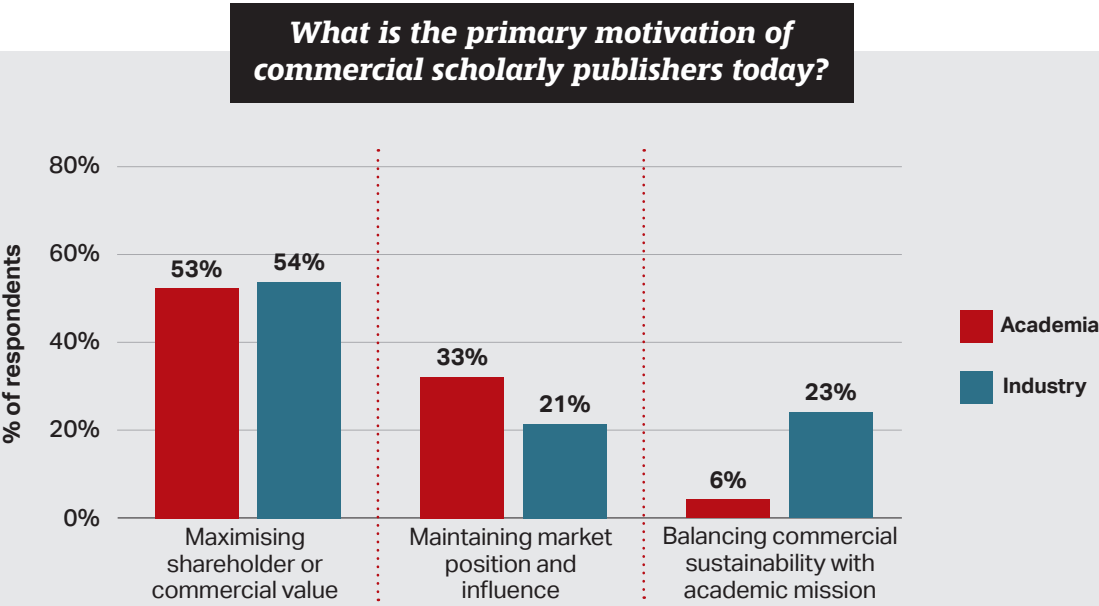
- Academia respondents themselves believe that the ecosystem would benefit most if they had greater influence on ‘pricing and business models’ – perhaps to help even up negotiating power and because finance issues generally are problematic.
- But industry respondents want to see academia have much greater influence on ‘research integrity and correction processes’ (which is where these respondents see constructive relationships commonly breaking down).

Ecosystem motivations

Our final set of questions examines motivations within different segments of the scholarly publishing ecosystem. Firstly, examining what were thought to be the primary motivations of scholarly publishers, we probed on five specific points:

1	Maximising shareholder or commercial value
2	Maintaining market position and influence
3	Balancing commercial sustainability with academic mission
4	Supporting research dissemination as a first principle
5	Responding primarily to funder and policy demands

Perhaps not surprisingly, more than half of all respondents thought the primary motivation was financial.

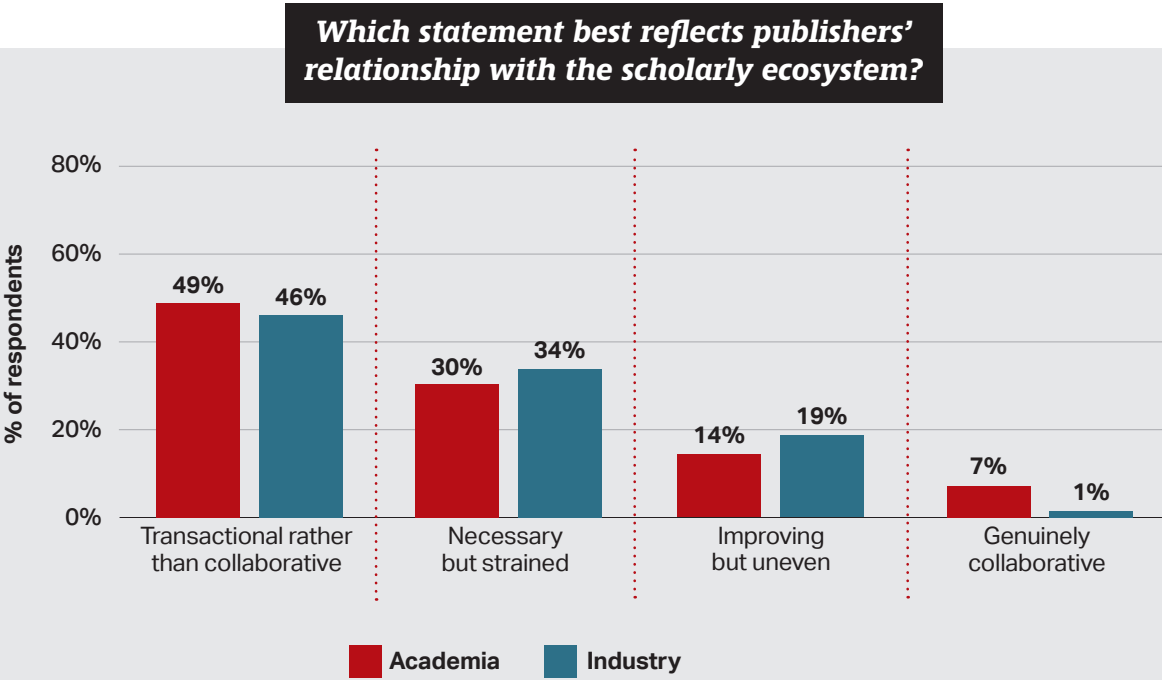


Interestingly, the view is held more or less equally across respondents from both academia and industry that ‘maximising shareholder or commercial value’ is the greatest publisher motivation.

Academia also picked up on ‘maintaining market position and influence’ as a motivating driver, while industry respondents preferred to highlight ‘balancing commercial sustainability with the academic mission’.

We might also note that hardly any respondents thought a primary publisher motivation was to ‘support research dissemination’.

These views on publishers are also reflected in how respondents tend to characterise academia’s relationship with publishers. Almost half of all respondents see that relationship as highly transactional.



Hardly any respondents characterise the relationship as collaborative, or even improving, so we might reasonably suggest that there remains much work to be done to create a base from constructive dialogue can start to improve this situation.

Moving Forward

Hard truths and conclusions

Hard truths

As a final question, we asked all respondents to tell us “**what is the hardest truth about the scholarly communications industry to discuss openly?**” – along with a choice of emojis to indicate whether their answer represented a positive, neutral or negative feeling.

From industry respondents, just 4% were “positive”, 46% were neutral, and 50% negative – while for those working in academia just 2% were positive emoji, 55% were neutral, and 43% were negative.

Here are some of the quotes we received – these were very representative of the hundreds that we received from both groups.

RI

“There is a monopoly in academic publishing that does not allow for open and collaborative science”

Academia

“The hardest truth lies in the fact that those in dire need of accessing information are increasingly left out

“Unethical use of AI at the current stage

“I have the feeling that public research agencies (i.e. the tax payer) are funding the publishers. I don't believe in the pay-per-publish open access model

“Scholarly comms is increasingly difficult to justify as a for-profit undertaking

“It is systematically unfair to the 'smaller' players

“The system is designed around prestige, incentives, and legacy structures – not around knowledge dissemination or public benefit

“There is a monopoly in academic publishing that does not allow for open and collaborative science; instead, they appear to be moving in the direction of open access even though costs continue to rise, with institutions and researchers being the most affected by the publishing model

“The reality of library budgets to publisher pricing

Academia (continued)

“Currently, the machinery of the academic communication industry is a business for publishers and an exercise in false meritocracy for a growing number of academics.

“Publishers have made fortunes on the unpaid labour of people in the academic sector, and have continued to grow those fortunes exponentially at the sake of library budgets

“Publishers are in a publish-for-profit mode and that's the hard truth

“Knowledge/research is considered as a commodity, but nobody acknowledges that

“Scholarly communications has become hostage to promotion opportunities and rankings for universities. Scholarly sharing of knowledge has taken a back seat. The cost is born by the funders and the researchers and publishers benefit from the profits. The balance is unequal

“That academia has waited too long to exert influence on commercial providers

“Open access is a nightmare, and allows publishers to make money without looking at the quality. At the same time, evaluation based on impact factors and number of published paper has damage a lot scientific integrity

“It is primarily a business that benefits from interacting with other actors in a certain form

“What is the price of a publication and what should it be to keep a sustainable scholarly communication system that is accessible for everyone.

“It only works for a fraction of the global academy community

“The academic sector (including researchers, academic institutions, government, funders, and others) should recover control over the publishing of scientific outputs again and stop outsourcing it

“Financial constraints in developing countries

“Lack of acknowledgement of the academics working for free that contribute to the outrageous and disgusting profits made by the industry

“The huge profits of the big five

“AI usage and its implications

“The untenable expansion of scholarly communications in their present form. Everyone knows there are issues but there is just lip-service paid to this from all sides rather than a serious and concerted effort to try to reset this before it collapses

“Academics trade in reputation, therefore, publishers sell (a well done imitation of) reputation for money. Scientific truth fell outside of the scopes of both parts. In conclusion, scholarly publishing is heading fast towards becoming a totally irrelevant, money-sucking machine

RI

“They steal the copyright of authors and place it behind paywalls, all in the name of profit”

Industry

“ Publishing is moving from what was basically a cottage industry run in US/ Europe to full-scale factory-style automation run by cheap workers in India, Malaysia, etc.

“ The huge profit margins of the commercial majors which stifles innovation, scholarship, everything ...

“ Justification of the enormous profits without acknowledging the financial strains of libraries, researchers, academic institutions, funders, and government agencies

The incentives of scholarly publishers vs academics – it can be difficult for the academic community to trust that publishers truly care about societal impact and advancing research rather than just making profits

I think we should discuss the actual value of what the publishing industry provides to the academic community. The lack of transparency means that they control their own narrative. Most researchers have no idea what their institutions are paying for or how their publishing choices (based on flawed values) affect their workplace

“ Who really profits financially and must it ever be so?

“ The hardest truth is that even non-profit publishers must ensure financial sustainability, not for profit, but to maintain the full publishing infrastructure that underpins scientific progress, integrity, and trust

“ Scholarly communication cannot be a business. It has to be made non-commercial and value quality over quantity

“ That the incentives within academia and within publishing to publish more articles not better articles are damaging the integrity of research and scientific progress

“ Too many scientific papers are being published to meaningfully represent the actual progress of academia

“ That for-profit businesses need to make actual profits to survive. It's easy to armchair quarterback about how things SHOULD be (cheap/ free, etc.), but it's much harder actualize that large scale

“ They steal the copyright of authors and place it behind paywalls all in the name of profit

“ Corporate greed

“ That scholarly communication is strongly shaped by commercial interests and clientelistic networks, and that the value of knowledge is often subordinated to the market – particularly in certain parts of Europe, such as Spain, where scientific output is significant but insufficiently supported, partly due to limited resources and partly because the dominant language is not English.

“ Pressure to publish, rising research integrity issues and AI making it harder to detect fraud, could have potentially turbulent outcomes given political backdrop / distrust of science

“ Publishers have co-opted the original intentions of the open access movement so now it is just one more (overpriced) parts of their overall portfolio

“ I don't think a truly equitable publishing model, that puts researchers first, will ever exist until we get rid of the “publish or perish” mentality.

Industry (continued)

“That publishing is a commercial business, and until funding and evaluation paradigms radically change, publishers will prioritise the future of their business and market position over the academics they serve

“Lack of honesty at all levels. Increasingly instrumental view of publishing, combined with the huge number of Chinese researchers and their incentive system.

“For commercial publishers (including privately-owned) as well as for non-commercial publishers, a reasonable profit/surplus is not a luxury, but an economic requirement for sustainability

“That scholarly publishers do bring real value to the research ecosystem and universities would be in a difficult place without them

“That OA isn't all it's cracked up to be and has had a significantly negative impact on scientific societies' abilities to support their members and advance the professions

“I find it troubling that they have co-opted the open science movement for their own benefit. They're commercialising it. And by "they," I mean the big publishers. On the other end of the spectrum, among small publishers of professional magazines, you see a lack of OA awareness and policies

“Commoditisation of academic research under the guise of "open" communication. And, the imbalance of compensation between 99% of the publishing workforce and the 1% at the top

“Perverse incentives as the root of the research integrity crisis and how/where to change the current system

“That knowledge may be a public good, but that converting raw knowledge into robust information, intelligence, and actionable insights requires significant investment, regardless of who is producing it and what publishing model supports that production

“With all of the advancements in technology and significant reproducibility challenges, should journals and journal articles, in their current form, have a future or are they an outmoded format that needs to end

“Outdated academic research evaluation policies that emphasize quantity over quality; tenure and promotion decisions based primarily on the number of publications

Conclusions

Our survey findings suggest a sector that is aligned in some important ways, but divided in others.

There is broad agreement across stakeholder groups about the key issues facing scholarly publishing. However, that alignment on priorities does not translate into alignment on trust. Confidence between distinct parts of the ecosystem remains fragile.

Institutions are seen as improving in many areas, particularly in response to newer challenges. Yet clear confidence gaps remain – especially around financial sustainability, licensing clarity, and artificial intelligence.

Financial tension sits beneath many of the areas where relationships break down, impeding negotiations and limiting collaboration.

Artificial intelligence has emerged as the defining systemic challenge – cutting across research integrity, licensing, infrastructure, and long-term strategy.

We should stress at this point that these are not the views of *Research Information*, we have simply asked our readers what they think – and these are the patterns that seem to come through.

If there's one general takeaway from the responses, it's that people would like to see conversations in the sector move towards practical change.

For example, respondents suggested that pricing discussions could be less about hard-nosed negotiations and more about finding models that feel sustainable and transparent. Artificial intelligence is another area where people feel the rules of the road still aren't entirely clear. There's a sense that responsibilities – who decides what, who governs what – need to be better defined.

Trust also came up repeatedly in the comments. Some respondents feel that more transparency across the system could help rebuild confidence between institutions and the industry. There were also suggestions around aligning incentives a bit better – making sure the different players in the system are actually pulling in roughly the same direction.

Finally, quite a few respondents pointed out that institutions themselves will probably need stronger internal expertise around AI if they want to engage confidently with everything that's coming next.

If the sector is going to move forward constructively, respondents indicate that we'll need strong leadership from institutions, clearer regulatory frameworks, more transparent commercial models, and perhaps above all a stronger sense that responsibility is shared across the whole ecosystem.



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