



2023 ANNUAL REPORT



KEVIN STRANACK

Operations Director

WELCOME

Welcome to this year's PKP Annual Report. It has been another year of exceptional growth for our community, with Open Journal Systems now being used by more than 44,000 active journals in 148 countries, publishing more than 12 million articles. The 3.4 version of our free, open source software is now translated into 68 languages, and the journals themselves are publishing with OJS in more than 60 languages.

PKP is honoured to be the software provider of choice for so many dedicated publishers, scholars, editors, and journal managers in their quest to communicate the research that matters to them and to readers everywhere, regardless of their means.

We hope you find our AR informative as well as inspirational, and that you will continue your community involvement, or will reach out for the first time. We look forward to hearing from you.

The [Advisory Committee](#) provides guidance to PKP on all important tasks. In doing so, we rely on reports from PKP teams and committees as well as the in-depth expertise of committee members.

After many years in this position, Allan Bell's term as chair of the committee came to an end. We would like to thank him for the outstanding leadership he has shown.

In 2023, we chose to have one main topic for each meeting, starting with Equity and Inclusion plus the revised membership conditions. We also started to release the meeting minutes (after approval and without personal details) in order to increase openness and transparency.

In view of further commercialisation and monopolisation tendencies, we are pleased to be part of the opposite movement - open, decentralised, sustainable, and international.

MARCO TULLNEY

Advisory Committee Chair



GOVERNANCE

The longstanding [PKP Members Committee](#) (MC) has recently been relaunched with a new mandate and membership. The Members Committee now works to facilitate better direction, coordination, and communication with and among [PKP's Interest Groups](#). Ten new members from a diverse range of organizations across the PKP user community were recruited in the early fall of 2023, and the members began meeting bimonthly in October 2023.

Members Committee

Since its creation in October 2023, the Members Committee engaged in notable activities that include PKP's membership changes, discussed forum plans, and ensured effective coordination through regular meetings, as well as evaluating membership benefits and event ideas.

Multilingualism Interest Group

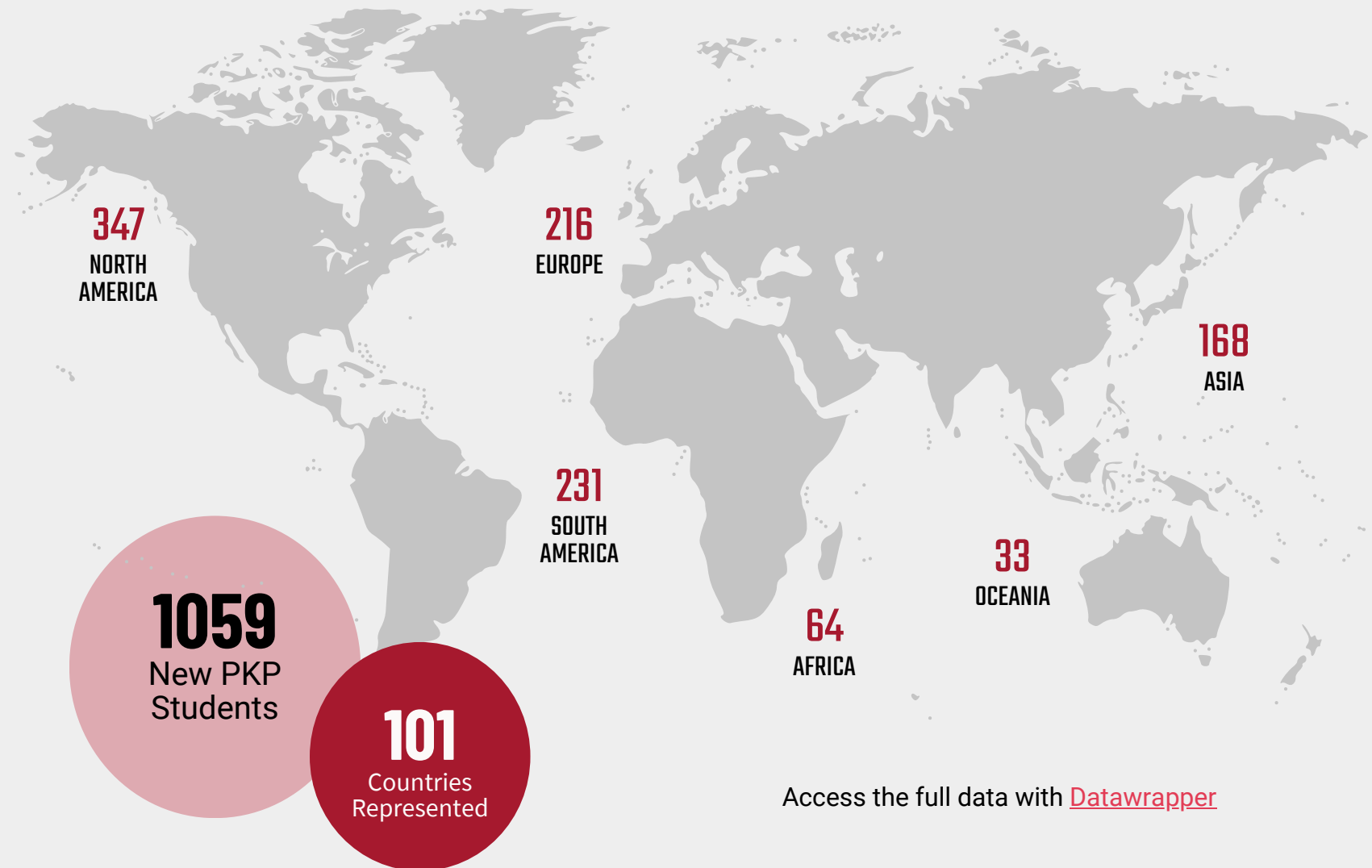
The [MIG](#) is intended to unite PKP staff and community members whose work centers around multilingualism, translation, and non-English language needs. The key milestones during 2023 included aligning priorities with the PKP Development team and its roadmap.

Education Interest Group

Since its inception in July 2023, the [Education Interest Group](#) (EIG) has been hard at work crafting a rubric to assess PKP School's existing course offerings. The aim is to refresh resources, integrate any new standards and best practices within the courses, and identify any potential course development ideas identified during the evaluation process.

This project comes well timed with the release of the Library Publishing Coalition's refreshed introduction to Getting Started with Library Publishing, to be reflected in the course in the coming fiscal year.

PKP SCHOOL STUDENTS



Access the full data with [Datawrapper](#)

Documentation Interest Group ↗

3 full new guides

3 updates for software versions

4 significant updates

5 ongoing projects

179,362
views on [Learning OJS](#)

PKP Community Forum ↗

2,287,890
Page Views

1,983
New Signups

7,087
New Posts

TECHNICAL COMMITTEE

The [Technical Committee](#) (TC) is formed by community members, partners, and PKP members, with the mandate to make decisions, recommend actions, oversee activities for sustainability and positioning, and emphasize the open, collaborative nature of PKP software.

In 2023, the TC consolidated working over three axes: participatory design of meetings, sharing experiences between members, and working in subcommittees.

Release & Support

The TC recommended PKP to stop supporting versions older than the second-to-last (3.3) when the next LTS (version 3.5) comes out. This advice is backed by available documentation and upgrade mechanisms, aiming to remove outdated code and streamline support.

Testing Workgroup

The TC Testing working group has actively participated in the 3.4 release by conducting general testing, performance tasks, and contributing ideas for the upgrade improvement.

Development Prioritization

The TC participated in prioritizing features for OJS 3.5, suggesting PKP focus on improving Communication, Submission Lists, Tracking, Typesetting (JATS), Data Migration, Import / Export, and Compliance Integration, and recommended a process for choosing features from the "Feature Request Forum" and sharing this process widely with the community.

Typesetting / JATS

Several sessions were held to map current developments, coordinate partner efforts, and help PKP prioritize JATS roadmap plans. The ORE EU project was also analyzed. Strategically, the TC recommends prioritizing integrating a JATS workflow in the coming years.

Adopting New Software

The TC advocates for adopting FLOSS tools internally and externally, highlighting sustainability, openness, and collaboration. This supports ethical technology practices, community adoption, and organizational goals, reflecting PKP's ethos as well as its commitment to the commons, while enhancing sustainability and collaboration.

SOFTWARE DEVELOPMENT

3

LTS releases

(OJS / OMP / OPS 3.3.0-15, -16, AND-17)

Over
100

active software contributors

6

non-LTS releases

(3.4.0-0 through 3.4.0-5)

16

third-party plugins

3.4.0 translations in

68

Languages

3.4.0

OJS, OMP, OPS

Version release with major revisions

RESEARCH

Two significant changes have taken place in PKP's Research structures:

- As of January 2024, John Willinsky has stepped down as co-Scientific Director and Juan Pablo Alperin has continued as PKP's sole Scientific Director. That said, Willinsky very much remains involved and engaged in PKP's activities, including in our research program.
- The other change is the inauguration of [PKP's Research Affiliate Program](#) with 15 researchers. The program gives more prominence to those engaged in PKP's research efforts. Collectively, this group, working in intersecting ways with Dr. Alperin's [ScholCommLab](#), has been involved in a wide range of scholarly communications research.

PKP BEACON DATA

Work in 2023 builds on the [updated PKP Beacon Data](#) and the [earlier publication](#). These data have proven to be a rich source of information about the use of our software and the larger scholarly communications landscape.

Publication Facts Label

Continued work on the [Publication Facts Label \(PFL\)](#), the cornerstone of the Journal Integrity Initiative. PKP researchers conducted interviews and focus groups with authors, editors, journalists, and students, the results of which are being prepared for publication, and have already led to a redesign of the label.

Open Science

Other notable research efforts involve studies about various aspects of Open Science (OS), including the use of preprints by the media, OS policy, and OS discourses during the pandemic.

There are many exciting plans for research in 2024 with a new research program surveying OJS journals starting, continued investigation into databases like OpenAlex and OJS role within them, the potential of AI for automating JATS / HTML markup, and more.

PKP PUBLISHING SERVICES

462

Total clients

*Hosting and Support of
OJS, OMP, and OPS*

60

Countries

*Distribution of clients
worldwide*

6

New team members

*Expanded support for
client services, systems
and sales*

OCS-to-OJS Conversion Toolset

With the depreciation of Open Conference Systems (OCS), our Systems Team developed a toolset that supports the migration of conference proceedings from OCS 2.3.x to OJS 3.3.0.

Stanford University Press

Publishing Services [announced in November 2023](#) a new collaboration with Stanford University Press (SUP) to support the development of their open access journal publishing program using Open Journal Systems (OJS). Hosting, support, and training for SUP journals will be provided by PKP Publishing Services.

Custom Development

Our thanks once again to the University of Minnesota (UMN) Libraries Publishing Services, for sponsoring the custom development of a new OJS theme featuring a cleaner design with focus on accessibility. The [UMN theme](#) is now publicly available on [GitHub](#).

COMMUNITY

This year, in our ongoing efforts for financial sustainability, we've revised our [membership](#) fee structure to:

- better accommodate our extensive global community;
- provide clarity on contribution amounts based on regional economic and institutional capacity;
- highlight values-aligned service providers (e.g., hosting, publication services, etc.);
- provide clarity on future inflationary increases so that libraries can plan for fair, predictable and transparent increases to fees;
- to establish a sustainable model that takes into account prevailing financial conditions, notably rapid inflationary pressure on the cost of expert staff and essential services.

Milestones of the Community Team during 2023

- We reinforced our message that regardless of whether your library or institution uses PKP software, it undoubtedly serves students and scholars who benefit from the research articles that PKP played a critical role in making openly available.
- We welcomed our newest Development Partner, [Sachsenkonsortium](#), whom we've partnered with to explore open peer review.
- This year marked our 12-year Development Partnership with the [University of Pittsburgh's Library System](#).
- Seven universities joined PKP's membership program.
- Thanks to funding provided by [ORCID's Global Participation Fund](#), PKP's Urooj Nizami visited Indonesia to meet with our largest user community, this experience allowed gaining valuable insights into the robust support system for scholarly journal publishing in Indonesia. This trip signifies our initial efforts at engagement, with many more initiatives planned for the years ahead.
- [Looking ahead](#), we remain steadfast in our mission of increasing access, quality, and diversity of scholarship globally.

Communications

PRESENT IN
28
EVENTS

500+
Engaging followers
via
Mastodon

277,000+
Website visits

6
Coalition Publica
webinars

66
media
mentions

4
In-person
events

Coalition Publica

COALITION
PUBLICA

2018

Coalition Publica is born - a partnership between Érudit and PKP

2020

SSHRC's Pan-Canadian Knowledge Access Initiative funds CP

2022

Canadian Foundation for Innovation renews CP funding.

TODAY

CP provides services for journals and libraries, such as the Partnership for Open Access, and data for researchers

FINANCIAL AND OPERATIONS

PKP's finances are based on multiple revenue streams to ensure maximum stability throughout the fiscal year and beyond.

Critical revenue comes from funders such as the Canadian Foundation for Innovation and the Social Sciences and Humanities Research Council as part of our Coalition Publica partnership with Érudit at the Université de Montréal. PKP was also thankful to receive an ORCID Global Participation Grant, funding our growing relationships with Indonesian institutions, where the greatest number of OJS journals in the world are.

We also receive generous financial support from our Development Partners and Institutional Members. In addition, the revenue generated by our Publishing Services team continues to grow, as more clients join us and receive the benefits of our staff's deep expertise in our software.

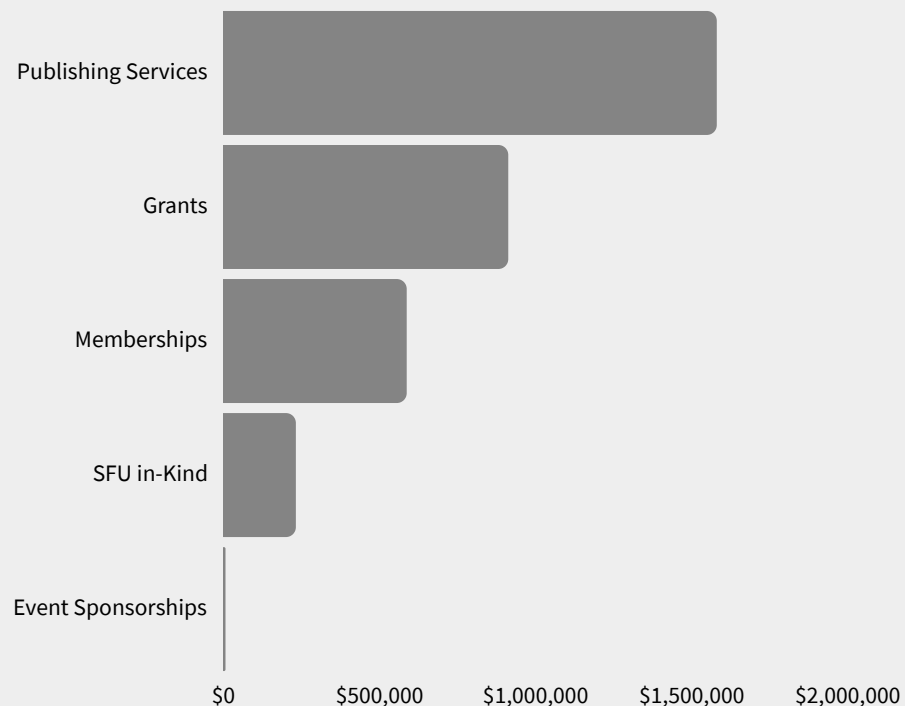
Many of our funders, Development Partners, members, and clients have been supporting PKP for many years, and we gratefully acknowledge their long-term commitment to our work and to our shared vision of a fully open access future.

PKP funding is used to do our work and grow our team, which now includes over 40 full and part-time members: software developers, system administrators, support specialists, researchers, librarians, communication experts, students, coordinators, managers, and directors.

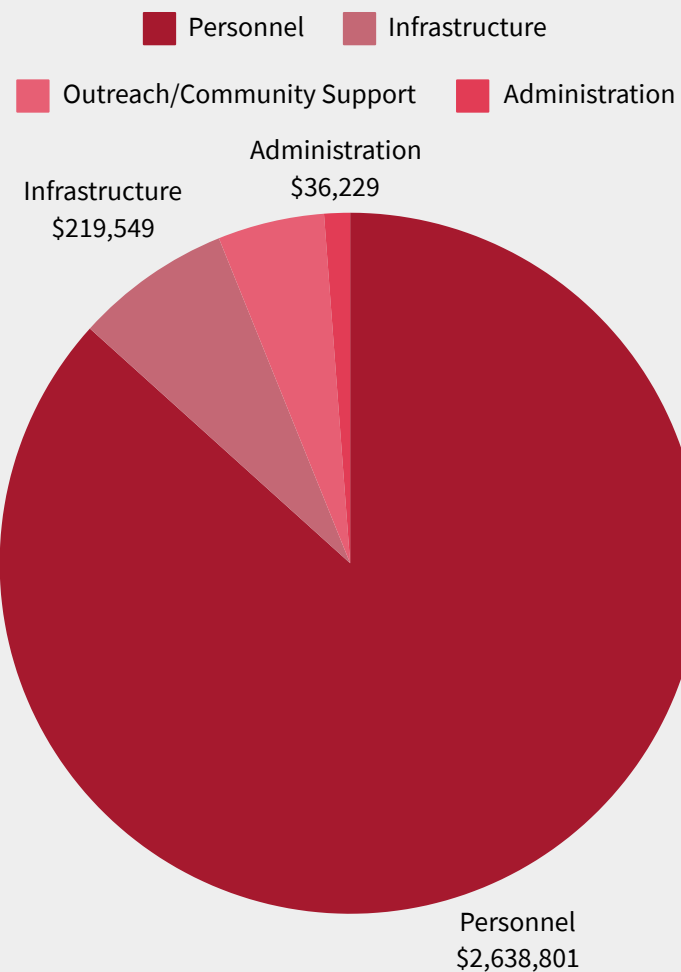
As a fully remote team, PKP staff are increasingly [located around the world](#), working in communities that reflect the wide variety of countries that use our software. Our people's hard work, commitment, and expertise are at the heart of PKP's success.

As a [research facility at Simon Fraser University](#), our home since 2005, PKP is thankful for its ongoing support, utilizing its financial management system, and adhering to all standard budget procedures, policies, and best practices of a major public sector organization.

Revenue



Expenses



\$3,312,169
Total revenue

\$3,044,379
Total expenses

\$267,790
Surplus

\$1,739,201
Total Reserve Funds

The fiscal year is April 1, 2023 - March 31, 2024. All budget amounts are in Canadian dollars.

OUR MEMBERS



DEVELOPMENT
PARTNERS



FINANCIAL
CONTRIBUTORS



THANK YOU FOR HELPING US MAKE KNOWLEDGE A GLOBAL PUBLIC GOOD

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This report has been written with contributions from:

Alec Smecher, Alejandra Casas, Dugan O'Neil, Emma Uhl, Famira Racy, Fiona Hong, Jeanette Hatherill, Juan Pablo Alperin, Kevin Stranack, Marc Bria, Marco Tullney, Marisa Tutt, Mark Huskisson, Sonya, Betz, Urooj Nizami

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Jason Nugent, Emma Uhl, Carolina Tinagushi, PKP staff



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Public Knowledge Project
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