



DIAMAS

Developing Institutional Open Access
Publishing Models to Advance
Scholarly Communication

The European landscape of institutional publishing

A synopsis
of results from
the DIAMAS survey

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DIAMAS is a HORIZON Europe project that aims to understand and support institutional publishing, paying particular attention to initiatives that do not charge fees to read or publish scholarly outputs, i.e., diamond open access (OA) publications.

The following synopsis presents a summary of the [DIAMAS project's Landscape Report "Institutional Publishing in the ERA; results from the DIAMAS survey"](#) highlighting its main findings.



Foreword

The [OA Diamond Journals Study](#) (OADJS, Bosman et al. 2021) provided an analysis of the global landscape of OA diamond journals and platforms and found that Diamond OA worldwide can be characterised as a largely fragmented archipelago of 17.000 to 29.000 journals. The study showed that this collaborative, community-driven publishing model needs to be more efficiently organised, coordinated, and funded to better support researchers in disseminating their work. Starting in September 2022, one of the goals of the EC funded DIAMAS project was to map the landscape of institutional OA publishers and service providers in the ERA in order to better understand the nature of their services for diamond OA scholarly journals and other outputs.

The DIAMAS project's institutional publishing Landscape Report is the result of this effort. It is intended to help academic institutions engaged in scholarly publishing to better understand the nature of their publishing services in a national and international context, and take measures to further align and increase the 'diamondisation' of the European institutional publishing landscape. The Landscape Report also provides a basis for the subsequent phases of the DIAMAS project, where a self-assessment tool is being developed to allow institutional publishers and service providers to evaluate themselves in terms of the Extensible Quality Standard for Institutional Publishing (EQSIP) developed in DIAMAS. This will improve the coordination, quality and sustainability of institutional publishers. In addition, the Landscape Report will enable DIAMAS to formulate policy and strategy recommendations for research performing organisations, funders, sponsors and donors, and regional, national and international policy makers to support the OA publishing activities of institutional publishers and service providers across the ERA.

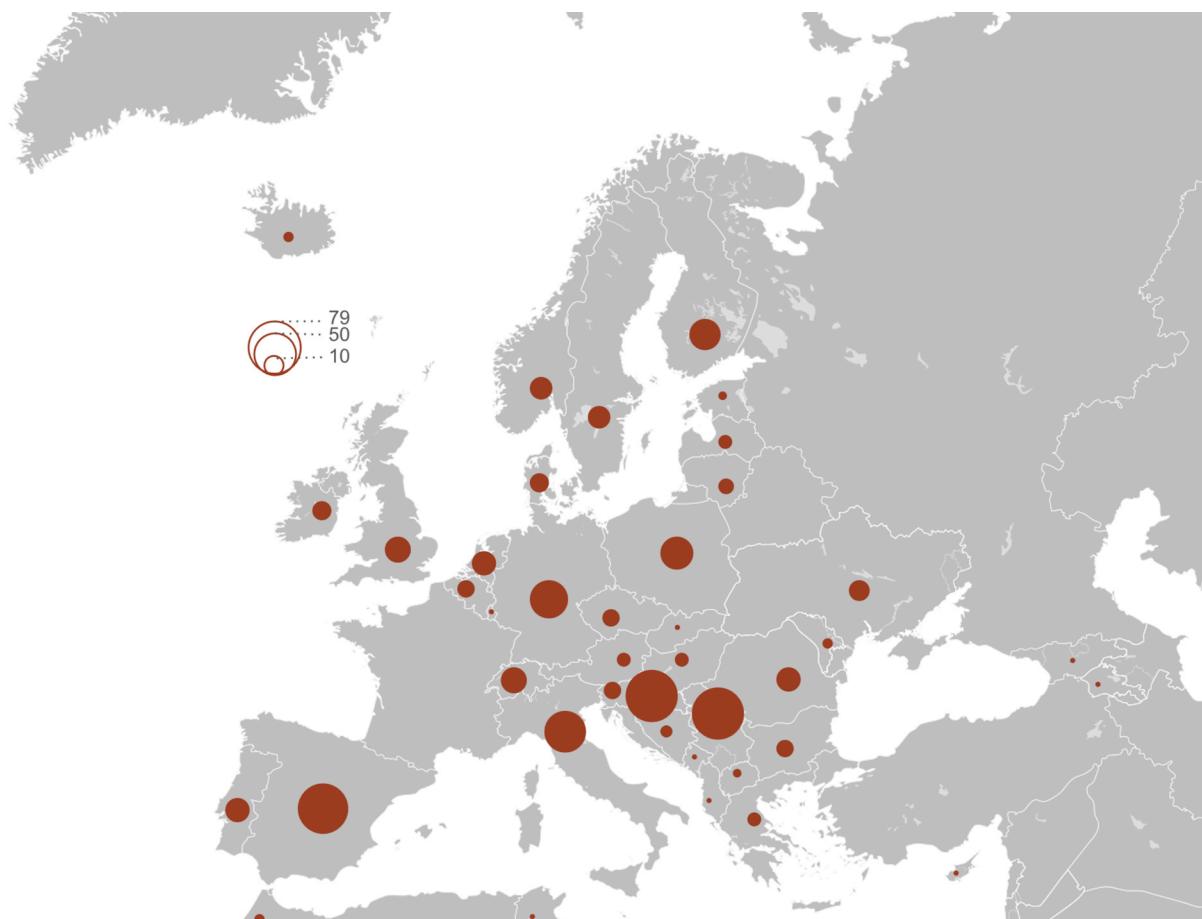
Introduction

The DIAMAS project aims to address institutional publishers and service providers in the broadest sense, focusing on publishing initiatives that do not charge fees to authors or readers. These ‘no fee’ publishing models are collectively known as diamond OA. To effectively investigate and support this publishing model and engage with the institutional publishing community, the project launched a survey, carried out from March to May 2023, to understand the current landscape of institutional publishing as a whole.

DIAMAS defines institutional publishing as publishing by academic organisations whose main aim and scope is to perform, fund, or promote the practice of research and scholarship. Examples of such are research performing organisations, research funding organisations, learned/scholarly societies, (national) academic and not-for-profit foundations, including academic communities and (groups of) editors owning journals.

The Institutional Publishing Landscape Report is built on 685 survey responses from institutional publishers and publishing service providers across the European Research Area. The findings illustrate the state of institutional publishing in Europe and show that a large portion of these organisations are operating with a diamond OA model. The report also discusses how institutional publishers are run and sustained, what activities they are involved in, and which services are outsourced. While the surveyed group is not necessarily representative of all institutional publishers and service providers in Europe, the findings broadly demonstrate the current operations of institutional publishers, their challenges, and the opportunities for supporting them in the future.

All publishers, institutional or otherwise, carry responsibility for governance and ownership of research output, but often rely on external organisations to provide support for services. Here these external organisations will be referred to as service providers. By investigating both institutional publishers and service providers, the survey intends to draw a picture of institutional publishing activities. Over three quarters of respondents to the survey self-identify as an institutional publisher, the remainder self-identify as service providers.



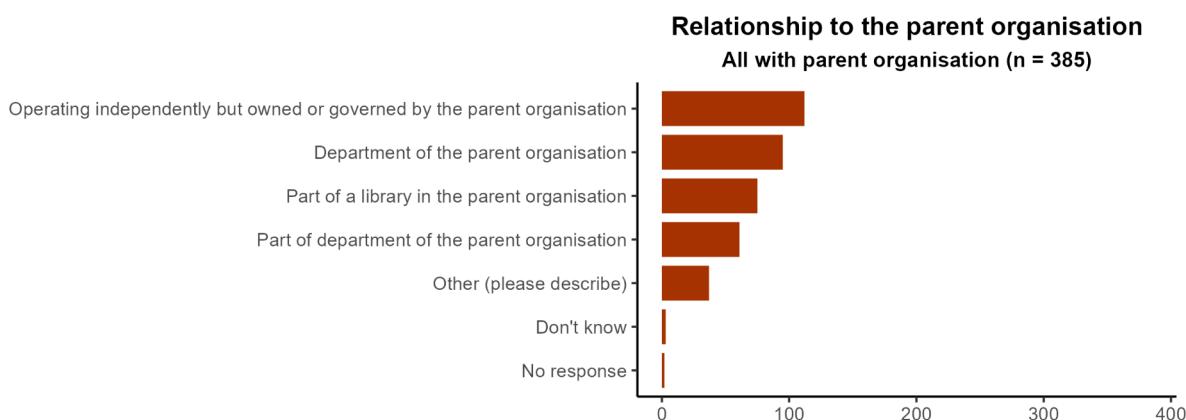
The main sections of this synopsis summarise the survey's extensive findings and have been selected to illustrate the key characteristics of institutional publishers in Europe. First, the **governance and editorial management** of organisations are outlined to show the organisational structure behind publishing activities. Second, the **open science practices** of respondents are discussed. Following this, a close look at **organisational finances** shows the scale and budget constraints that institutional publishers operate within. Finally, publisher practices related to **visibility, communication, and equity, diversity, and inclusion** are discussed.

Overall, the survey demonstrates that institutional publishers adhere to high standards of editorial management and have strong open science practices, often operating with a diamond model. The scale of operations is usually small – in terms of budgets, output, and staffing. This leads to a reliance on voluntary and in-kind contributions that cause significant barriers to publishing activities. Such findings point to clear pathways in which publishers and service providers can be supported in strengthening publishing activities, collaborating, and improving equitable access to scientific knowledge.

Governance and editorial management

Organisation structure, services, and activities

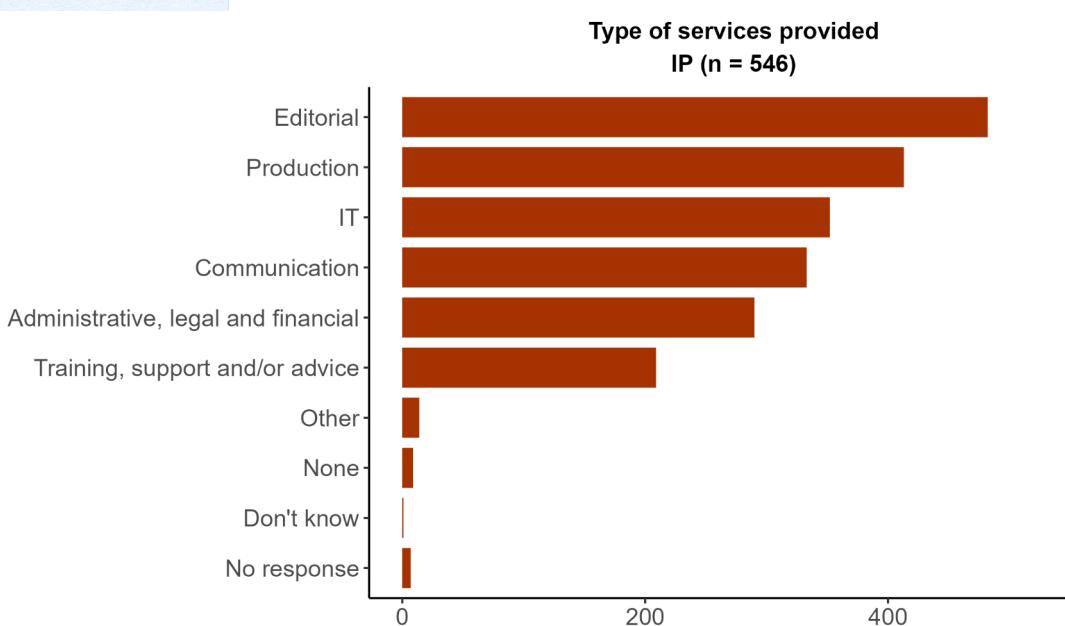
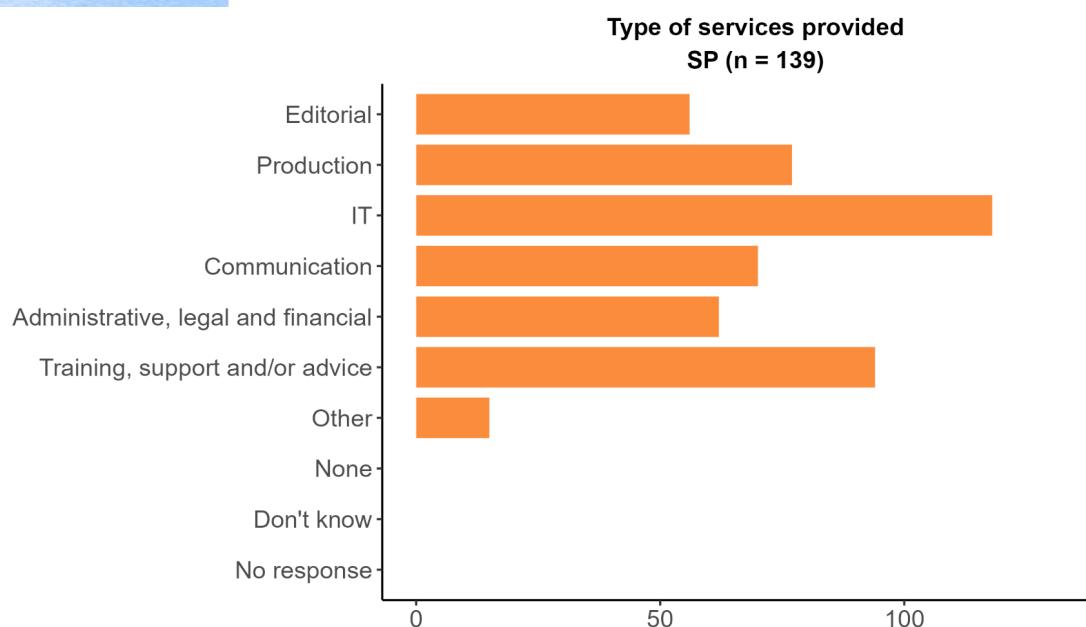
The legal status of institutional publishers and service providers is important as it relates to governance, business models, and sustainability. Of the institutional publishers that responded, over two-thirds are non-commercial public organisations. This rises to 85% when private not-for-profit organisations are included. Only 4% of institutional publishers are private companies. However, the survey found that service providers are more likely to be private companies. Among all respondents, around 60% of publishers and service providers are part of a parent organisation. This relationship with another organisation may be crucial in how publishing activities are conducted and affect the independence and sustainability of the publisher or their service providers. For example, a parent organisation may have policies that directly affect the operations of the publisher or service provider.



Breakdown of what type of relationship respondents have to their parent organisations

An important distinction must be made between publishers that have a certain degree of control in terms of ownership and governance, and service providers that mainly provide services to publishers, such as IT support, training, or production services. Comparing the responsibilities of these two different types of organisations demonstrates the different roles they fulfil in the publication process.

The survey shows that service providers mainly offer three services: IT services; training, support, and advice; and production services. By contrast, publishers mainly provide editorial services, production services, and IT services. Overall, publishers are involved in a range of publishing services themselves as well as their primary editorial function, whereas service providers offer more specialised support.



Compare the main functions of service providers (top)
with publishers (bottom)

A range of publication types were covered by the organisations contacted, demonstrating the diversity and range of publishing output. Different types of publications – journal articles, books, data sets – require specific expertise, knowledge, and software to properly produce and disseminate. Academic journals are by far the most common type of publication reported, with over 90% of organisations working with this format. There is likely a survey response bias towards organisations with journals in their portfolio, as these were specifically targeted in the survey dissemination. Nonetheless, academic books, conference outputs, grey literature, other research outputs, and non-academic outputs are all reported as types of publications that are dealt with by these organisations. For journals specifically, two-thirds of publishers and service providers have between 1 – 5 journals in their portfolio, with the remaining third having six or more. Organisations involved in institutional publishing are on average small in size, but diverse in terms of publication types, and rich in publishing expertise.

Editorial management

Editorial quality in scholarly publications refers to the standard of excellence in publishing journals, books, or other publications. High-quality content requires well-defined processes of editorial management and defined standards for research integrity. Over 75% of respondents are involved in four main areas of editorial management: recruiting and managing the editorial board, coordinating peer review, monitoring peer review, and sourcing reviewers. Only 2% of the publishers and service providers had no tasks in editorial management. Furthermore, 74% administer quality criteria to enable compliance, and 91% provide guidelines and instructions on publishing.

Double-anonymous peer review is the most commonly used review method, cited by 76% of respondents. This is followed by single-anonymous peer review (37%) and editorial review screening (33%). Currently, 17% are involved in some form of open peer review (open identities of reviewers, authors and editors, open review reports and open community participation in the peer review process).

This data shows a high level of involvement in the editorial management of publication output and active participation in the upkeep of quality and standards. The prevalence of double- and single-anonymous peer review shows that publishers and service providers predominantly adhere to traditional scholarly publishing norms. However, a small number are beginning to embrace new practices, such as open peer review.

Open science practices

OA publishing

How much of published content is OA? The answer to this simple yet fundamental question turns out to be quite complex, and caution is needed when generalising the survey findings to the wider population of institutional publishers. While the average numbers indicate very high OA output of 90% in scholarly journals, 76% in conference outputs and 58% in academic books, these average numbers do not represent consistency across all groups of survey respondents. However, the answers do indicate trends, which indicate that OA publishing is intertwined with disciplinary and regional publishing cultures, the legal entity of the publisher, and the number of journals published.

With 97% of journals publishing OA, Eastern Europe is well ahead of the average, Northern Europe proves to be above average in all output types and Western Europe has above average OA output in all categories – except scholarly journals. Southern Europe has more OA journal output but has the lowest OA percentages for all other output types in comparison to the other regions.

Similarly, tendencies connected to disciplinary publishing cultures can be observed. Social sciences have an above-average OA output for all publication types. For the humanities, this is the case for journals but not for books. In engineering and technology, OA shares consistently fall below the survey average for all output types.

Average values per groups	Journals	Books	Conference output	Grey literature	Non-standard research outputs	Non-academic outputs	Other outputs
Overall	90.1	58.2	75.5	62.6	63.2	51.1	54.0
Discipline (for IP who only publish in one discipline)							
Agricultural sciences	90.1	56.0	100.0	75.5		50.0	50.5
Engineering and technology	86.7	39.5	71.7	30.5	37.8	27.5	33.0
Humanities	92.2	57.1	67.9	36.8	65.3	53.1	58.9
Medical and health sciences	87.3	56.0	71.5	50.0	50.0	62.5	33.7
Natural sciences	89.5	64.9	73.2	45.0	60.6	50.8	62.5
Social sciences	92.5	59.0	84.0	92.9	94.0	78.0	94.5

Share of published content available in OA across disciplines.

Cells in yellow indicate values above average.

Companies and corporations tend to have lower OA content in their journals, yet they often lead the way in publishing different types of OA content such as books, conference outputs, grey literature, and non-academic outputs. The patterns for private not-for-profit and public organisations generally resemble each other, although the latter tend to be more open with their book content and the former more open in all other output types. Additionally, a higher number of published journals corresponds with a lower OA output.

Average values per groups	Journals	Books	Conference output	Grey literature	Non-standard research outputs	Non-academic outputs	Other outputs
Overall	90.1	58.2	75.5	62.6	63.2	51.1	54.0
Type of legal entity							
Company	64.2	30.6	42.3	1.0	10.0	18.0	2.0
Corporation	74.5	68.0	100.0	100.0		100.0	
Don't know	74.7		80.0				
Other	93.3	60.9	75.8	60.0	36.3	16.7	35.3
Private not-for-profit organisation	93.3	57.8	81.5	66.3	72.7	67.5	61.1
Public organisation	89.8	59.3	74.9	62.2	61.6	47.1	53.4
Number of journals published in the last year							
1	93.7	62.6	81.0	55.2	57.7	54.8	55.6
2-5	88.3	57.7	78.8	61.2	63.1	48.0	49.1
6-10	89.2	59.0	73.5	87.7	83.2	75.4	73.6
11-20	92.0	58.1	71.1	88.9	83.6	49.4	66.6
21-50	81.9	37.1	53.4	52.2	48.2	28.7	31.4
51-100	86.5	58.3	82.5	6.0	88.0	16.7	57.0
More than 100	69.0	52.0	100.0	100.0			

Share of published content available in OA across publishers of varying types and sizes. Cells in yellow indicate values above average.

The trends described above bear witness to a scholarly publishing landscape that is highly diverse and equally complex. This diverse and complex landscape needs support to reach its full potential.

OA policies and their effect

Within the sample of survey respondents, OA and open science policies turn out to have a significant effect. 87% adhere to various OA or open science policies, i.e., national, institutional, their own or other policies. Still, the connection between national or international open science policies and the policies issued or being followed within the publishing landscape of the academic community proves to be more complex.

Comparing books and journals, the tendency to adhere to OA/open science policies is especially prominent in the latter. This prevalence is worth looking at to understand the factors at play in enabling, enhancing and supporting (diamond) OA publishing. Comparing book and journal publishing in this regard, three major aspects are to be highlighted: 1) the political support for OA for journals is higher, 2) journal publishers represent a larger participant group than book publishers, 3) the maturity levels of policies about book publishing at the national and international levels among funders, institutions, and policymakers vary considerably, as also found in the DIAMAS sibling project [PALOMERA](#).

A closer look at national policies reveals that while survey responses do not mirror the legal and political landscape, they do provide valuable insights into general preferences within national contexts. For instance, several respondents from France explicitly referenced the National Open Science Policy and, equally, several respondents from Serbia mentioned the National Platform for Open Science. While Croatia does not have a national open science/OA policy in place, a majority of Croatian respondents have stated that they follow such a policy. This apparent paradox can be explained when taking into account the support for OA through different national laws and strategies, which foster the conviction among institutional publishers that Open Science aligns with national political preferences. Crucial aspects of said national context are the strong presence of the diamond model of OA publishing among Croatian journals, the influence of the central publishing platform Hrčak (where openness is a requirement for inclusion), and the Ministry of Science and Education's criteria for state subsidies, which emphasise openness.

Despite the national tendencies described above, the majority of respondents of some countries with well-established and widely communicated OA/open science policies such as the United Kingdom, Switzerland, Finland, or Spain have indicated to not follow these policies.

Such examples show that future actions aiming at enhancing the capacities for OA in institutional settings are most efficient when embedded in current institutional and/or national contexts, and aligned with already existing policies.

OA policies and their content

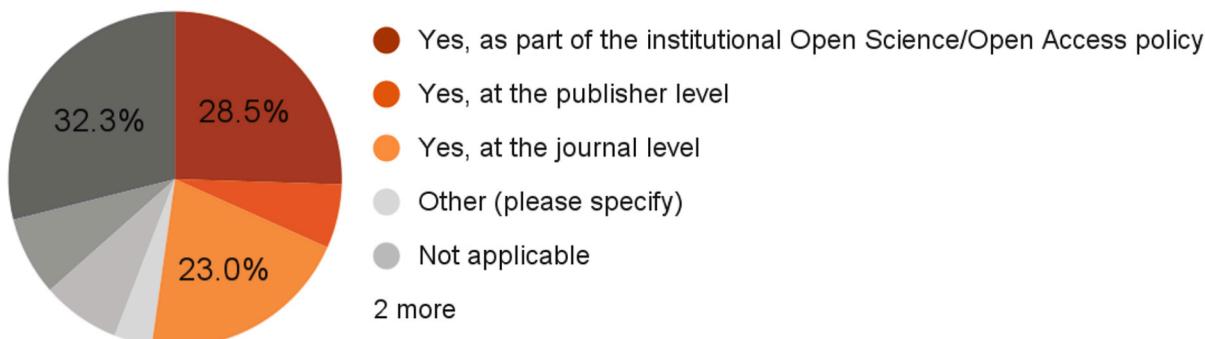
Publishers that reported following an OA/open science policy were questioned about the contents of these policies. A majority of 83% of respondents declared the policy covered copyright issues, and 70% said they covered self-archiving and open science licences. The publication of negative research results was barely mentioned in OA/open science policies.

Despite the widespread use of open science licences only a slight majority of respondents opt for a licence that is completely aligned with OA principles and that ensures comprehensive reuse and redistribution rights. Clearly a substantial number of responding publishers does not offer an article publication route that would be compliant with the CC BY requirement of cOAlition S funders.

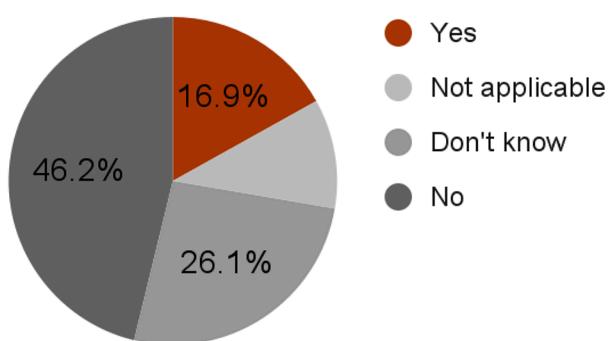
While some open science principles such as the use of Creative Commons licences and allowing authors to self-archive their content in open repositories seem to have become rather common among journal and book publishers, other open science practices were adopted far less frequently by a substantial number of survey respondents. For example, the acceptance of pre-print submissions, making references openly available according to the principles of the [Initiative for Open Citations](#), open peer review, research data sharing policies and the distinction of contributor roles (according to the [CRediT Contributor Roles Taxonomy](#)). To a certain extent, a lack of awareness and a lack of compliance with these practices can be linked to disciplinary publication cultures, e.g., the acceptance of preprints, which is uncommon in the Humanities. Such examples show that future actions aiming at enhancing the capacities for OA in institutional settings are most efficient when embedded in current institutional and/or national contexts, and aligned with already existing policies.



Degree of open peer-review implementation



Research data sharing policy in place



Contributor roles distinguished (as in CRediT)

Financing and operations

Income sources

The survey set out to understand how publishing organisations are funded, what sources of income support activities, what the costs are and how savings might be made, how finances are managed and what the financial constraints and challenges are. Of the publishers who responded, 71% are both fully OA and fully diamond for journals and 27% are open and diamond for book publications. Just over 25% publish all their journals and books in OA without charging author processing charges (APCs) or book publishing charges (BPC). This raises the question of how this publication model is financed.

19% of publishers who work with OA journals, but are not entirely diamond, rely on APCs as a revenue stream at certain points in the last three years. Some 23.5% of publishers use voluntary author contributions (VACs) as a revenue stream, and 8% of respondents rely highly or very highly on this income source.

For those who have an entirely diamond OA publishing portfolio, 54% rely on a fixed and permanent subsidy from a parent organisation, with 43.5% stating a high reliance on this income source. Almost 20% of publishers rely on periodically negotiated subsidies from their parent organisation. Moreover, just over 50% rely on time-limited grants or public or private subsidies from outside their organisation and 21% depend on them highly or very highly. Finally, 31% rely on content and print sales although few rely highly or very highly upon these (6%). Periodically negotiated subsidies are more common amongst fully diamond OA institutional publishers than with publishers who rely on APCs and other income streams.

The different approaches to funding are evident in this group of publishers and reliance on subsidies, APCs, and closed content differs greatly. Even though not all institutional OA publishing is diamond, institutional publishers who publish in OA are far more likely to use a diamond model than relying on APCs, which shows the clear linkage between institutional publishing and diamond OA.

As regards to what extent some have relied upon certain funding sources over the last 3 years, fixed and permanent subsidies from a parent organisation are the most important, and many respondents state that they rely on them highly or very highly. Periodically negotiated subsidies from the parent organisation, Time-limited grants or subsidies, either private or public from outside the organisation and permanent public government funding (international, national, local) are also often highly relied upon. These are also often considered the most stable types of income.

Annual budgets and constraints

Publishers and service providers often operate on medium to small yearly budgets. Just 18% report an annual budget of more than 100K EUR. Whereas 49% have an annual budget of 50K EUR or less, of which 21% report a budget of 10K EUR or less. 7% have a budget of less than 1K EUR per year. Over half of the publishers and service providers that responded (57%) report having an approved annual budget compared with the 34% who do not. Furthermore, 42% have both an approved budget and a document containing statutes, by-laws, or articles of association (internal regulations). 10% of the total sample begin each year with neither an approved budget nor a document with statutes, by-laws, or articles of association (internal regulations). This shows that a substantial share of organisations have formal budgeting practices in place. However, there is a notable group that functions without such a framework, meaning that the ownership and financial management practices may not be optimal and may threaten the mid to long-term stability of the organisation.

Such situations may imply that publishers and service providers often work with significant financial constraints, affecting several areas of their operations. When asked about their main financial sustainability challenges, respondents reported three main areas:

1. the lack of financial resources;
2. the lack of stability and permanence in employment, and
3. the dependence on parent organisations,

with the lack of financial resources mentioned most often (50%).

In addition, over half of the respondents who reported technical challenges cited financial issues with providing adequate resources for the infrastructure and services. Indexation allows access and visibility to outputs of publishers but the survey found that many respondents had financial difficulties to meet this need. Accessibility standards of content is also an issue that financial constraints lead to difficulties, as 68% of respondents faced issues financing the accessibility standards of content.

Staffing and support

In terms of staff numbers, the majority of publishing organisations are small in size. Around 50% have between one and five (full-time equivalent employees (FTE), with a further 25% that have no paid staff members whatsoever. The size distribution in terms of paid full-time staff varies throughout Europe. The number of responding organisations in the survey without any paid staff is much smaller in Western and Northern Europe than in Eastern and Southern Europe. The labour of paid staff is often supported and supplemented by volunteer effort. Almost half of publishers and service providers (48%) report a high or very high reliance on non-monetary and in-kind support.

Reducing costs

Publishers and service providers were asked to consider opportunities for reducing costs by collaborating with other organisations. Responses show that all areas of the publishing workflow were seen to have potential for collaboration, but notably three categories stood out as the most promising: IT services, training support and/or advice, and production services. Of those who expressed a willingness to collaborate, 60% came from organisations with a budget of less than 50K EUR per year. However, 16% of publishers and service providers stated that they would not consider collaboration with other organisations. Comments were collected on how attempts at collaboration had previously failed. The most prominent being organisational limitations for outsourcing activities, including accounting, competition, public procurement rules and contract regulations.

The knowledge that many publishers and service providers see cost-reducing opportunities in collaboration with others presents clear opportunities for future development. Any collaborative endeavour must have quality control and financial management mechanisms built in to avoid some of the pitfalls of collaboration such as high or unsustainable costs and low-quality service provision, and try to ensure that the organisation can manage the challenges with outsourcing and knowledge transfer effectively. Doing so would act to prevent issues which may deter such cost-reducing efforts in the future.

Visibility and communication

To ensure the visibility and discoverability of scientific content, proper indexation and effective external communication are crucial. Nonetheless, less than half of the survey participants (45%) consider their content well-indexed and more than half (55%) express a desire to improve the indexation of their content.

For survey respondents, two aspects stand out as particularly challenging when applying for indexation: 1) satisfying technical and non-technical participation criteria along with meeting metadata requirements (60%), and 2) finance-related challenges such as paying for memberships (44%) and recurring charges (43%).

The dissatisfaction with the indexation of content is connected with staff and budget size. Dissatisfaction seems to be more pronounced among smaller publishers and when indexation is not taken care of by their institution, whereas publishers with a range of 21-30 FTE or budgets ranging between 500K to 1M EUR, generally exhibit a high level of satisfaction regarding their coverage in indexing databases. This trend has one exception: the largest publishers and service providers with FTE larger than 30 and a budget exceeding 1M EUR displayed dissatisfaction as well.

Digital communication tools that keep the respective academic communities up to date are overall well-integrated: 66% of responding publishers and service providers indicate that they have a newsletter, one or more social media accounts, and a networking profile.

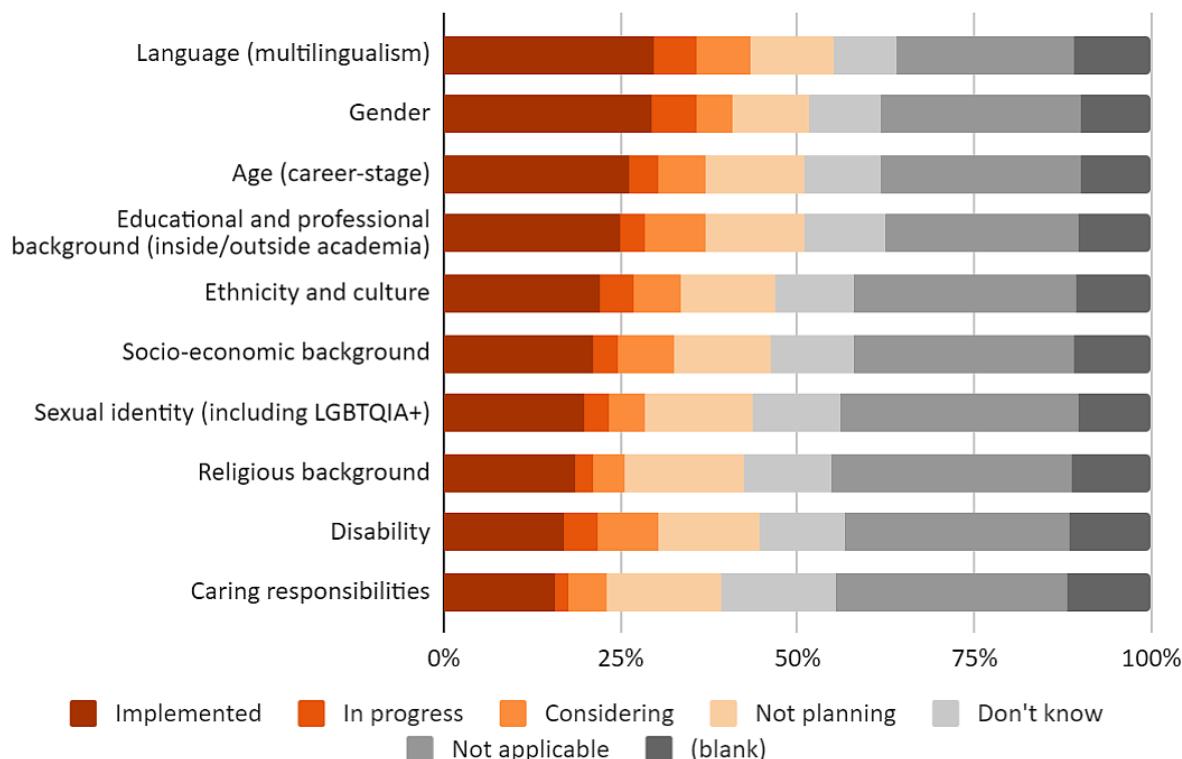
Measuring reach and impact

Unsurprisingly, the three most commonly used metrics are article-usage metrics (67%); submission, acceptance and publication dates (64%); and publication-level usage metrics (43%). Impact metrics are deemed important by a large share of respondents as well, with 38% displaying publication-level impact indicators and 36% article-level impact indicators.

Southern European service providers and publishers display publication-level impact metrics more often than their counterparts in other regions. This tendency can be traced back to their strong focus on including citation indexes. Similarly, the use of commercial service providers such as Altmetric and Plum X Metrics is, as expected, widespread among publishers and service providers with larger budgets.

Equity, Diversity, Inclusion and Belonging (EDIB)

The survey shows that the EDIB dimensions are not yet an accepted standard in academic publishing. However, a closer look at the respondents answers reveals a large variety in EDIB dimensions addressed and measures implemented: more than half of the respondents (54%) indicate not being able to implement a single one of the EDIB dimensions in the survey (age (career-stage), gender, sexual identity (including LGBTQIA+), ethnicity and culture, religious background, socio-economic background (e.g. within a country, or global north/south), educational and professional background (inside/outside academia), language (multilingualism), caring responsibilities, disability). Contrary to that, more than a quarter (27%) report addressing three or more dimensions and 9% report addressing all dimensions.

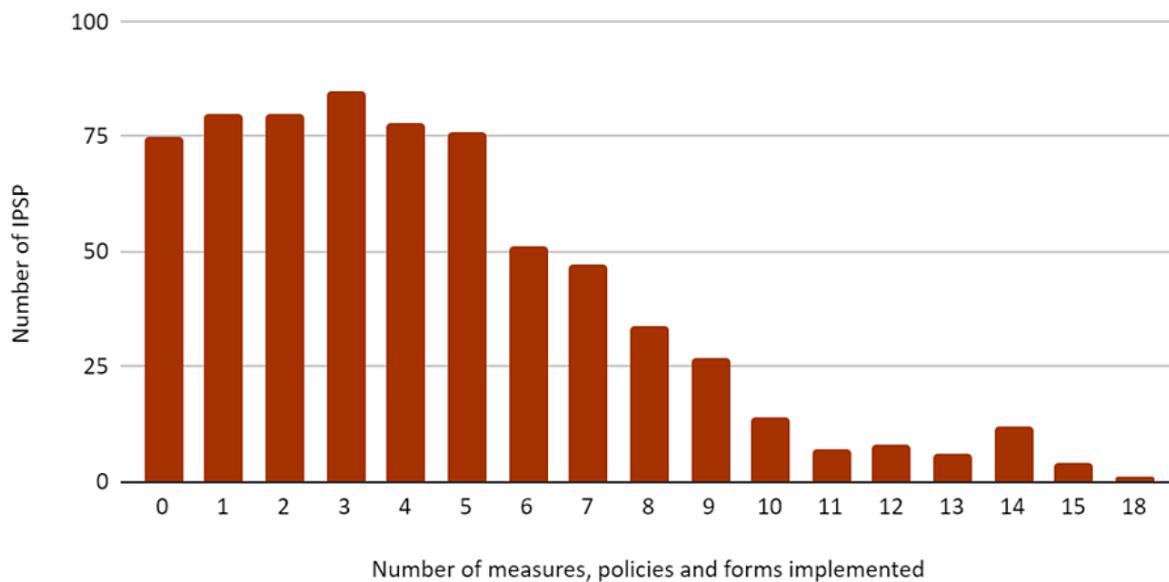


Dimensions of equity, diversity, inclusion and belonging addressed

Most commonly implemented are EDIB measures such as a code of conduct and non-discrimination/positive discrimination policies. Again, the variety among publishers and service providers is immense with measures connecting to the dimensions of gender, age (career-stage) and language implemented most often.

Particularly interesting in this context is whether and why the measures taken lead to meeting specific standards and requirements or not. For example, a majority of publishers and service providers answering the survey (87%) did not indicate meeting any of the five accessibility standards proposed in the questionnaire. Most commonly, a lack of resources (60%), technical limitations (50%) and a lack of expertise (51%) were given as reasons. Additionally, the share of 'don't know' answers indicated a general lack of awareness concerning accessibility. This conglomerate of challenges is further evidence of the need to support institutional publishers' need to sufficiently cover all of the EDIB dimensions.

Overall, the percentage of survey respondents implementing all of the proposed EDIB measures is very low, with 58% of publishers and service providers implementing one to five measures.



Implementation of measures, policies and forms to promote EDIB dimensions, accessibility and multilingualism)



Summary and implications

Institutional publishing and equitable, community-driven scholarly publishing are intrinsically connected. While institutional publishers and service providers already have a high percentage of diamond OA outputs and publication practices, the Landscape Survey of Institutional Publishing helped identify areas where institutional publishers require further support to sustainably guarantee diamond OA as an equitable and community-driven solution to scholarly publishing. On average, institutional publishers and service providers are small in size of output, budget, and staff. They often employ open science practices and display high editorial standards and professionalism.

Despite their engagement with diamond OA, a lack of sustainable funding and technical proficiency, the dependence on unpaid and voluntary work, as well as insufficient support, challenge the further development of equitable scholarly publishing. The need for better indexation and the lack of implementation of EDIB dimensions are examples of where these challenges hinder the potential of institutional publishing.

Support for the ‘diamondisation’ of scholarly publishing may prove to be most efficient when publishing is embedded in an institutional context. The DIAMAS project will assist and facilitate the progressing diamondisation of the institutional publishing landscape by helping to create a **European Research Area Diamond Capacity Hub (ERA-DCH)** that will facilitate equitable OA scholarly publishing without fees for readers and authors. The ERA-DCH aims to regionally facilitate a globally distributed, aligned, high-quality, and sustainable scholarly communication infrastructure that is both managed and owned by the scholarly community.

Most crucially, what has become evident throughout the findings of the landscape report on institutional publishing is that institutional publishing is an important gateway to the diamondisation of scholarly publishing.



Download the full report

The Landscape Report “**Institutional Publishing in the ERA; results from the DIAMAS survey**” presents the results more fully, and includes short reports on institutional publishing for countries in the ERA.

Available at: <https://doi.org/10.5281/zenodo.10022184>



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