

Executive Summary

Last year, SPARC released its [Landscape Analysis](#), an in-depth look at how academic and scholarly publishing are changing and the implications of those changes for the academic community. This was followed by the [Roadmap for Action](#), which was designed to provide higher education leaders suggested actions that institutions might take in order to manage the challenges surfaced in the Landscape Analysis.

What does the landscape look like one year later? This document takes a look at the events of the past year particularly the global COVID health and resulting economic crisis, and provides updates on the academic publishing market landscape, and the status of the key companies involved. It highlights several emerging trends in academic publishing market that merit close attention, including:

A significant deepening in the shift of major companies away from research publishing and towards research assessment;

A shift away from individual research distribution to more communal, consolidated models; and

The emergence of a “Bigger Deal,” where institutional content licensing is directly linked to the purchase of data analytics services.

This update examines the implications of these trends, and provides suggested actions for the community to consider, with a particular emphasis on establishing strong principles to guide the purchase of any data analytics related product or service. It also provides an appendix that reviews in deep detail the financial performance of key academic publishers in 2019 and 2020, as well as their response to changes in their respective marketplaces.

While the current environment presents the significant challenges, it also opens up a strategic opportunity for the academic community to think about a different future, and consider not just focusing on “reopening” using the same system, but to make substantive progress towards building a more equitable and open one.



About the authors

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SPARC.

For decades SPARC has catalyzed an open system for research and education on behalf of 240+ libraries in the U.S. and Canada, with sister organizations in Europe, Africa and Japan.



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