Beyond the oligopoly: Scholarly journal publishing landscapes in Latin America and Europe

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Abstract: Global scholarly publishing is often described as being dominated by international commercial publishers, particularly those indexed in Web of Science and Scopus. However, this perspective overlooks the diversity of journal ecosystems, especially in non-English-speaking countries. This study examines scholarly journal publishing in seven countries across Europe and Latin America – Argentina, Brazil, Colombia, Finland, Mexico, Poland, and Turkey – using ISSN Center data and national sources. We categorize publishers according to their institutional and organizational characteristics and assess their coverage in WoS, Scopus, and OpenAlex. Our findings show that educational institutions are the dominant publishers in most countries, accounting for over 75% of journals in Colombia and Brazil and over 50% in Mexico, Argentina, and Poland. Finland is an exception, where scientific and professional associations lead (62.0%). Commercial publishers play a minor role, with their highest shares in Turkey (12.1%) and Poland (8.2%). Regarding database coverage, OpenAlex indexes over 50% of journals in most of the covered countries, while WoS and Scopus index only a small fraction. These results challenge the assumption of a globally uniform publishing system and highlight the need for bibliometric research to consider ways to improve the use of data sources and analysis methodologies so that national publishing structures are also included.

Keywords: journal publisher, scholarly publishing, database coverage, OpenAlex, Web of Science, Latin America, Europe

1. Introduction

Global scholarly publishing is often portrayed as being dominated by a small group of very large international commercial publishers – commonly referred to as the "oligopoly" (Larivière et al., 2015; Butler, Matthias, Simard et al 2023). The increasing concentration of academic publishing in the hands of a few multinational corporations, such as Elsevier, MDPI, Springer Nature, Wiley, and Taylor & Francis, has been extensively documented in bibliometric studies, policy reports, and discussions on open science. Although this oligopoly of commercial publishers still dominates the value regime in academia, this prevailing narrative is primarily derived from analyses based on Web of Science (WoS) and Scopus, which largely exclude vast segments of scholarly communication taking place outside

these databases. This study challenges the perception of a uniform global publishing landscape by focusing on the journal ecosystems of Latin America and Europe, providing evidence from seven countries: Argentina, Brazil, Colombia, Finland, Mexico, Poland, and Turkey. We argue that when examining scholarly publishing through national databases and data from the ISSN center – rather than relying solely on WoS or Scopus – a more diverse and nuanced picture emerges. In many non-English-speaking countries, educational institutions, learned societies, and research institutions play a central role in journal publishing, maintaining non-profit and community-driven scholarly communication models.

The resilience of these publishing structures, attached to the original purpose of scholarly communication, seems related both to the institutional support they have received and to the survival of national and regional publishing circuits fed by multilingual audiences. This is particularly evident in Latin America, where open-access initiatives are deeply embedded in national policies (Rico-Castro & Bonora 2023), and in parts of Europe, where universities and learned societies remain central actors in academic journal publishing (Armengou et al 2023). This study reveals patterns that challenge the widely accepted yet often oversimplified assumption that commercial publishers are the dominant forces shaping global scholarly communication.

So far, bibliometric studies of the global scholarly communication landscape have largely prioritized article- or journal-level analyses, whereas investigations at the publisher level remain less common (Taskin et al., 2025, Butler et al., 2023, Digiampietri, L. et al., 2024). However, more studies focusing on the publisher level would be what is needed to gain a better understanding of the institutional and governance aspects which are important for a well-grounded understanding of the publishing landscape that the organisations create through their activities. Two main approaches have been used in publisher-level studies: one relying on centralized international bibliometric databases, and the other analyzing global, regional, or national lists of journals.

The first approach – based on international databases such as WoS and Scopus – has provided insights into publishing trends but offers a skewed perspective by prioritizing internationally visible journals, predominantly in English and STEM disciplines (Larivière et al., 2015). The development of more inclusive open databases, such as OpenAlex, has broadened the picture of journal publishing beyond commercial indexing systems (Culbert et al., 2025). However, even these sources have limitations, particularly regarding DOI availability and use across different regions and languages.

The second approach focuses on journal databases produced and maintained at the national or regional level. Global sources such as the international ISSN center or Ulrichs' Periodicals Directory offer comprehensive listings of journals, but distinguishing peer-reviewed scholarly titles remains challenging (Laakso & Multas, 2023). Some databases, such as DOAJ, cover only open-access journals, while many countries maintain national lists that aim to include all scholarly journals published within their borders (Pölönen et al., 2021). Studies focused on specific countries, such as Australia or Finland, have provided valuable insights into their respective publishing landscapes (Late et al., 2020; Jamali et al., 2022).

Recent study has also challenged the narrow international focus of scholarly publishing analyses. Khanna et al. (2022) examined over 25,000 journals using Open Journal Systems (OJS), revealing that the majority are based in the Global South and operate under the diamond open-access model, which eliminates fees for both authors and readers. These journals publish research in over 60 languages, covering diverse disciplines, yet remain largely invisible in international citation databases, with only 1.2% indexed in Web of Science and 5.7% in Scopus. This disparity highlights the limitations of commercial bibliometric infrastructures in capturing the full breadth of global scholarly publishing. Their findings reinforce the importance of regional, national, and open bibliographic databases in

guaranteeing a more inclusive representation of research, particularly for journals serving non-English-speaking and regionally focused academic communities.

This observation connects to a broader theoretical debate about how scholarly journals are categorized and valued. Often, journals deemed "international" are simply those indexed by commercial databases and associated with high Journal Impact Factors, which are assumed to reflect global relevance or quality. However, this assumption has been increasingly questioned. The commercial evolution of academic publishing and the co-optation of open access – through transformative agreements or direct Article Processing Charges (APCs) – have reinforced segmented circuits of recognition based on journal prestige, often disconnected from research quality (Beigel, 2024). These circuits, shaped by mainstream indexes and rankings, have undermined the traditional scholarly editorial model by replacing the role of academic editors with market-driven processes, such as mega-journals and algorithmic manuscript screening.

In this context, the role of academic editors and the publishing autonomy of scholarly institutions become critical for safeguarding research quality and academic independence. The classification of publishers, which is a central methodological dimension of our study, intersects with these debates. By focusing on publisher types and their governance structures, we aim to expose how national and non-commercial publishing models continue to sustain editorial autonomy and diverse scholarly communication practices – often marginalized by the prevailing definitions of journal excellence.

Our study seeks to advance knowledge about the publisher landscape by conducting a comprehensive analysis of journals published in seven European and Latin American countries. These journal ecosystems are poorly covered in WoS and even in open bibliometric databases like OpenAlex. This limited coverage is not merely a consequence of language barriers. While many journals in these countries are published in the dominant national languages (which are not English), their marginalization in international databases results primarily from selective indexing practices that favor journals aligned with commercial publishers, large-scale citation networks, or particular institutional relationships (Chavarro, Rafols, & Tang, 2018; Suárez-Tamayo et al., 2018). These practices systematically exclude a substantial portion of high-quality, peer-reviewed journals that serve local and regional scholarly communities and contribute to knowledge accreditation in diverse fields. Our goal is to understand how national publishing landscapes differ from the international journal publisher ecosystem that has emerged from studies based primarily on WoS and Scopus.

This study also contributes to the ongoing global debate on the limitations of international bibliometric sources and the need for more inclusive and diversified data infrastructures. By adopting a "bottom-up" approach – building the dataset through national sources and empirical surveys – we challenge the dominance of top-down perspectives shaped by selective international databases. Our methodology highlights the importance of incorporating national bibliographic records, local expert knowledge, and context-sensitive classifications to achieve a more accurate and comprehensive understanding of scholarly publishing. This approach not only addresses the visibility gap for non-English-language journals but also promotes methodological pluralism and recognizes the diversity of scholarly communication practices across regions. In doing so, we provide an empirical model that can inform future comparative studies and contribute to the broader movement contributing to fairer and more representative research assessment practices.

In this study, we address the following research questions:

1. How has the number of active journals evolved over time in the seven countries included in the study?
2. What types of publishers operate in these countries, and how does their role vary across different national contexts?

3. To what extent is the publishing of scholarly journals in these countries concentrated among a few dominant publishers?
4. What is the total number of scholarly journals published in the seven studied countries, and how are they covered in international and open bibliometric databases?
5. How do the indexing rates of different publisher types vary across bibliometric databases?

While this study provides a comprehensive analysis of journals published within the seven selected countries from a publisher-centric perspective, certain aspects of journal characteristics – such as open access (OA) status, research disciplines, audiences, and languages of publication – are not directly examined. These dimensions are undoubtedly relevant to understanding the broader dynamics of scholarly publishing, particularly in relation to accessibility, subject specialization, and linguistic diversity. However, the available dataset does not include systematic metadata on these attributes across all seven studied countries. Given the challenges in harmonizing such information across multiple national sources, we focus here on the fundamental attributes of journal publishing, including the number of journals, their publisher types, and their coverage in bibliometric databases. Future research should further explore how OA models, disciplinary specializations, and language diversity intersect with publishing ecosystems in these countries and influence the visibility of journals in international indexing systems.

2. Materials and methods

This study examines the scholarly publishing landscape across seven countries by integrating data from multiple publicly available sources. Our methodological approach consists of three key stages: (1) compiling a comprehensive database of scholarly journals, (2) classifying publishers based on an adapted Latindex framework, and (3) standardizing publisher names to ensure comparability. The dataset was constructed by consolidating ISSN metadata with records from bibliographic databases, applying rigorous deduplication procedures, and verifying publisher affiliations.

Given that the classification process required in-depth knowledge of national publishing systems, our research team included experts from each country who manually reviewed and standardized the data. The following subsections describe the data collection process, classification framework, and data processing techniques in detail.

2.1. Preparing the database of scholarly journals

To analyze the scholarly journal landscape in the selected countries, we compiled a dataset integrating ISSN data and records from seven publicly available sources as of March 2024: Crossref, Bielefeld Academic Search Engine (BASE), Ulrich's Periodicals Directory, PKP (Public Knowledge Project), Scopus, JUFO (Finnish Publication Forum), and DOAJ (Directory of Open Access Journals).

The other sources were used to identify as many peer-reviewed journals in the countries as possible, for which uniform metadata was gathered from ISSN to compile the final dataset. A detailed explanation of the dataset construction is available in the work by Laakso and Pölönen (2023).

The initial exploration was based on ISSN listings, but the final selection of journals for the analysis was validated against national sources to accurately determine the currently active journals. This approach represents a key contribution of our study to the broader global discussion on data sources and their reliability. For Colombia, we included only journals indexed in the national Publindex database, as

these are officially recognized scientific journals. In the case of Poland, we relied on ARIANTA, the most comprehensive and up-to-date national database of Polish scholarly journals. The situation in Argentina exemplifies the challenges we address: the national ISSN registry is severely outdated, prompting us to conduct an empirical survey to identify active scholarly journals (Beigel, Salatino & Monti, 2022).

As a result, the final dataset contained 178,902 unique serials (globally, and 18,061 for the seven analyzed countries), deduplicated based on their ISSN-L.

Given that the sources we utilised primarily collect metadata on scholarly journals, we assumed that our database consists mainly of scholarly journals and is suitable for analyzing the structure of the publishing landscape. Since journals appeared in multiple databases and ISSN-L was not always

assigned alongside with ISSN / EISSN, we applied an additional deduplication process: (1) each journal was assigned a unique identifier and dataset was transformed into a long format, where each identifier (ISSN-L, ISSN, EISSN) was stored in separate rows; (2) Journals sharing an identifier were grouped together to ensure that each journal appeared only once in the dataset.

We focused exclusively on active scholarly journals with clearly documented starting years and no identified termination date. However, this working definition of an active journal does not guarantee that all journals included in the analysis and labeled as active actually published issues in 2023 or 2024.

Table 1. Number of active unique journals per country.

Country	Number of journals
Argentina	1,253
Brazil	5,640
Colombia	428
Finland	387
Mexico	777
Poland	3,134
Turkey	3,434
Total	**15,053**

As indicated in Table 1, the final dataset comprised 15,053 journals from seven countries with confirmed ISSNs and verified metadata, ensuring consistency across sources.

2.2. Classification of publishers

To systematically analyze the academic publishing landscape, we categorized journal publishers using a structured classification model. Our study focuses on countries where at least one of the co-authors is affiliated, ensuring detailed knowledge of the local publishing market.

As a starting point, each publisher was assigned to one of seven predefined categories, following the classification framework established by Latindex: (1) Scientific or professional associations, (2) Research institutions, (3) Independent editors, (4) Commercial publishers, (5) Educational institutions, (6) Governmental institutions, (7) International institutions.

To maintain comparability across countries, the research team thoroughly discussed the classification categories and conducted calibration sessions before applying the classification scheme.

A key aspect of publisher classification was determining whether a journal was managed by a single organisation or in collaboration between multiple publishers. Table 2 presents the number of unique publishers, the share of journals published by a single publisher versus those managed by multiple publishers in each country. The results show that, in most countries, single-publisher journals dominate, comprising 94.48% of all analyzed journals.

Table 2. Number of publishers and share of journal publishers by single and multiple entities per country.

Country	Number of Publishers	Single Publisher Journals	Multiple Publishers Journals
Argentina	613	100.00%	0.0%
Brazil	2,013	100.00%	0.0%
Colombia	168	97.90%	2.10%
Finland	333	91.21%	8.79%
Mexico	397	89.83%	10.17%
Poland	1,739	85.77%	14.23%
Turkey	2,218	96.42%	3.58%
Total	**7,481**	**94.45%**	**5.55%**

Subsequently, we assigned a final classification to each journal, considering cases where multiple entities were responsible for publishing a journal. To account for these collaborative cases, we introduced four additional categories: (8) Commercial and other(s), (9) Educational and other non-commercial(s), (10) Governmental institution and other non-commercial(s), (11) Other composition of non-commercial publishers.

To calculate the share of publishers by the number of journals, we first identified the unique publishers. Each publisher was categorized based on the number of journals they publish, using the following bins: 1 journal, 2 journals, 3–5 journals, 6–10 journals, and more than 10 journals. We then computed the percentage of publishers in each category within a given country by dividing the number of publishers in each bin by the total number of publishers for that country.

2.3. Standardization of publisher names

To analyze market concentration and publisher output accurately we standardized publisher names within each country. Since ISSN metadata often contains inconsistencies – such as duplicated records variation between different records for the same organisation due to minor spelling differences or multiple languages used, formatting discrepancies, or multiple institutions grouped within the same metadata field – manual standardization was required to ensure data accuracy and comparability across countries.

The standardization process was carried out manually by the co-authors responsible for each respective country, leveraging their expertise and familiarity with the local publishing landscape. Using ISSN metadata from fields 260, e_260, 710, e_710, 720, and e_720, each researcher reviewed and harmonized publisher names to eliminate redundancies and unify institutional variations. This expert-driven approach was essential for maintaining the integrity of the dataset, as automated methods would have been insufficient to account for the nuances of national publishing systems.

The number of institutions linked to each journal varied significantly across countries due to differences in how ISSN databases structure their metadata. In Poland, journals had an average of 5.96

institutions recorded per journal, whereas in Brazil, this number was much lower, at 1.80 institutions per journal. These differences reflect the diverse ways in which national ISSN centres register publisher affiliations.

For journals published by educational institutions, we adopted a standardized approach: all journals affiliated with faculties or departments of a given university were consolidated under the parent university. This decision prevented artificial fragmentation of university publishers and guaranteed greater consistency in the classification process.

2.4. Limitations of the study

We would like to acknowledge several limitations of this study that should be considered when interpreting the findings. These limitations stem primarily from the nature of the data sources, methodological choices, and the scope of our analysis.

First, the quality and consistency of data from the ISSN Center depend on national agencies, which may lead to significant variations between countries. Differences in data registration practices and levels of completeness can impact the accuracy of journal metadata, including the number and type of organizations identified as publishers. This heterogeneity introduces a degree of uncertainty when comparing national publishing landscapes.

Second, our definition of active journals – those with clearly documented starting years and no identified termination date – does not necessarily imply that all journals classified as active have recently published issues. Some journals may remain listed as active despite a lack of recent publications, particularly in cases where formal deactivation is not recorded in databases. This limitation is inherent to studies based on registry data rather than direct verification of journal activity.

Third, the classification of publisher categories, despite extensive discussions among co-authors, posed challenges typical of such exercises. Certain categories were more ambiguous than others, requiring context-sensitive decisions. For example, in Poland, numerous scholarly journals are published by local governments or museums, which are not standard academic publishing entities. After deliberation, we categorized these journals under Research Institutions to maintain consistency across the dataset. While this approach enhances comparability, it may differ from classifications used in other bibliometric analyses.

Fourth, in addition to ISSN data, we incorporated supplementary national databases, such as Publindex (Colombia) and ARIANTA (Poland), and empirical surveys (Argentina) to improve data coverage and accuracy. However, the availability and comprehensiveness of such resources vary significantly across countries. Some countries lack equivalent national registries, leading to potential underrepresentation of their journal ecosystems in our dataset.

Fifth, the selection of countries analyzed in this study was guided by the expertise and research backgrounds of the co-authors. While this ensured in-depth knowledge of national publishing systems, it also introduced a selection bias. Our study covers only a limited number of European and Latin American countries, and we deliberately refrained from making broad generalizations about entire regions. A more comprehensive global analysis would require expanding the dataset to include additional national publishing systems.

Finally, this study focuses on the structural characteristics of scholarly journal publishing, including publisher types and database coverage. It does not examine other important dimensions, such as disciplinary composition, open-access status, or language diversity. While these factors are crucial for understanding scholarly communication, they require specialized metadata that is not uniformly

available across the studied countries. Future research should address these aspects to provide a more holistic view of the journal publishing landscapes in these countries.

Despite these limitations, we believe that our study offers valuable insights into national scholarly publishing ecosystems through the lenses of publishers that are often overlooked in international bibliometric analyses.

3. Results

This section presents an analysis of the scholarly journal landscape across the seven studied countries, focusing on three key aspects: trends in the founding of new journals, the categorization of publishers, and market concentration.

First, we examine the historical development of journal markets in the analyzed countries, identifying periods of accelerated growth and structural shifts in journal creation. Next, we explore the distribution of publishers across different institutional categories, highlighting the dominant publishing entities in each country. Later, we assess the degree of market concentration by analyzing the number of journals managed by individual publishers, shedding light on the extent of fragmentation or consolidation in national publishing systems. Finally, we analyze the database coverage and investigate what share of journals included in our analysis are indexes in main international databases, that is Web of Science, Scopus, and OpenAlex. These analyses provide a comparative perspective on the evolution and composition of academic publishing across diverse geopolitical and institutional settings.

3.1. Trends in the founding of new scholarly journals

The analysis of the founding years of scholarly journals active up to now across the seven studied countries reveals significant differences in the development of national publishing landscapes. While the first journals in these countries appeared as early as the 19th century, their growth remained slow until the mid-20th century. Brazil, Finland, and Poland had individual journals already in the 19th century, whereas Turkey, Colombia, and Mexico experienced more noticeable development at a later stage. Poland shows a consistent emergence of new journals since the late 19th century (Kulczycki et al. 2019), indicating a relatively stable publishing tradition.

As Figure 1 shows, following World War II, a distinct acceleration in the number of newly founded journals became evident, particularly in Poland, Mexico, and Brazil. This growth can be linked to the post-war reconstruction of academic institutions and the increasing role of scientific research. Between 1950 and 1980, journal establishment trends varied by country. Finland and Colombia maintained a moderate pace of growth, whereas Brazil and Turkey experienced a gradual increase in the number of new journals.

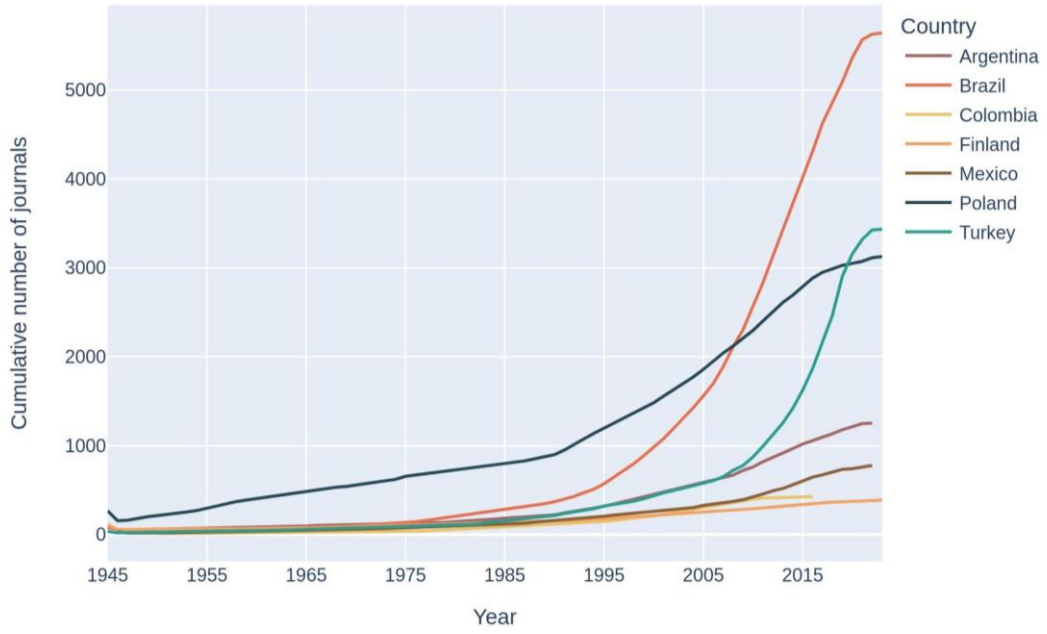

Figure 1. Cumulative number of (active up to now) scholarly journals across countries.

A more pronounced expansion occurred from the 1990s onwards. Brazil, Poland, and Turkey witnessed a rapid increase in the number of journals, albeit driven by different underlying dynamics. In Poland, this growth was closely linked to the post-socialist transformation and integration into the global research economy, which intensified the pressure to publish in scholarly journals. Turkey's expansion, while similarly notable, has been shaped by the volatile and often rapidly changing structure of its research evaluation system, which increasingly privileges quantifiable research outputs. As Şener et al. (2025) argue, metric-based evaluation frameworks in Turkey and Colombia have acted as gatekeeping mechanisms, particularly affecting early-career researchers and fostering a journal proliferation geared toward meeting formal productivity indicators rather than long-term editorial sustainability. Mexico also exhibited upward trends during this period, albeit at a slower pace than Brazil and Turkey.

The 21st century marked the most dynamic phase of journal expansion in nearly all the studied countries, as shown in Figure 2. The surge in new journal foundations after 2000 can be attributed to the rise of open access initiatives, the widespread digitization of publishing workflows, and the growing influence of research evaluation systems that increasingly reward publication volume. Brazil, Turkey, and Poland recorded the most substantial increases, while Mexico and Finland showed a more moderate yet steady rise. In Turkey, the period after 2010 witnessed an especially sharp increase, which coincided with major reforms in higher education and a shift toward performance-based academic evaluation criteria, as documented by Şener et al. (2025). These reforms incentivized institutional actors and independent editors alike to launch new journals as a means of navigating the metrics-oriented publishing environment.

However, it is noteworthy that this expansion trend appears to have peaked. In all countries, the number of newly founded journals per year has declined since around 2010, suggesting a saturation point or a structural shift in the scholarly publishing ecosystem. While part of this decline may be due to delays in the registration of new journals with the ISSN system – particularly for recently established titles – the downward trend is pronounced and consistent across the countries examined. This suggests that national journal publishing systems may be entering a phase of consolidation or increased selectivity, potentially driven by stricter quality control, resource limitations, or the maturation of national publishing infrastructures. While our study focuses on active journals and does not systematically track discontinued titles, future research might explore whether this decline correlates

with an increase in journal closures, offering further insights into the lifecycle of scholarly journals within different national contexts.

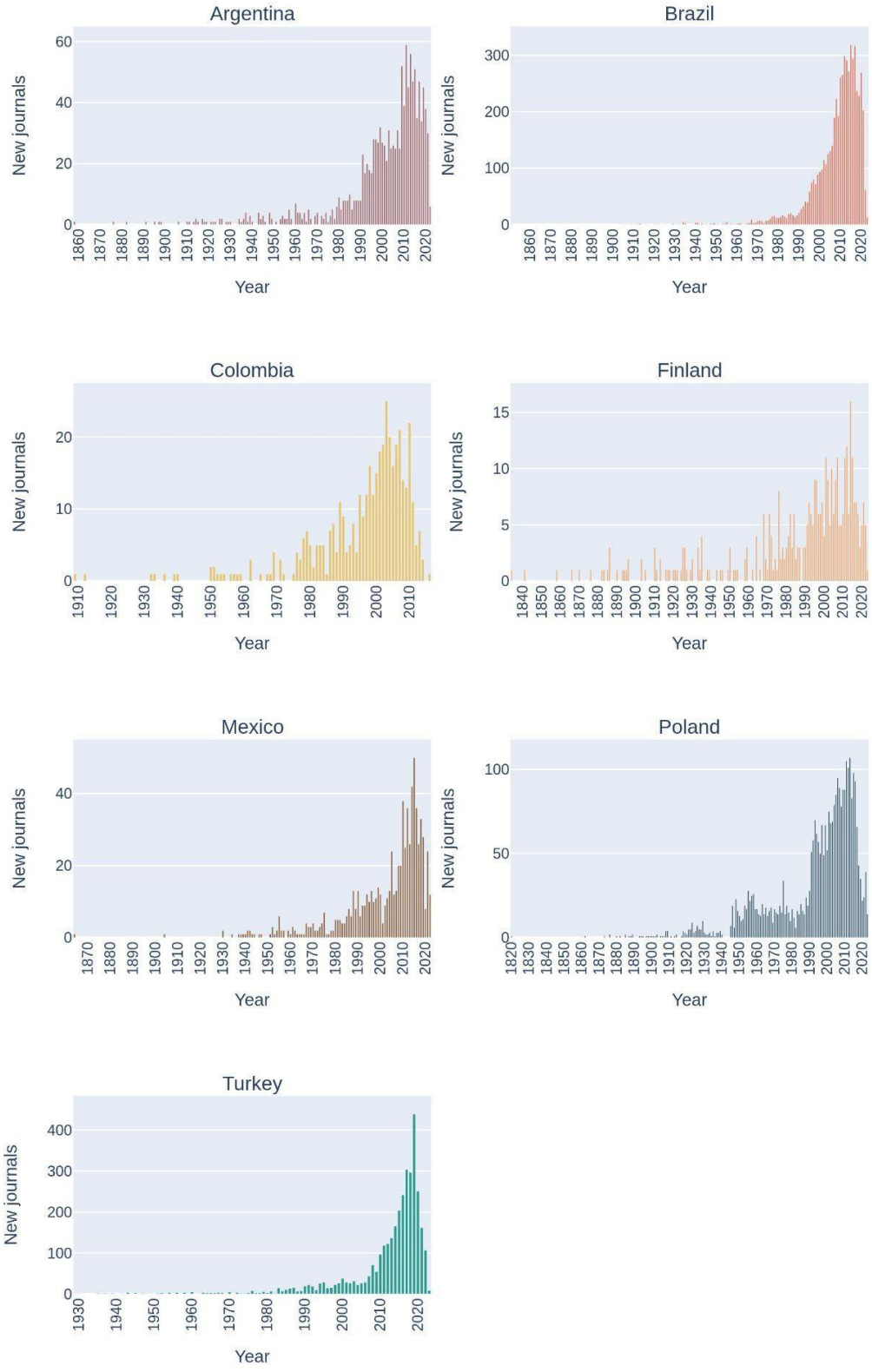

Figure 2. Number of new scholarly journals founded each year by country.

When examining the distribution of founding years for active journals, we observe a clear temporal shift in journal creation. Across most countries, approximately 25% of currently active journals were established before 1980, another 25% between 1980 and 1999, and an additional 25% between 2000 and 2009. This means that roughly 75% of all active journals were founded before 2010, with the remaining 25% emerging in the most recent decade. The most striking growth was observed in Brazil and Turkey, reflecting a strong expansion of their academic publishing ecosystems in the 21st century. In contrast, Finland and Colombia showed a more balanced and gradual trajectory, with a smaller share of their current journals established after 2000.

3.2. Categories of publishers

Figure 3 illustrates that the distribution of journal publishers across different categories varies significantly among the analyzed countries. However, what should be highlighted here, in all except one country, the dominant category of publisher (when analyzed the overwhelming majority of journals published by single publishers) is educational institutions as it is illustrated in Figure 4.

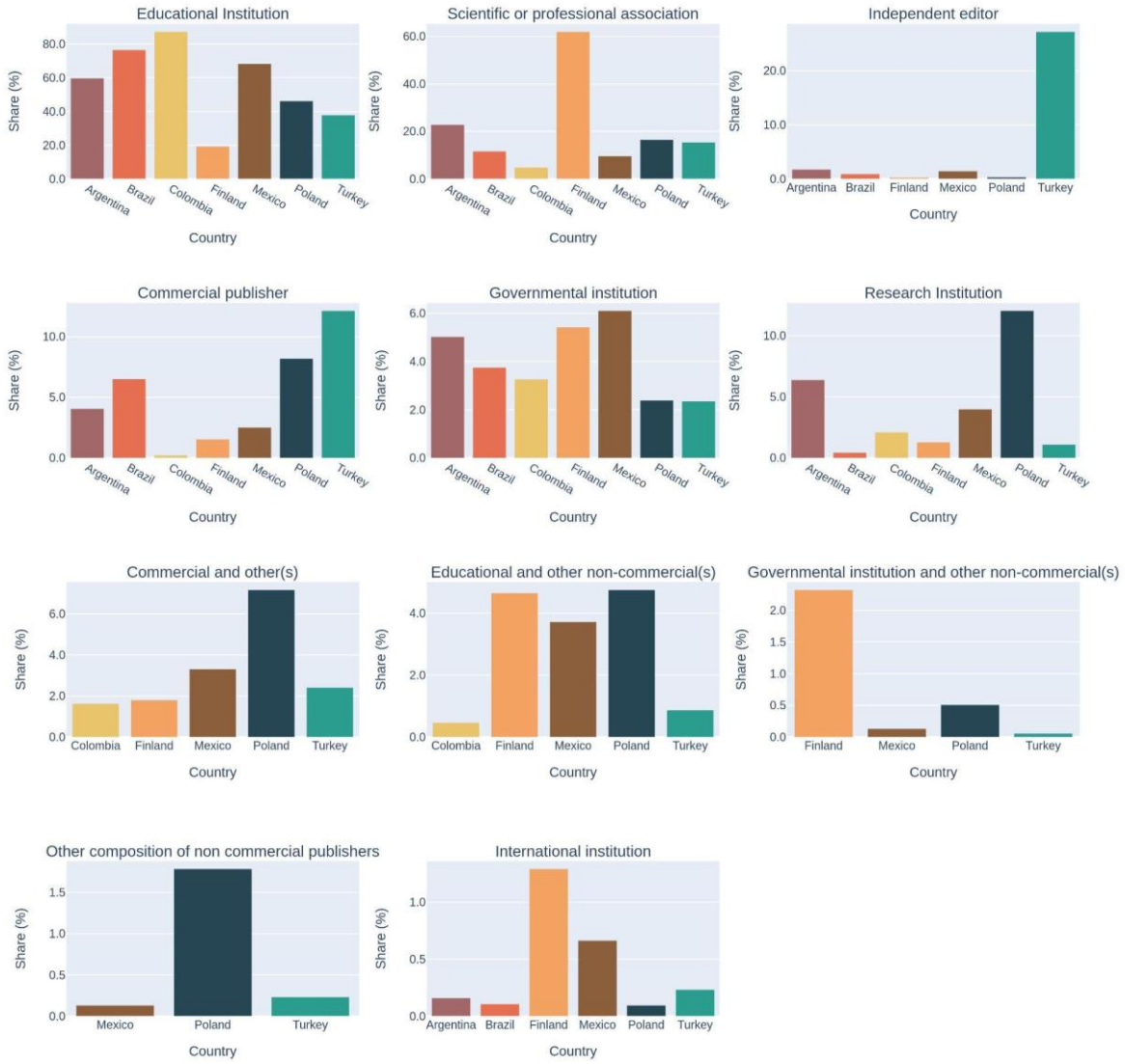

Figure 3. Share of journals published by publisher category per country.

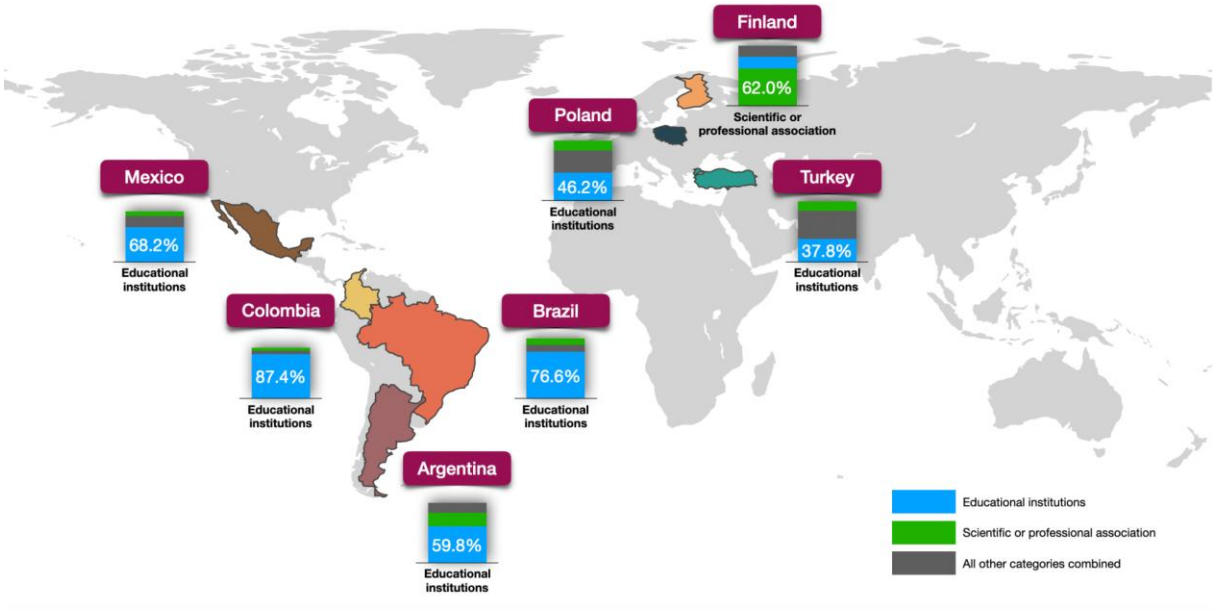

Figure 4. Dominant publisher category per country.

Educational institutions emerge as the dominant journal publishers in most cases. Their highest share is observed in Colombia, where they are responsible for 87.4% of journals, followed by Brazil (76.6%), Mexico (68.3%), Argentina (59.8%) Turkey (37.9%), and Poland (46.2%). In contrast, their presence in Finland is much smaller (19.4%), where other entities, particularly scientific or professional associations, take the lead.

Scientific or professional associations play a particularly important role in Finland, where they publish 62.0% of all journals, making them the largest category in the country. This trend is also strong Argentina (22.8%), in Poland (16.5%), Turkey (15.4%), Brazil (11.6%), and Mexico (9.7%), suggesting that professional organizations remain key actors in scholarly publishing across different regions.

Commercial publishers hold a notable share in Turkey (12.1%) and Poland (8.2%), where private-sector entities are more engaged in academic publishing. This contrasts with Finland (1.6%), Colombia (0.2%), and Mexico (2.5%), where commercial entities have a much smaller presence. Argentina (4.07%) and Brazil (6.5%) also show a relatively low share of commercial publishers, indicating a stronger reliance on publicly funded or non-commercial models.

Independent editors, who typically represent individual scholars or small publishing initiatives, play a highly significant role in Turkey, where they are responsible for 27.3% of all journals. This level of independent publishing is unmatched in the other analyzed countries, where their presence is marginal (Argentina 1.7%, Mexico 1.5%, Brazil 0.9%, Poland 0.3%, and Finland 0.26%), or nearly non-existent (Colombia 0%). In the Turkish context, these independent editors are often affiliated with universities but manage and publish journals outside formal institutional structures. While this model fosters editorial autonomy and responsiveness to niche scholarly communities, it also raises concerns about sustainability. Since such journals often depend heavily on the personal initiative of a single academic editor, they may face discontinuation if the editor steps down or institutional support is lacking.

Governmental institutions have varying levels of influence, with Argentina (5.02%), Brazil (3.8%), Mexico (6.1%), Colombia (3.3%), Poland (2.4%), and Turkey (2.4%) maintaining some degree of government-led publishing. In Finland, this figure rises slightly to 5.4%, reflecting a stronger role of state-affiliated journals.

International institutions do not play a major role at any country. In contrast, their share in Poland is 0.1%, Mexico (0.7%), Brazil (0.1%), and Finland (1.3%).

Research institutions show a particularly strong presence in Poland (12.0%), where they publish a significant portion of the country's scholarly journals. This category also has a moderate presence in Argentina (6.38%), Mexico (4.0%), but remains less prominent in Brazil (0.4%), Turkey (1.1%), and Colombia (2.1%).

Other combinations of publishers' collectives, such as "Governmental institutions and other non-commercial publishers," have their strongest representation in Brazil (3.8%) and Mexico (0.1%), highlighting collaborative publishing efforts between public and private entities.

The data reveals distinct national publishing ecosystems. Colombia and Brazil are heavily dominated by educational institutions, while Finland relies on scientific or professional associations. Turkey presents an unusual model, with a large share of independent editors. Poland and Mexico feature a more diversified publishing environment, balancing commercial publishers, educational institutions, and professional associations.

3.3. Market concentration

The distribution of publishers by the number of journals they produce varies significantly across the analyzed countries, reflecting different levels of market concentration. Figure 5 shows that most publishers in all countries operate only a single journal, indicating a highly fragmented market. However, the extent of this fragmentation differs between countries.

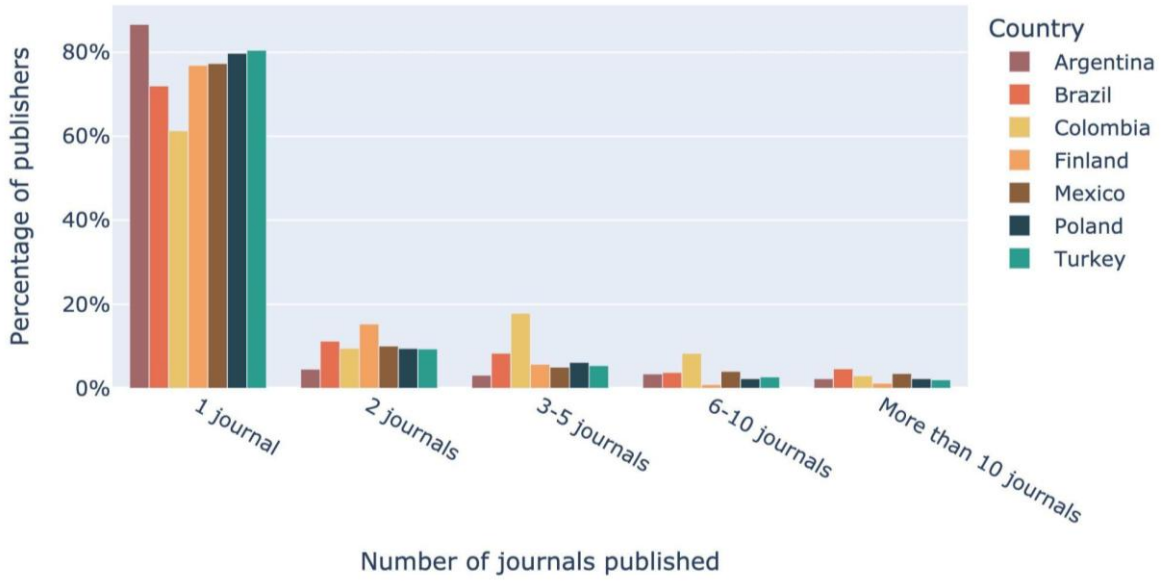

Figure 5. Share of publishers according to the number of journals in their national portfolio across countries.

In Argentina, Turkey, and Poland, small-scale publishers dominate the market. In Argentina, nearly 87% of publishers produce only one journal, the highest proportion among the studied countries. Similarly, in Turkey and Poland, 80% of publishers manage a single journal, suggesting a highly fragmented publishing landscape. In contrast, Brazil and Colombia exhibit a lower proportion of single-journal publishers, at around 72% and 61%, respectively, reflecting a more consolidated publishing ecosystem with a notable share of multi-journal publishers.

Medium-sized publishers (managing 3 to 5 journals) are particularly visible in Colombia, representing almost 18% of the country's publishers – the highest share among the analyzed countries. In Finland, this group accounts for nearly 6% of publishers, while in Mexico and Poland it represents around 5–

6%. These proportions illustrate the presence of mid-sized publishers that contribute to a more diversified market structure in these countries.

Despite the predominance of single-journal publishers, a minor share of publishers in all countries operate at a much larger scale, producing more than 10 journals. The highest share of these large publishers is found in Brazil (4.7%), followed by Mexico (3.5%) and Colombia (3%). In Finland and Turkey, this group accounts for approximately 1–2% of publishers, indicating the presence of major academic publishing houses. Poland and Argentina report a slightly lower share of large publishers, with about 2.3% each.

3.5. Databases coverage

The analysis of database coverage (Table 3) shows substantial variation in the indexing rates of journals across the seven studied countries. Web of Science (WoS) databases (AHCI, ESCI, SCIE, and SSCI) index only a small fraction of the total journal output. The highest overall coverage in WoS is observed in Colombia (28.74%), followed by Poland (11.42%) and Mexico (10.04%), while the lowest coverage is in Finland (4.65%) and Brazil (6.15%).The particularly high share of Colombian journals indexed in WoS may reflect the effects of national policy rather than solely the result of database selection. Although our dataset for Colombia includes only journals listed in Publindex, it is important to note that Publindex itself is shaped by national science policy, which explicitly encourages journals to be indexed in WoS and Scopus. ESCI has the highest inclusion rate among WoS databases, particularly in Colombia (25.93%), suggesting that many journals are recognized as emerging sources but have not yet reached the core citation indexes (SCIE/SSCI). This pattern may reflect not only national evaluation policies that promote inclusion in international indexes, but also the regional development strategies of Web of Science itself.

Table 3. Share of journals indexed in each database (index)

Country	Number of journals	AHCI	ESCI	SCIE	SSCI	WoS	Scopus	OpenAlex
Argentina	1,254	0.24%	6.78%	1.12%	0.24%	8.30%	7.26%	44.37%
Brazil	5,640	0.20%	4.40%	1.44%	0.18%	6.15%	6.60%	53.24%
Colombia	428	0.70%	25.93%	1.64%	0.70%	28.74%	26.87%	91.12%
Finland	387	0.26%	1.29%	2.58%	0.78%	4.65%	9.82%	24.03%
Mexico	777	0.26%	5.92%	2.83%	1.03%	10.04%	12.74%	58.30%
Poland	3,134	0.32%	6.54%	4.37%	0.29%	11.42%	17.84%	49.04%
Turkey	3,434	0.20%	6.09%	0.96%	0.23%	7.45%	7.80%	48.75%
All countries	15,053	0.25%	6.04%	2.02%	0.29%	8.53%	10.24%	51.19%

In contrast, Scopus exhibits slightly broader coverage, with the highest representation in Colombia (26.87%), Mexico (12.74%), and Poland (17.84%), while Brazil (6.60%), Argentina (7.26%), Turkey (7.80%), and Finland (9.82%) remain below 10%. However, the most extensive coverage is provided by OpenAlex. Most journals are indexed in this database in most countries, with particularly high representation in Colombia (91.12%), Mexico (58.30%), and Brazil (53.24%). In contrast, Argentina (44.37%), Turkey (48.75%), and Poland (49.04%) fall just below the 50% mark, while Finland has a substantially lower coverage (24.03%). These patterns highlight the role of OpenAlex in capturing a more diverse and locally relevant scholarly output, particularly in Latin America.

The heatmap in Figure 4 further illustrates database coverage, categorized by publisher type. The results reveal that commercial publishers and international institutions have the highest indexing rates across all databases, particularly in Scopus and OpenAlex. In contrast, educational institutions – the dominant journal publishers in most countries – exhibit lower inclusion in WoS and Scopus but relatively high representation in OpenAlex (54.9%). Similarly, scientific or professional associations (2,324 journals) have moderate indexing rates in ESCI and Scopus but stronger presence in OpenAlex (46.1%).

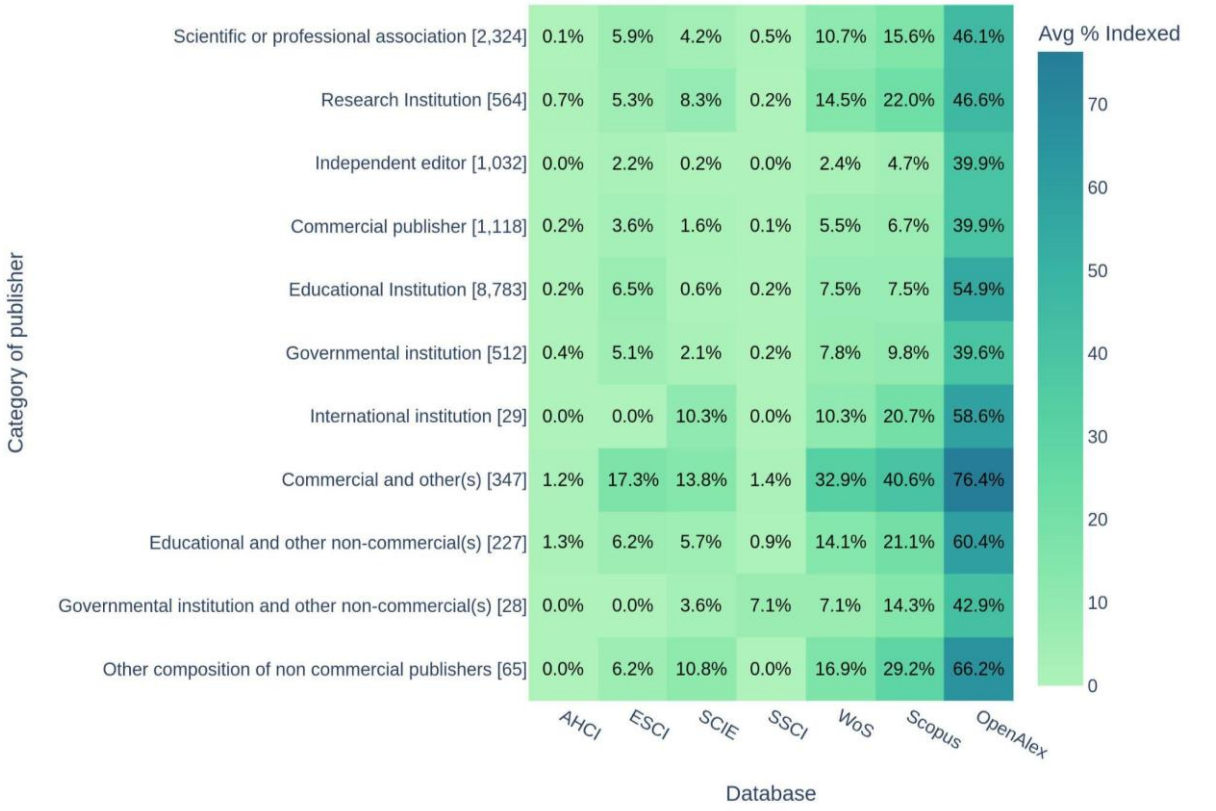

Figure 4. Share of journals indexed in databases by publisher category. The number of journals in each category is indicated in square brackets.

Independent editors and governmental institutions have significantly lower representation in international databases, with indexing rates often below 10% in WoS and Scopus. The lowest coverage is observed for governmental and non-commercial collectives, highlighting their marginalization in global citation databases.

4. Discussion and conclusions

Our findings challenge the prevailing narrative that a few commercial publishers dominate global scholarly publishing. While prior analyses based on selective indexes reinforced the perception of an oligopoly of large multinational publishers, examining diverse national contexts reveals a more pluralistic reality. In the seven countries studied, scholarly publishing is not uniformly controlled by corporate entities. Instead, it is largely driven by universities, research centers, and learned societies operating at national and institutional levels. This evidence undercuts the notion of a globally uniform publishing system shaped solely by commercial interests (Larivière et al., 2015). It shows that the

oligopoly narrative, derived mainly from Web of Science and Scopus data, overlooks extensive local publishing ecosystems sustained by academic communities. As a result, the dominance of elite commercial companies appears far less pronounced in Latin American and certain European contexts than the global narrative suggests (Butler et al., 2023). The landscape of academic journals is beyond the oligopoly: it is diverse and often grounded in public, academic-driven initiatives rather than market imperatives.

A striking pattern is the prominence of national and institutional publishing models in the countries analyzed, especially in Latin America and in Finland. Educational institutions (universities and colleges) are the primary publishers of scholarly journals in much of Latin America, accounting for well over half of the journal output in Argentina, Mexico, Brazil, and Colombia. For instance, public universities and research institutes publish the majority of journals in Brazil and Colombia, over three quarters of all titles in our data, illustrating the central role of academia in these countries' scholarly communication. In Mexico and Argentina, too, universities and scientific councils serve as the backbone of publishing, collectively producing a large share of journals.

In Europe, the landscape reveals distinct yet complementary patterns. Finland exemplifies a model where learned societies and professional associations dominate, producing about 62% of the country's journals. This model reflects a strong tradition of academic self-governance, supported through national frameworks like the Finnish Publication Forum, which values both local and international scholarly outputs. In Poland, although educational institutions remain central, there is a more pronounced presence of research institutes and learned societies, indicating a hybrid publishing environment. Turkey presents another distinctive European scenario, marked by a substantial proportion of independent academic editors and a relatively larger role of commercial publishers compared to other countries studied. This diversity within Europe itself underscores that scholarly publishing models are shaped significantly by research evaluation traditions, policy incentives, and academic cultures.

When comparing the Latin American and European contexts, several key differences and similarities emerge. Latin America has distinctly embraced institutional publishing driven by public universities, with journals often relying on public funding and academic volunteerism. Conversely, European countries like Finland emphasize professional associations and learned societies, which offer organizational stability and institutional legitimacy, yet similarly prioritize academic autonomy over commercial interests. Despite these differences, a critical commonality is evident: in both regions, scholarly publishing is deeply embedded in non-commercial environments. Such environments provide robust alternatives to the oligopolistic models prevalent in the Anglophone world, fostering localized scholarly communities, multilingualism, and diverse research agendas.

A key factor enabling this analysis was the use of a nuanced publisher classification system, which allowed us to discern the variety of publishing actors operating in each country. We adopted the Latindex framework for classifying journal publishers, owing to its historical contributions and granularity. Latindex, established in 1997 as a regional initiative to catalog Ibero-American scholarly journals, developed a detailed taxonomy that distinguishes between types of publishers: scientific/professional associations, research institutes, independent academic editors, commercial publishers, educational institutions, governmental entities, and international organizations. This fine-grained classification was crucial for highlighting the prominence of non-commercial publishers. It illustrates how applying a regionally-informed framework (with roots in Latindex's decades of expertise) yields deeper insight into global publishing diversity.

Our analysis also speaks to the relationship between academic autonomy, institutional credibility, and journal quality. The dominance of academic and society publishers in the studied countries suggests

that many journals operate under the purview of universities and scholarly communities, which can bolster quality through academic oversight and mission-driven objectives.

In Latin America in particular, the scholarly publishing sector has evolved with a strong ethos of academic autonomy. Many journals are managed by university faculty or scientific associations and often funded by public research agencies or universities, rather than by commercial revenue streams. This public or institutional backing means that editorial decisions and quality control are largely in the hands of academic editors and committees, insulated from the profit motives that drive commercial publishing. Institutional credibility, i.e. the trust and reputation afforded to journals by virtue of their host universities or professional societies, substantially contributes to maintaining standards. Our findings resonate with Beigel (2025), who describes a "parallel value system" in Latin America's publishing circuit that prioritizes academic quality and independent editorship, anchored in the autonomy of universities and research centers.

Indeed, the survival and strength of Latin American journals have long depended on the public nature of their support and the commitment of academics who often treat editorship as a service to their community (Beigel, 2025). This suggests that high quality in scholarly communication need not be guaranteed by big commercial publishers alone. It can equally emerge from academia-driven initiatives where academic freedom and scholarly mission are the guiding principles. In countries like Brazil, Argentina, and Mexico, for example, many journals meet rigorous editorial criteria set by national systems or regional platforms without any involvement from the oligopoly publishers. Rather than being a weakness, the independence of these journals is often a strength that allows them to uphold local research agendas, multilingual content, and rigorous peer review aligned with academic (not commercial) incentives. At the same time, this autonomy-driven model highlights a different challenge: ensuring sufficient infrastructure and visibility. As Beigel (2025) notes, the main weakness of the Latin American ecosystem is not lack of quality, but the limited international *circulation* of its research output due to infrastructure gaps. Strengthening these journals' technological and indexing capabilities, without compromising their academic autonomy, is therefore vital for enhancing their global impact.

Crucially, we find that national policies and indexation practices have shaped publishing outcomes in each country, sometimes in very explicit ways. Research evaluation and funding policies often incentivize certain indexations, thereby influencing where and how journals seek visibility. Colombia is a clear example: its national indexing system has for years tied journal recognition to inclusion in international databases. Colombian journals are encouraged – even implicitly required for higher rankings – to be indexed in Web of Science or Scopus, which has led many to pursue those avenues. Our data show that Colombia consequently has an outsized share of journals indexed in WoS (especially in the Emerging Sources Citation Index) relative to other Latin American countries. This reflects a policy-driven push: Colombian journals that aspired to higher Publindex categories needed to meet criteria that included WoS/Scopus indexation, creating a powerful incentive structure. Argentina and Mexico present somewhat different dynamics. In Argentina, the government and CONICET (the national research council) historically provided support for domestic journals and encouraged open access platforms, but without a formal WoS/Scopus mandate. Instead, initiatives have focused on strengthening journals through quality standards and regional index inclusion. For instance, Argentina participates in SciELO and has its journals indexed in regional directories. Recent studies of Argentine journals emphasize improving accessibility and circulation (Beigel et al., 2022) rather than chasing international index metrics. Mexico's policies have also been influential: CONACYT established a national index of journals and has supported the development of platforms like Latindex and Redalyc (both originated in Mexico in 1997 and 2003, respectively) and the SciELO network (pioneered by Brazil in 1998, now spanning many Latin American countries including Mexico and Argentina) have become crucial regional indexation systems. These platforms set quality criteria and offer regional visibility, and national authorities often recognize them in research evaluation. Mexican

journals thus face a dual pathway: some aim for Scopus/WoS inclusion, spurred by the prestige such indexes carry, while many others prioritize Latindex, SciELO or Redalyc as a way to achieve recognition and accessibility in Spanish and Portuguese. The result of these policies is a divergence in publishing outcomes: in countries where incentives strongly align with global indexes (as in Colombia), a higher proportion of journals attain those indexes (e.g., many Colombian journals in ESCI and Scopus), whereas in countries prioritizing open access and regional indexing (as in Brazil, Argentina, and Mexico), journals may focus on Latindex/SciELO/Redalyc compliance and local impact. Notably, Brazil's long-standing support for SciELO has meant that a large number of Brazilian journals are in SciELO (ensuring they meet international standards of transparency and quality) even if they are not in WoS or Scopus. Each country's policy environment – from evaluation systems and funding incentives to the establishment of national journal portals – has profoundly influenced the trajectory of its journals. These examples illustrate that scholarly publishing is not a passive system but one actively molded by policy choices: whether to favor international prestige via WoS/Scopus or to build autonomous, local frameworks like Latindex, SciELO, Redalyc, and national databases. Such policy-driven outcomes reinforce that differences in publishing landscapes are not merely cultural or economic, but also structural, rooted in how nations value and reward journals.

The contrasts between global indexing services and comprehensive databases further expose structural biases in scholarly visibility. Our study compared coverage of the journals in Web of Science, Scopus, and the open index OpenAlex, and the results are revealing. As expected, WoS and Scopus are highly selective: they index only a small fraction of the total journals from each country, often preferring journals published by larger publishers or those with longstanding international reputation (which tend to be English-language publications). For example, less than 10% of the journals from Brazil or Argentina are indexed in WoS, and even the country with the highest WoS coverage (Colombia) only sees about 29% of its journals included. Scopus is slightly more inclusive but still far from comprehensive, capturing at best around 17–27% of journals in countries like Poland, Colombia, and Mexico, and under 10% in others. In stark contrast, OpenAlex indexed the majority of journals for most of our sample countries – over half in Brazil, Mexico, Poland, Argentina, and Turkey, and as high as 91% in Colombia.

OpenAlex's broad coverage reflects its different approach. As an aggregator of multiple sources (including Crossref and national repositories), it does not curate by perceived prestige, so it can include a vast array of journals that meet basic scholarly criteria. The fact that OpenAlex covers so many more titles than WoS or Scopus highlights a serious visibility gap stemming from index selectivity. Journals from non-commercial and non-Anglophone circuits are disproportionately absent from WoS/Scopus not necessarily because they lack quality, but often because of language, regional focus, or simply because commercial indexing services have limited bandwidth and particular inclusion policies. This creates a structural bias: research published in local journals (often in local languages or by smaller publishers) remains less visible in global citation databases, which in turn reinforces the perception that the only journals that "count" are those in WoS/Scopus. Our findings make this bias tangible. For instance, the dominant publisher types in our study – universities – had relatively low representation in WoS/Scopus, yet they were well-represented in OpenAlex, implying that traditional metrics undercount the contributions of these crucial academic publishers. This disparity is a reminder that *where* one looks for data significantly influences the conclusions: relying solely on selective indexes paints an incomplete picture of global scholarship. By using OpenAlex alongside WoS/Scopus, we illuminated the hidden majority of journals that are actively publishing quality research but remain under-recognized in mainstream metrics. In effect, our study reveals how database inclusion policies can skew the global understanding of scholarly publishing, and it underscores the need to address these visibility biases in research evaluation and bibliometric research alike.

Taken together, these insights carry important implications for future research, policy design, and the pursuit of more inclusive evaluation systems. First, our work demonstrates the value of broadening

data sources in bibliometric studies. Future research on scholarly publishing should strive to go *beyond the oligopoly* not just conceptually but methodologically – by integrating comprehensive databases, national indexes, and regional platforms to capture the full spectrum of scholarly communication. This may involve building on frameworks like the one we used (inspired by Latindex) to classify and study publishers in other regions, thereby avoiding one-dimensional views of the publishing landscape. Further studies could expand the country coverage, explore disciplines or languages in depth, and examine how the dominance of certain publisher types correlates with other outcomes (e.g., citation impact or open access prevalence).

Secondly, there are clear policy lessons for research systems and funding bodies. If hiring, promotion, and funding decisions are based narrowly on publications indexed in WoS or Scopus, they risk marginalizing a large body of scholarship that is locally relevant and often open access. National authorities and universities should recognize the legitimacy and value of credible journals outside the commercial mainstream – many of which adhere to high editorial standards and serve their scholarly communities. The examples of Finland's Publication Forum (which rates journals including local ones) and Latin America's Latindex/SciELO/Redalyc networks (which demonstrate regional quality indexing) can inspire more inclusive evaluation criteria. Policies could be designed to reward researchers for publishing in quality journals regardless of the publisher's market status or the journal's presence in selective databases, thus aligning academic incentives with a more diverse set of scholarly outputs.

Finally, our findings show the need for developing evaluation systems that are pluralistic and context-aware. Rather than one global index dictating journal prestige, a combination of international and local indices – along with qualitative assessments – should inform judgments of research quality. Embracing such pluralism would mitigate structural biases and recognize the contributions of scholars who publish in their native languages or within national circuits. In conclusion, the scholarly publishing landscape in Latin America, Europe, and beyond is richer and more varied than the oligopoly narrative suggests. Acknowledging and understanding this diversity is not only a matter of accuracy in research about publishing, but it is also integral to promoting a fair academic environment. By redesigning our data sources, policies, and evaluation metrics to include the full breadth of scholarly communication, we can better support the autonomy and vitality of academic publishing communities worldwide.

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