Transformative Agreements & Read and Publish Deals:
A Guide for Academic Libraries

NAVIGATING THE SHIFT TO OPEN ACCESS

Scholarly publishing is evolving, and academic libraries play a critical role in shaping its future. Transformative agreements (TAs) and Read and Publish (RAP) deals help institutions manage the transition to Open Access (OA) while maintaining access to subscription content. These agreements repurpose existing budgets to fund both OA publishing and traditional access, ensuring a balanced approach to scholarly communication.

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WHAT ARE TRANSFORMATIVE AGREEMENTS?

Transformative agreements shift library expenditures from subscription-based models to Open Access publishing. They allow institutions to support OA for their authors while continuing to provide subscription access to paywalled content.

TAs offer:

- A structured transition from traditional paywalls to OA publishing.

- Budget adaptability — financial impact depends on publishing output, publisher approach and agreement structure.

- Increased visibility and accessibility of institutional research.

HOW READ AND PUBLISH AGREEMENTS WORK

RAP agreements bundle subscription fees with OA publishing costs, enabling a more integrated and simplified approach to scholarly publishing.

Key benefits include:

- **Dual-Impact Investment:** Maintains subscription access while expanding visibility through Open Access.

- **No Additional Cost for Authors:** Eliminates individual Article Processing Charges (APCs) for affiliated researchers.

- **Gradual OA Transition:** Supports a measured shift toward full OA publishing.

CONSIDERATIONS FOR LIBRARIES

While transformative agreements offer significant advantages, they require careful negotiation to ensure:

- Fair value and cost control.

- Publisher alignment with OA transition goals.

- Sustainable pricing models that accommodate research-intensive institutions.

COMMON OPEN ACCESS MODELS

Academic institutions encounter a range of RAP models,
each with distinct features:

1 **Transactional OA Models:** These agreements charge a fee per published article, shifting the cost burden directly to the research producer. While scalable, this model raises concerns about affordability for high-output institutions and equity across disciplines.

2 **Hybrid Read & Publish Spend:** This model combines subscription and OA fees into a single contract. While it simplifies financial management, the complexity of negotiations and potential cost increases require careful evaluation.

3 **Diamond or Alternative Funding Models:** These agreements rely on external funding sources, such as institutional or society support, to cover publishing costs without charging APCs. They promote financial sustainability but may be limited in scope and subject to funding constraints.

COMMON OPEN ACCESS MODELS CONTINUED

4 **Subscribe to Open (S2O):** A cooperative approach where libraries continue paying subscriptions, and if enough institutions participate, the content is made OA. This model fosters collective funding but requires a critical mass of commitments to succeed.

5 **Offsetting Agreements:** These deals adjust subscription fees based on an institution's OA publishing activity, aiming to balance costs over time. They help transition to OA while maintaining budget predictability but can be complex to implement effectively.

THE IMPACT ON SCHOLARLY COMMUNICATION

RAP agreements enhance research visibility, financial oversight, and administrative efficiency. However, they also raise concerns about cost increases and market competition.

To navigate this landscape effectively, libraries should:

- Evaluate agreements based on long-term cost sustainability.

- Assess how different models align with institutional publishing output.

- Ensure contracts support both OA goals and financial stability.

SIMPLIFY THE MANAGEMENT OF SUBSCRIPTION CONTENT WITHIN READ AND PUBLISH DEALS.

Reach out to learn how we help libraries maintain access while navigating Open Access transitions.

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