

# Taylor & Francis Developing Country Waiver Policy

## Background

We are updating our Developing Country Waiver policy for fully open access journals at Routledge and Taylor & Francis.

The two main reasons for making this change are:

- to increase the transparency around our waiver policy.
  - The current policy, which uses the Research4Life country bandings, has served us well. However, we increasingly experience a demand for transparency, such as an explanation for why a country has been categorised a certain way, which Research4Life cannot provide.
- to support more authors to access fully Gold Open Access publishing while maintaining similar levels of investment.
  - Our analysis of historic publication data across our fully open access portfolio suggests that the new policy means we can support more authors

## The Policy

Researchers based in less-economically developed countries are able to apply for waivers and discounts to support publishing in fully open access journals which have Article Publishing Charges (APCs):

- Corresponding authors based in low-income countries, as categorized by the World Bank, are eligible to apply for a full waiver of the APC.
- Corresponding authors based in lower-middle-income countries, as categorized by the World Bank, are eligible to apply for a 50% discount of the APC which applies to their article.

Eligibility is determined by the country of the corresponding author's primary affiliation.

Our discretionary waiver policy, for researchers who are not automatically eligible under the above policy, will still be handled on a case-by-case basis. Authors should supply full details of institutional affiliations and grant funding when making their request.

Applications must be made upon submission.

All discussion and decision on APC waivers and discounts is entirely separate from the peer review process. This is key for our membership of the Open Access Scholarly Publishers Association (OASPA) and inclusion in the Directory of Open Access Journals (DOAJ). We therefore ask editors to defer all questions from authors regarding the policy and requests under the policy to Rebecca Evans, Open Access Coordinator ([Rebecca.evans@tandf.co.uk](mailto:Rebecca.evans@tandf.co.uk)).

## World Bank Categories

As of 1 July 2016, low-income economies are defined as those with a GNI per capita, calculated using the [World Bank Atlas method](#), of \$1,025 or less in 2015; lower middle-income economies are those with a GNI per capita between \$1,026 and \$4,035. Further detail from the World Bank is available here: <https://blogs.worldbank.org/opendata/new-country-classifications-2016>. We will update our list of countries annually when the new classifications are published by the World Bank.

Lower-Middle-Income Economies	Low-Income Economies
Armenia	Afghanistan
Bangladesh	Benin
Bhutan	Burkina Faso
Bolivia	Burundi
Cabo Verde	Central African Republic
Cambodia	Chad
Cameroon	Comoros
Congo, Rep.	Congo, Dem. Rep.
Cote d'Ivoire	Eritrea
Djibouti	Ethiopia
Egypt	Gambia, The
El Salvador	Guinea
Ghana	Guinea-Bissau
Guatemala	Haiti
Honduras	Liberia
India	Madagascar
Indonesia	Malawi
Kenya	Mali
Kiribati	Mozambique
Kosovo	Nepal
Kyrgyz Republic	Niger
Lao People's Democratic Republic	Rwanda
Lesotho	Senegal
Mauritania	Sierra Leone
Micronesia (Federated States of)	Somalia
Moldova	Tanzania
Mongolia	Togo
Morocco	Uganda
Myanmar	Zimbabwe
Nicaragua	
Nigeria	
Pakistan	
Papua New Guinea	

Philippines
Samoa
Sao Tome and Principe
Solomon Islands
Sri Lanka
Sudan
Swaziland
Tajikistan
Timor-Leste
Tonga
Tunisia
Ukraine
Uzbekistan
Vanuatu
Vietnam
West Bank and Gaza
Yemen
Zambia

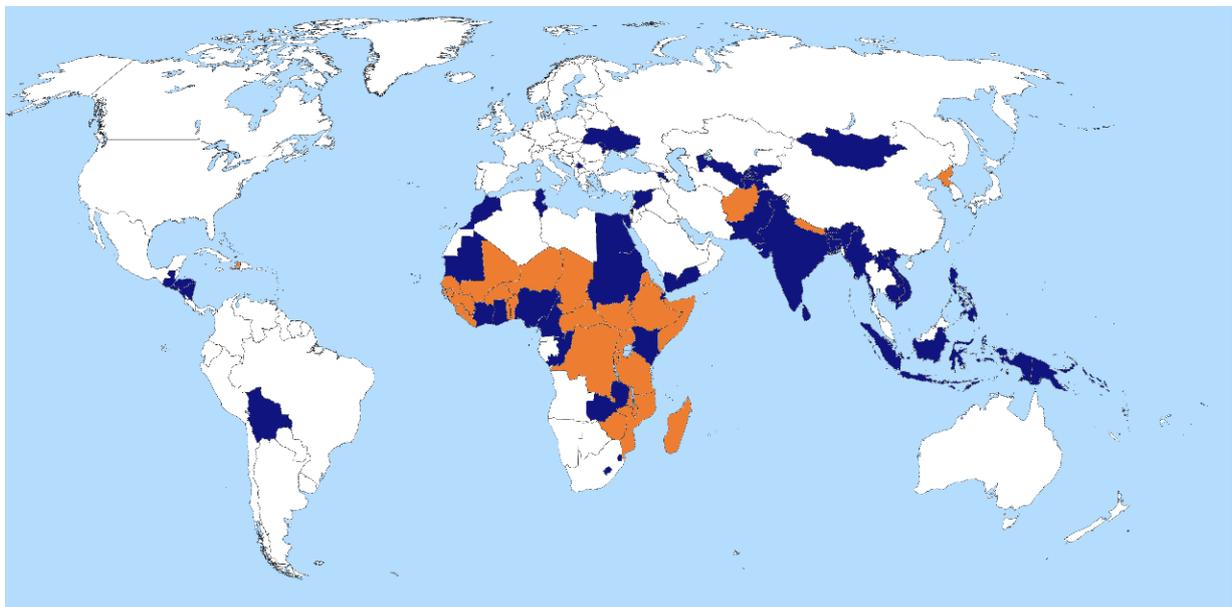


Figure 1: World Bank Low- & Lower-Middle Income Economies

World Bank Lower-Middle Income (50% discount)
  World Bank Low Income (Full waiver)

## Frequently Asked Questions

**When will the new policy apply from?**

We intend to implement the new policy in July 2017.

**What about authors who have already submitted to the journal and are in peer review?**

The new policy will apply on *new submissions* from July 2017. All authors in peer review with a waiver or discount already granted will receive the agreed waiver/discount.