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Breaking the Paywall: Reclaiming Knowledge for the Public Good in the Era of Digital Transformation

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<https://libraries.uta.edu/news-blogs/whats-behind-paywall>

This policy brief critiques the profit-driven dominance of academic publishing by corporations like Elsevier and Wiley, which impose high subscription fees and article processing charges (APCs) that marginalize researchers in low- and middle-income countries (LMICs). These inequities limit access to critical research and exclude Global South contributions from global discourse. While open access (OA) offers a solution, the commercialization of "gold OA" models perpetuates exclusivity, while the equitable diamond OA model remains underfunded. Prestige-driven academic culture further entrenches this system by prioritizing high-impact journals tied to commercial publishers. Emerging technologies like blockchain and AI offer potential solutions but are hindered by limited adoption and governance frameworks. To address these disparities, the brief aligns with UN Sustainable Development Goals, advocating for investment in not-for-profit OA platforms, reformed academic incentives emphasizing societal impact, mandated OA for publicly funded research, and increased support for LMIC researchers. Transformative action is essential to prioritize public good over corporate profit, democratize access to knowledge, and create a more inclusive global research ecosystem.

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Introduction

The academic publishing landscape has evolved in response to heightened expectations for academics to publish, driven by its influence on career advancement and university rankings (Abizadeh, 2024). This demand has created a lucrative market for commercial entities that manage academic publications, further solidifying their dominance (Abizadeh, 2024). While these entities capitalize on the system, the labor of authors and reviewers is framed as part of their responsibility to contribute to society through research dissemination and community service, often receiving little to no compensation in return.

This system reinforces global knowledge inequities, with the Global North functioning as a hegemonic gatekeeper that legitimizes knowledge through publication. As a result, institutions and researchers in the Global South face significant barriers, including exorbitant subscription fees and limited resources, which impede access to critical research and marginalize their contributions to global discourse.

While misinformation continues to proliferate online, the inequitable access to peer-reviewed knowledge further widens the gap between reliable information and public discourse. Addressing these systemic imbalances is essential for fostering a more equitable and informed global academic community.

Aligned with the United Nations Sustainable Development Goals (United Nations, 2015), particularly Goal 4 (quality education), Goal 10 (reduced inequalities), and Goal 17 (partnerships for the goals), this policy brief emphasizes the importance of enhanced North-South, South-South, and triangular cooperation to ensure equitable access to science, technology, and innovation. Central to this effort is the improvement of international mechanisms for knowledge sharing and the establishment of a global technology facilitation platform. Additionally, addressing policies on the expectations and promotion of academics and researchers is crucial to creating a more inclusive research ecosystem. Such policies should balance the pressure to publish with the need to foster genuine collaboration and equitable access to research and resources, thereby promoting a more sustainable and collaborative global academic landscape.

Key Issues

Profit-Driven Dominance of Academic Publishing

The academic publishing landscape is dominated by a few corporations—Elsevier, Wiley, Taylor & Francis, Springer Nature, and SAGE—that have turned knowledge dissemination into a profit-driven enterprise (Nguyen, 2024). These companies achieve profit margins as high as 30–40%, exceeding even those of leading tech giants (Abizadeh, 2024).

Their profits come at the expense of public institutions, which are compelled to allocate substantial portions of their budgets to subscription fees for journals containing research they have often funded or produced. Beyond this financial burden, universities face additional pressure to meet compliance standards, as minimum journal subscription requirements are mandated for institutions to maintain their university status. This system entrenches academic dependency on private entities, undermining the public mission of knowledge creation. Moreover, the centralized control of these publishers stifles competition, limits innovation, and impedes the democratization of knowledge.

Deepening Global Knowledge Inequities

High subscription fees and article processing charges (APCs) create barriers for institutions and researchers in low- and middle-income countries (LMICs), perpetuating a system of knowledge exclusion among the Global South (Creagh & Mitchell, 2022). While wealthier universities in the Global North maintain access to premier journals, their counterparts in LMICs are left with limited or no access, exacerbating disparities in education and research capabilities. This structural inequity not only widens the global knowledge divide but also marginalizes the voices of researchers from underfunded regions, reducing their ability to contribute meaningfully to global scientific discourse. As a result, critical local, and indigenous knowledge that could inform global challenges remains inaccessible or undervalued.

Limited Impact of Open Access

Although open-access (OA) publishing offers a pathway to democratize knowledge, it is increasingly co-opted by commercial publishers through "gold OA" models (Spitalniak, 2024). These models require authors to pay APCs, which can reach thousands of dollars per article, ensuring that only well-funded researchers or institutions can afford to participate. This system transforms the barrier from the reader to the author, maintaining financial exclusivity. Meanwhile, the more equitable diamond OA model—where neither authors nor readers bear costs—remains underfunded and lacks institutional support, preventing it from scaling to challenge commercial publishers effectively. This disparity undermines the transformative potential of open access.

Prestige-Driven Academic Culture

The reliance on journal prestige, often determined by impact factors controlled by commercial publishers, reinforces the dominance of profit-driven journals. Researchers are incentivized to publish in high-impact journals to secure funding, promotions, and tenure, sidelining not-for-profit journals that lack comparable prestige. This culture perpetuates a cycle where the legitimacy of research is tied to the branding of for-profit entities rather than its societal relevance or



accessibility. Early-career researchers, in particular, face immense pressure to conform to these norms, making it difficult to break away from the existing system.

Potential of Emerging Technologies

Innovations such as blockchain and artificial intelligence hold significant promise for decentralizing academic publishing. Blockchain can create transparent and tamper-proof systems for research dissemination and peer review, reducing the dependency on centralized gatekeepers. Artificial intelligence has the potential to streamline editorial processes and enhance the efficiency of peer review. However, these technologies remain in their infancy, hindered by limited adoption, high development costs, and a lack of institutional investment. Furthermore, the absence of governance frameworks around these technologies raises concerns about their equitable application and the risk of new monopolistic practices emerging.

Institutional and Governmental Gaps

While some initiatives, such as Harvard University's Office for Scholarly Communication and the European Commission's Open Research Europe platform, showcase the feasibility of open-access publishing, these efforts are insufficiently coordinated and lack global reach. Institutional and governmental inertia in adopting comprehensive open-access mandates leaves researchers at the mercy of commercial publishers. This failure to prioritize public good over corporate interests undermines the potential for systemic change and entrenches existing inequities.

Policy Recommendations

Promote Not-for-Profit and Open Access Models

Governments and universities must actively invest in, promote, and establish institutional not-for-profit publishing platforms, particularly those operating under the diamond OA model. These platforms should be integrated into institutional practices and funded sustainably through pooled resources from governments, academic institutions, and philanthropic organizations. Preprint platforms like arXiv should be institutionalized as standard tools for early-stage knowledge dissemination. The global academic community must recognize that continued dependence on commercial publishers reinforces inequity and stifles innovation.

Reform Academic Incentive Structures

Academic institutions must critically reevaluate the metrics used to measure academic success, a reevaluation deeply connected to the notion of "creating a market" that prioritizes publication in high-impact commercial journals. To break away from this paradigm, tenure and promotion criteria should be decoupled from journal prestige and instead emphasize the

societal impact and accessibility of research. Institutions must be empowered to define these metrics autonomously, allowing them to determine what ideas, issues, solutions, innovations, and discourses are most relevant and meaningful in their specific contexts. In the Philippines, institutions should actively engage in decision-making processes to shape their own academic priorities and measures of success. Explicitly rewarding contributions to not-for-profit and open-access journals can counter systemic biases that perpetuate the dominance of commercial publishers. By shifting incentives, institutions can enable researchers to prioritize public good over profit-driven prestige and compliance with policies like CMO 15 s. 2019 (Commission on Higher Education, 2019).

Mandate Open Access for Publicly Funded Research

Governments must enact legislation requiring all publicly funded research to be made freely available in open-access repositories (Espinosa, 2014). Compliance should be enforced with penalties for institutions or researchers who fail to deposit their work. These mandates must be supported by robust infrastructure for repositories and include provisions to ensure long-term sustainability and accessibility.

Invest in Technological Innovations

Universities and governments should fund the development and implementation of blockchain-based platforms and AI tools to decentralize and streamline academic publishing (People's Praxis, n.d.). Blockchain technology can disrupt centralized control by enabling transparent, tamper-proof records for peer review and publication. AI tools can address inefficiencies in the peer review and editorial processes. However, these technologies must be governed by ethical frameworks to ensure equitable application and prevent new forms of monopoly.

Address Global Knowledge Inequities

Special attention must be given to supporting research capacity in the Global South. Governments, international organizations, and high-income institutions must provide funding, technical assistance, and infrastructure to enable LMICs to access and contribute to global research platforms. Equitable collaborations between researchers in high- and low-income regions must be prioritized to create a more inclusive and representative global knowledge ecosystem.

Increase Awareness and Advocacy

Advocacy campaigns must not only educate but also mobilize researchers, policymakers, and institutions to challenge the exploitative practices of commercial publishers. These efforts must highlight the systemic inequities perpetuated by the current system and advocate for collective action to promote open-access initiatives. Advocacy must adopt a global perspective, amplifying underrepresented voices and building coalitions across disciplines and regions.



Ensure Financial Sustainability of Open Access

Collaborative funding models involving governments, academic institutions, and philanthropic organizations are essential to sustain not-for-profit journals. Funding allocation must prioritize transparency and accountability, ensuring that resources are used efficiently. Operational efficiencies, such as shared publishing infrastructure, should be explored to reduce costs while maintaining high standards of peer review and editorial quality.

Monitor and Regulate Commercial Publishers

Regulatory bodies must impose strict antitrust measures to dismantle monopolistic practices by commercial publishers. Transparency laws should mandate detailed reporting on APCs and subscription fees, holding publishers accountable for exploitative practices. Governments should incentivize universities and libraries to divest from commercial publishers and invest in open-access platforms. A confrontational regulatory approach is necessary to disrupt the entrenched power of these corporations.

Conclusion

The systemic inequities entrenched in the current academic publishing model demand immediate and transformative action. While technological advancements like blockchain and artificial intelligence provide promising avenues for disrupting profit-driven gatekeeping, the real challenge lies in altering the institutional and cultural norms that perpetuate exclusivity in knowledge dissemination. Universities and governments must lead this change by prioritizing not-for-profit and open-access models, ensuring equitable access to research for all scholars, regardless of geographic or economic constraints.

Crucially, this transition must address the underlying prestige economy that favors high-impact commercial journals over open-access alternatives. A shift in academic evaluation metrics—emphasizing societal impact rather than publication venue—is essential to breaking the cycle of dependence on commercial publishers. Furthermore, governments must mandate open access for publicly funded research and provide robust funding mechanisms to sustain non-commercial platforms.

The democratization of knowledge is not merely an aspirational goal; it is a moral imperative in an era where misinformation flourishes while credible, peer-reviewed research remains behind paywalls (Torok, 2024). By reclaiming control over academic publishing, stakeholders can create a more equitable, inclusive, and impactful global research community. Now is the time to act decisively, ensuring that knowledge serves the public good, not corporate profit.

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Declaration

Sections of this manuscript were drafted and/or edited using AI assistance from ChatGPT. The authors verified and edited all AI-generated content to ensure compliance with ethical and scholarly standards.

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The PNU Educational Policy Research, and Development Office

The EPRDO is a specialized research center in the University focused on policy research and studies on teacher education. It is established to provide research-based policy recommendations to policy makers. It also serves as the clearing house for all data relevant to teacher education in the Philippines and beyond.

Vision

The Philippine Normal University through the EPRDO aims to be an innovation hub of teacher education research and educational policy studies.

Mission

To strengthen the culture of excellence in teacher education research and educational policy studies.

Objectives

The EPRDO shall manage the University's research production, enhance human resource capabilities, and share expertise to other Teacher Education Institutions (TEIs) in the area of teacher education research

Strategies

1. Establish and maintain a web-based university research portal that facilitates automated research management systems, and which also serves as the database of teacher education policies and teacher education research in the country and Southeast Asia.
2. Share research expertise and competence in teacher education research with other TEIs throughout the country;
3. Develop and disseminate the University research agenda
4. Design and implement the research capability program for faculty and staff;
5. Manage University's research production particularly the conduct of educational policy studies in education and teacher education; and
6. Serve as the implementing arm for research incentives and research ethics review.

Values

SYNERGY (Working collaboratively as a team)

EFFICIENCY (Delivering research services efficiently)

EXCELLENCE (Achieving high quality research outputs)

PRODUCTIVITY (increasing research production of the University)

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