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## **Open access, open infrastructures, and their funding: Learning from histories to more effectively enhance diamond OA ecologies for books**

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## THEORY ARTICLE

# Open access, open infrastructures, and their funding: Learning from histories to more effectively enhance diamond OA ecologies for books

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## INTRODUCTION

The decade since the “Bottlenecks in the Open Access System” special issue of JLSC in 2014 has been an expansive one for open access (OA) and OA books in particular. The creation of a scholarly publishing ecosystem that enables works to be freely accessible for readers has been successful in many ways. However, the underlying politics and economics of OA scholarly publishing often remain opaque or under-interrogated (Lawson et al., 2015). The problems with journal OA funding, specifically regarding inequality of access to publishing, discussed by Bonaccorso et al. (2014) in their contribution to that issue, have also increased and become entrenched as we discuss below. This entrenchment has been largely via the growth and consolidation of gold OA, “transformative” agreements, and read-and-publish journal deals, which have effectively, and unnecessarily, commodified OA publications. We would argue that this is in direct tension with some of the foundations of contemporary OA. OA was explicitly described from early principles as *not* a business model and as aiming to reduce financial barriers from authors, libraries, and other groups (Suber, 2024).

We would like to note that, while the main focus of this paper is books, we begin with a discussion of journals. This is because we are focusing on the history, development, and

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critiques of OA *fundings* in the intervening ten years following the “Bottlenecks” special issue. OA journal publishing has been at the forefront of discussions of OA funding, and it has dominated the last decade, and more, of this discussion; it would therefore be remiss of us not to discuss this history, the resulting current landscape of inequity, and the potential ramifications if this were to be transferred to OA books, a more nascent field in general.

## OA: A DECADE FURTHER WITHIN THE SCHOLARLY PUBLISHING MARKET

Before we move on to our main argument, it is necessary to set out part of the historical context of the evolution of OA discourse and the financial models that underpin it. The landmark Declaration of the Budapest Open Access Initiative noted back in 2002 that “[a]chieving open access will require new cost recovery models and financing mechanisms, but the significantly lower overall cost of dissemination is a reason to be confident that the goal is attainable and not merely preferable or utopian” (BOAI, 2002). Therefore, processing charges<sup>1</sup> were not a component of definitions of work where the final version of record was published OA. However, in journal publishing, gold OA has become synonymous with article processing charges (APCs)<sup>2</sup> (Mac Síthigh and Sheekey, 2012; Clark et al., 2024), where authors or their institutions pay a one-off fee to publish an article. With commercial publishers such as the Big Five (Elsevier, Springer Nature, Wiley, Sage, and Taylor & Francis) dominating scholarly publishing, processing charge-led gold OA has subsequently exploded in volume and costs,<sup>3</sup> while the social inequities of access to publishing between authors highlighted by Bonaccorso et al. (2014) have been substantiated by subsequent research (Fuchs and Sandoval, 2013; Klebel and Ross-Hellauer, 2023).

The association between gold OA and processing charges has been consolidated in recent years. With the APC model becoming dominant in legacy journals, born-OA

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<sup>1</sup> Throughout this article, “processing charges” are referred to as they are a part of the nomenclature of gold OA. However, we have a number of issues with the term, in part because there is no consistent transparency surrounding the material construction of such “charges”.

<sup>2</sup> Read-and-publish, transformative, and transitional agreements are also associated with gold OA, and this is commented upon throughout this article. We consider any payments *required* for works to be published OA to be within the purview of gold OA.

<sup>3</sup> A report on the 2012 state of the market estimated that \$182 million had been spent annually, with an expected growth of 34% a year, to tail off to 20% within 5 years (Bjork and Solomon 2014 <https://wellcome.org/sites/default/files/developing-effective-market-for-open-access-article-processing-charges-mar14.pdf>). If anything, this proved to be an underestimate as Jisc estimated that the top 12 publishers, who account for 70% of the market, generated \$2 billion in APCs in 2020.

publishers such as Frontiers Media SA and MDPI, with business models predicated on processing charges, have also been established. Both Frontiers and MDPI have rapidly grown in the last decade, but this growth has not been without its controversies, including, among others, accusations of predatory practices and negative impacts on research cultures in certain geopolitical contexts (Csomós & Farkas, 2022). Yet the unintended consequences of the APC model include wider issues pertaining to global inequities that are not exclusively economic. For instance, Aibar (2024) recently presented further evidence of disproportionate geographical author and editorial affiliations at MDPI. This may imply that there are variable global pressures in the pursuit of rapid publication through gold OA. While it is beyond the remit of this paper to further interrogate this, there is an increasing literature around the problems that this nascent pattern may imply (Wang et al., 2021; Frandsen, 2022).

Such scholarly issues around gold OA have been compounded by the reliance of commercial publishers on processing charges (alongside read-and-publish deals)<sup>4</sup> and the growth of “hybrid” OA, blending closed and open content within publications. This further commercializes OA through a close proximity—and an increasing assumption—of payments being necessary to publish discrete works as OA, ultimately diminishing the potential that OA has always offered: to introduce greater equity into scholarly publishing.

Transformative agreements, originally conceived of as temporary mechanisms to aid publishers as they “flipped” their closed journals to open, have proliferated.<sup>5</sup> They had temporary implied support from organizations including cOAlition S, who set parameters and timeframes for transition (cOAlition S, n.d.[a]), although wider communities including non-profit OA publishers were not universally convinced that such mechanisms were fit for their intended purpose (Farley et al., 2021). Regardless, they have failed in this aim. A recent report by Jisc, the national agency that oversees such agreements in the UK, has called their efficacy into question, calculating that at the current rate of change, it would take 70 years for the Big Five publishers to flip the titles within these agreements to OA (Bakker et al., 2024; Brayman et al., 2024). And at the same time, some major research organizations that had previously given financial resources to support both these agreements and APCs have withdrawn their support, such as the Bill & Melinda Gates Foundation

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<sup>4</sup> The “Big Five” commercial academic publishers use APCs heavily and profit greatly from them. See [https://doi.org/10.1162/qss\\_a\\_00272](https://doi.org/10.1162/qss_a_00272) for details.

<sup>5</sup> Growing from the first agreement with Springer in 2016 to, as of January 2024, 75 separate agreements between university libraries and 47 different publishers. Brayman et al. (2024) <https://zenodo.org/records/10787392>.

ceasing funding APCs from 2025 ([Dufour et al., 2023](#); [Bill & Melinda Gates Foundation, 2024](#)) and cOAlition S members ending financial support for transformative agreements after 2024 ([cOAlition S, n.d.\[b\]](#)).

As processing charges have soared ([Scholarly Communications Lab, 2024](#)), and sources of funding beyond resource budgets for APCs and transitional agreements have begun to decline, library budgets have continued to face cuts ([McKendrick, 2011](#); [Tillack, 2014](#); [Rossmann and Arlitsch, 2015](#); [Hinchcliffe, 2022](#)), which have compounded these financial difficulties and the resulting inequities of access to publication. These developments have emphasized that “freedom to read” as the primary goal fails to consider the variables of where, and with what restrictions, research can be openly published. However, there have been other, more positive, developments during this time. One of them, and the main focus of this article, has been the growth of OA, particularly diamond OA, for books throughout this period.

We would also like to acknowledge that we are limiting ourselves to discussing the funding landscape in which we operate, which is skewed heavily towards the Global Minority ([Alam, 2008](#)), in particular the UK, the US, and Europe. But by this we are not implying that OA, and diamond OA, are Global Minority movements. On the contrary, “public knowledge infrastructures developed in Latin America, Indonesia, and Africa, and the scholarly communication practices of the former Eastern Bloc” have been hugely influential to global diamond OA futures ([Joy and van Gerven Oei, 2024](#)). For example, SciELO in Latin America ([SciELO, n.d.](#)), African Platform for Open Scholarship in Africa ([African Platform for Open Scholarship, n.d.](#)), and Journals Online Project, which covers many regions ([INASP, n.d.](#)), are all longstanding projects providing vital OA infrastructures and services in their local contexts.

We have outlined above that OA funding is by no means a monolith; the same holds for many other critiques of OA as a mechanism for the dissemination of scholarly knowledge. For example, some argue that OA makes it “more challenging to litigate the misuse of published papers or books [by commercial AI models scraping the internet]” ([Heidt, 2024](#)). However, this is not a problem exclusive to OA, and it is one that is being actively addressed ([In The Library With The Lead Pipe, n.d.](#)); at least one major commercial publisher has already confirmed it will not give authors the option to avoid having their data scraped by AI models ([Battersby, 2024](#)). However, this and other critiques and concerns of the wider ramifications of OA are outside the scope of this article.

## CRYSTALLIZATION OF OA BOOKS

In 2014, many publishers were only tentatively beginning to engage with OA books,<sup>6</sup> but in recent years this has become a much larger cohort, publishing more titles.<sup>7</sup> Making books openly available to read also pertains to a different aspect of equitable access to knowledge. As Copim has argued (Adema et al., 2024), this is because it increases parity between disciplines, as STEM (Science, Technology, Engineering & Math) research is more likely to be published in journals, while AHSS (Arts, Humanities & Social Sciences) research is still more commonly disseminated in monographs and other longform works.

Funder mandates have only very recently begun to reflect the possibilities for OA books. For example, UKRI, the UK national funding agency directing research and innovation funding, brought in a requirement for OA for monographs, edited collections, and chapters from 2024 (UKRI, 2023), while Research Councils UK, which pre-existed the formation of UKRI in 2018, published an OA policy for research articles in 2013 (Research Councils UK, 2013). The Research Excellence Framework (REF), the UK's national research assessment exercise, has also delayed the implementation of any mandate for OA for longform outputs until 2029, following their article mandate, which applies to publications from 2016 onwards (REF, 2024). The slower development and implementation of policies for OA books has likely impeded their quantitative growth.

However, the ethical drive towards OA from scholarly communities and libraries has helped equitable funding models to qualitatively develop and flourish independent of policy. We are also conscious that OA policies that are agnostic of the funding barriers for OA books may offer opportunities and incentives for commercial publishers, including the Big Five and others. It might enable them to extract unsustainable profits from OA book production and sustain the inequities that we have endured in OA journal publishing that have grown dramatically as a result of the policies implemented in the UK and European Research Area (ERA) particularly. Repeating the modes of OA publication that have been fostered through

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<sup>6</sup> While this information is not always easy to retrieve, some publishers have highlighted it; Springer Nature began a pilot in 2011 <https://www.springernature.com/gp/open-research/journals-books/books>, Palgrave began in 2013 <https://www.palgrave.com/gp/blogs/perspectives-in-politics-international-studies/oa-books-5-years-blog>, De Gruyter in 2010 <https://www.degruyter.com/publishing/publications/openaccess/open-access-at-de-gruyter?lang=en>.

<sup>7</sup> It is difficult to measure this directly, but there are clear indirect indications; for example, a search of history books on DOAB shows an increase from 95 books published in 2015 to 193 books published in 2020, and again to 251 books published in 2023. A search of medicine and nursing books shows an increase from 95 books published in 2015 to 146 books published in 2020, and again to 305 books published in 2023. Across all subjects, the number of DOAB entries in 2013 was 2,469. For 2023 it was 8,325, indicating a greater than 300% increase in annual output over that decade.

policies could consolidate the exploitation of OA for commercial gain. In this spirit, we will highlight below case studies that provide solutions to these problems.

A vital piece of context for these solutions is that OA book publishers have had to grapple with the funding question later than journals, in part as a result of slower policy implementation. To date, community-led, collective OA book funding models have developed relatively independent from OA policies, and often without direct financial support from research funders. As a result, as OA policies and mandates begin to include books, these models provide an alternative route to that seen with journals, with more proactive moves made to avoid some of the inequities of access to publishing and strong commercialization that have a strong hold on journal publishing.

### DIAMOND OA PUBLISHING, BOOKS, AND THE COPIM PROJECT

As discussed, many of the issues and barriers surrounding OA publication in journals are financial at their root. This is no less true for OA books. However, new approaches to these problems have recently emerged, perhaps most notably from punctum books, Open Book Publishers, and service providers such as The Directory of Open Access Books (DOAB)/OAPEN library: collective funding models for diamond OA and open infrastructures.<sup>8</sup> Several factors have precipitated this.

A common financial model for OA books has been book processing charges (BPCs), which are the book analogue of the APC. These often cost well over \$12,000 per title,<sup>9</sup> and thus entail all the inequities of an APC but on a larger scale. Furthermore, as books are more closely associated with AHSS subjects, the funding available to academics looking to publish is even more limited (Newfield, 2022).

Scholarly book publishing involves a closer and lengthier collaborative relationship between authors and editors than is common for journals. The book market has also not yet experienced the imposition of transformative or read-and-publish agreements.<sup>10</sup>

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<sup>8</sup> It is important to acknowledge that these sort of funding models have been successfully implemented in the journal space since 2013 by the Open Library of Humanities, a library-funded diamond OA journal publisher that has expanded to 30 journals since its inception and has made waves by “flipping” journals at highly commercial presses by convincing their editors to leave and reform at OLH.

<sup>9</sup> The Open Book Environment is a curated and up to date collection of publisher fees. [https://docs.google.com/spreadsheets/d/15TtYZtYNamjo-SZ6\\_7hI3pY64LeAwC2ElBSDLxbmN4/edit?gid=59142032#gid=59142032](https://docs.google.com/spreadsheets/d/15TtYZtYNamjo-SZ6_7hI3pY64LeAwC2ElBSDLxbmN4/edit?gid=59142032#gid=59142032)

<sup>10</sup> Although one commercial publisher has very recently proposed a funding model that essentially does exactly this, as it has not yet been implemented, it is unclear how successful this will be (<https://openaccessbooksnetwork.hcommons.org/2024/05/30/open-eba-open-for-feedback/>).



Diamond OA differs (Mac Síthigh and Sheekey, 2012; Fuchs and Sandoval, 2013) from the common practice of gold OA (i.e., APC or read-and-publish) in several ways; the reader does not pay to read, but nor does the author pay to publish (OA Books Toolkit, 2020), meaning that authors are not required to provide funding to make their work available to wider audiences, enabling it to have greater potential reach and impact. Instead, the publishing costs are met by third parties. There are various mechanisms by which funds are transferred from third parties to publishers. For example, some institutions support their own diamond OA press, covering the costs of publication.<sup>11</sup> However, such examples of diamond OA university presses are limited and subject to the financial ability of the parent organization to fund necessary staff and infrastructures. As such, publishers such as punctum books and Open Book Publishers have created partnership schemes with libraries to diversify their revenue stream with a level of predictability (punctum books, n.d.; Open Book Publishers, n.d.[b]), and also provide avenues for libraries wishing to support diamond OA. Born diamond OA publishers are also often non-profit and usually scholar-led.

Copim Open Book Futures (Copim), an internationally funded project which has been working on OA monograph infrastructure since 2019 (Copim Open Book Futures, n.d.), is building on and expanding these types of library partnership funding schemes. In the following section, we will outline how these schemes work and how they have been successful in facilitating diamond OA since their inception, as well as showcase the experiences of participating authors.

## OPENING THE FUTURE

The Opening the Future (OtF) mechanism is a subscription offer that leverages a publisher's backlist to fund a diamond OA frontlist (Opening the Future, n.d.). For this reason, it is sometimes informally known as "Backlist to the Future." Publishers curate packages of their backlist that libraries pay a subscription fee to access. After three years of continuous subscription, the library retains perpetual access to the titles that they have subscribed to, making it an acquisition by the library (Opening the Future, n.d.). These subscription fees are then used to fund new frontlist titles to be published OA when the author does not have the funds to pay a BPC. They otherwise would have been published closed access.

Opening the Future is currently implemented with two publishers, Liverpool University Press and Central European University Press, both since 2021. In this time, library subscriptions have facilitated the publication of 29 books across both presses that otherwise would have remained closed, with further funding accrued for many more (Hopkins & Grady, 2024).

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<sup>11</sup> E.g., Radboud University Press (<https://radbouduniversitypress.nl/>).



This provides obvious financial benefits to the publisher, enabling them to publish titles OA without the need for a BPC; it also provides tangible benefits to the supporting libraries, which acquire the backlist titles in the packages at low cost, while also funding open frontlist titles as part of a shared global collection. Opening the Future are listed on trusted catalogues such as Jisc and Lyris, which enables libraries to participate easily and with confidence.

CEU Press has found this opportunity to open up more of their books to be extremely valuable, as they are a leading publisher on Eastern Europe and its historical, social, and political relationship with Russia. Due to the current Russia-Ukraine conflict, it is even more important that their publications are freely available to those hoping to understand the conflict's context, and to academics in Ukraine who are unable to access titles currently.<sup>12</sup> CEU Press's case highlights that it is not simply about the numbers of books that are opened up, or even the increased numbers of downloads and citations that OA titles garner, but the context in which unfettered access to publication and to reading is enabled is equally important.

It is currently in the process of expanding its program to work with three more publishers to develop their own implementation of the mechanism, enabling them to begin publishing frontlist titles diamond OA. It will be working with smaller, scholarly/institutional presses to provide human resources and expertise on library membership schemes that might otherwise have been a barrier to participation for smaller presses (Hopkins, 2024).

## THE OPEN BOOK COLLECTIVE

The Open Book Collective (OBC) is a registered charity in the UK (1206287) that builds upon and expands the library membership program funding model (Open Book Collective, n.d.[a]). Libraries are thus able to offer financial support to Diamond OA publishers and open infrastructure providers to publish without a cost burden for research organizations, authors, and readers.

This offers libraries and their wider institutions multiple direct benefits. By the supporting library diversifying their investments in pursuit of satisfying the needs of their readers and authors, the OBC's transparent annual costs are helpful for budget cycles; the supporting library can participate in the governance of the OBC as a Custodian of the OBC; and, of course, there are no fees encumbered in publishing chapters, edited collections, or monographs with any OBC publisher members. The supporting library is also contributing towards the construction of a more sustainable, equitable, and bibliodiverse open publishing ecology (Open Book Collective, n.d.[b]).

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<sup>12</sup> Personal communication with CEU Press.

Some of the smaller publishers within the OBC would not be able to administrate a membership scheme to provide such a revenue stream. Mattering Press is an example of a small, born diamond OA publisher that can now use library membership revenue to reduce their reliance on BPCs.<sup>13</sup> This has enabled Mattering Press to strategically plan and manage publication workflows due to a reliable stream of revenue. As a result of this, Mattering Press, a diamond OA book publisher, which recently published the Freeman Award 2024–winning title (EASST, 2024) *Democratic Situations* (Birkbak and Papazu, 2022), has been able to remunerate labor within the publication workflow. Other OBC members, such as White Horse Press, have also been able to change their business model towards becoming fully diamond OA through the revenue stream from the OBC’s membership scheme: “[T]o become fully-OA, we need to find library supporters. With the OBC, these vital connections are made more efficiently, which reduces the trickiest barrier to our OA future.”<sup>14</sup>

The Open Book Collective’s expansion of the library membership scheme as a collective for smaller OA presses can also help libraries to support diamond OA collaboratively. The OBC is a registered charity that will be financially self-sustaining by May 2026. Its charitable status encumbers it with significant responsibilities to the Charity Commission, which requires it to work closely with their publishers directly and with the oversight of both their Membership Committee and Board of Stewards. This enables libraries to have confidence in the OBC’s sustainability and in them as an intermediary to a range of high-quality OA publishers and open service providers. They are also listed in national library subscription catalogues such as Jisc (UK) and IReL (Ireland), each of which are established as trusted partners for their national library communities, enabling subscriptions to be simplified.

The OBC has also recently added three university presses to the collective, with further applications currently being reviewed. This shows an appetite from the wider, established publishing landscape in publishing diamond OA books through collective funding, providing early evidence that it is a sustainable model for more equitable OA publishing. This can further increase the bibliodiversity within and across diamond OA by including a broader range of publishers that can publish different kinds of books.

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<sup>13</sup> Mattering Press, along with many other diamond OA publishers, never *required* BPCs as a condition of publication. However, where an author had access to funding, many diamond OA publishers will accept a fee from those authors, or their funders, or their affiliated institution as this provides a vital revenue stream in lieu of collective funding.

<sup>14</sup> Working together quote attributed to James Rice: <https://openbookcollective.org/>.

## AUTHOR EXPERIENCES

So far, this article has focused on the logistics and arguments surrounding OA, and to a lesser extent on the perspectives of publishers and libraries. One perspective that is also extremely important is that of the author, and the benefits they feel from publishing their work OA, without having to finance a BPC. The experiences of authors are crucial for evidencing the value of smaller OA publishers in pursuit of a more community-led approach to OA book publishing and dissemination.

Some publishers engaged in diamond OA schemes, including OtF and OBC, have interviewed their authors about their experiences of being able to publish their work OA without financial burden. The rest of this section summarizes the views presented by some of these authors.

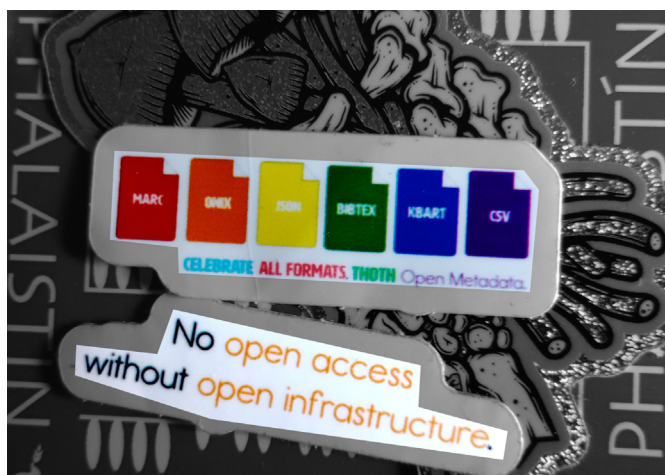
For example, CEU Press interviewed Dr Tomasz Kamusella about his experience publishing his atlas of language politics without a BPC, via the Opening the Future mechanism, noting that it enabled the work to be used widely for teaching, and had facilitated far more direct contact from students asking him questions about his research ([Central European University Press, 2024](#)).

punctum books recently interviewed one of their authors, Prof. Matthew Cheney, who explained that his institution would not have been able to fund a BPC, as his faculty's entire annual OA fund is less than a quarter of the average BPC cost ([Snyder, 2024](#)). He also emphasized how being able to publish one of his titles OA meant that it had developed a wider reach to students and non-academic readers than was the case for his other—paywalled—titles, and discussed how publishing with punctum books had been a supportive experience, and a pleasure. Another author testimonial by Lauren Berlant describes her view that punctum books, in making work free, avoids reproducing class inequality within the context of scholarly research dissemination ([punctum books, 2020](#)). Open Book Publishers has also shared many author testimonials ([Open Book Publishers, n.d.\[a\]](#)), including that of David Yeandle who noted that they enable high-quality monographs which may not otherwise easily be published, to be accessible to a wider audience.

The University of Westminster Press (UWP), another OBC member, has also been able to publish several titles without charging a BPC, via various initiatives such as Jisc's OACF (Open Access Community Framework) fund ([Jisc, 2023](#)). In a recent press brochure, they shared the experiences of some of these authors. Prof. Micky Lee stated that publishing in this manner enabled the wide and open sharing of research findings and described UWP as highly

supportive not only of OA publishing but also of academic rigor. Prof. Gerda Wielander felt that publishing diamond OA was a purposeful move away from hierarchical and profit-driven publishing towards something more ethical (UWP, 2023). Prof. Andrew Smith, in an interview about his experience with UWP for OAPEN (OA Books Toolkit, 2022), felt that being enabled to publish OA by UWP's financial support had helped his book reach a wider geographic audience and more non-academic readers.

There were strong common themes among these authors' experiences. Some would not have had the funds to publish their work OA via a BPC route, highlighting the exclusionary nature of these charges. All described how publishing OA had greatly expanded access to their works in several senses; geographically, by readership, but also by audience type, particularly focusing on students and non-academic audiences. Fairness and equality pervaded these testimonials, as did the purposeful move away from corporate publishers who dominate academic publishing. They also acknowledged the publishing process as high quality and rigorous, in contrast to the notion that quality, and therefore prestige, are the preserve of legacy and closed access publishers.<sup>15</sup>



(Image credit: Photograph by Kira Hopkins, editing by Kevin Sanders. Image issued under CC0).

<sup>15</sup> This criticism can be difficult to pin down directly, but its presence can be felt strongly in “mythbusting” exercises about OA books, e.g., from OAPEN: <https://oabooks-toolkit.org/article/13606437-common-myths-about-open-acces>, from the Open Access Books Network: <https://openaccessbooksnetwork.hcommons.org/oa-mythbusters/>, and from institutional guides such as at The University of North Carolina at Chapel Hill: <https://guides.lib.unc.edu/c.php?g=207455&p=1368891#s-lg-box-wrapper-4873229/>.

## COPIM AND WIDER DIAMOND OA INFRASTRUCTURES

In recent years, open infrastructures<sup>16</sup> have been recognized as a vital component of OA (Steinhart et al., 2024a).<sup>17</sup> As “Bottlenecks” (Bonaccorso et al., 2014) alludes to, free online access to read is only one component of a *libre* publishing ecosystem.<sup>18</sup> While enabling OA book publishing is the main orientation of this piece, there are many other stages in the research and publication process that need to be part of that same open *ecosystem*: freely available research data, open submission and review platforms, open metadata and metrics, to name just a few (Invest in Open Infrastructure, n.d.).

Diamond OA is in a phase of rapid infrastructural development and consolidation (Steinhart et al., 2024b), exemplified by, among others, the European Commission–funded DIAMAS project in Europe (DIAMAS, n.d.). While much of this, including DIAMAS, is focused on journal publishing, there is an awareness that this infrastructuring must also incorporate and support books, particularly in the wake of increasing funder mandates.<sup>19</sup> It is also to this end that the recently concluded PALOMERA (Policy Alignment of Open Access Monographs in the European Research Area) project has aimed to document OA policies and mandates in the ERA and provide “actionable recommendations and concrete resources to support and coordinate aligned funder and institutional policies for OA books” (PALOMERA, n.d.).

One of the constituent parts of the Copim Open Book Futures project, Thoth (Thoth, n.d.), works on the creation and dissemination of high-quality metadata in order to aid the discoverability of OA works, with a particular focus on supporting small and/or new OA publishers by improving metadata workflows. This aspect of their work remains free and available to all publishers in perpetuity. Thoth also provides paid options for long-term archiving and preservation of OA work to ensure that it remains accessible. It has recently built partnerships with

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<sup>16</sup> Defined by Invest in Open as “the sets of services, protocols, standards and software that the academic ecosystem needs in order to perform its functions throughout the research lifecycle” <https://investinopen.org/about/> and by SCOSS as “the scholarly communication resources and services, including software, that we depend upon to enable the scientific and scholarly community to collect, store, organise, access, share, and assess research” <https://scoss.org/what-is-scoss/defining-open-infrastructure/>.

<sup>17</sup> In particular the “Year of incorporation” section, which shows an increase in new infrastructure initiatives in 2015 following steady growth since 2005.

<sup>18</sup> For the distinction between *gratis* and *libre*, see here: <https://dash.harvard.edu/handle/1/4322580>

<sup>19</sup> <https://www.jisc.ac.uk/blog/infrastructure-is-key-to-supporting-the-sectors-shift-towards-open-access-for-monographs> for the UK perspective; for a wider European view, another project named PALOMERA <https://operas-eu.org/projects/palomera/> is currently underway to understand why so few funder policies encompass OA books, and to provide “actionable recommendations to change this,” which may lead to further mandates in the future.

DOAB and Crossref (Steiner et al., 2024), two other vital publishing infrastructures, and in the case of Crossref, an infrastructure that is not exclusively related to OA. This growing interdependence and collaboration can be linked to the maturation and complexity of open infrastructure projects, which will support wider OA initiatives as they develop (Steinhart et al., 2024c).

These infrastructures are becoming increasingly interconnected and interoperable to support wider aspects of research dissemination from data repositories, through peer review platforms, and on to metadata dissemination. This infrastructuring provides a robust and open pipeline for OA publishing.

## CONCLUSIONS

The last decade has seen great change in OA publishing, and for OA books in particular. Diamond OA has begun to flourish, with a number of groups developing and implementing BPC-free funding schemes. OA has observably “grown”; publication numbers have expanded across journals and books; the number of publishers of all sizes and categories engaging with OA has increased; funder mandates that either require or suggest OA have bloomed and continue to propagate. Infrastructures that support OA have continued to develop, particularly in the ERA, which is creating extensive networks to support diamond OA publishing such as DIAMAS.

However, the focus on the granularity of openly published articles, editions, and volumes obfuscates the critique that we offer around processing charge-led OA models. Quantitatively, the volume of OA publications is a success by its own narrow remit. However, qualitatively, the picture is more complex as inequalities and tensions have mushroomed in between and around the increased volume of works published OA. In addition to the problematic publishing patterns referenced above in the section on gold OA, OA journals have seen APCs rise, often above inflation (Khoo, 2019; Borrego, 2023; Scholarly Communications Lab, 2024). The adoption of “transformative” agreements has further entrenched financial inequalities where libraries cannot afford to participate in them, and they have enabled publishers offering such deals to expropriate greater private profits from public funding. At least in the UK, such agreements are facing mounting criticism as exemplified by the Jisc report discussed earlier (Brayman et al., 2024); they may satiate part of the demand for OA while sustaining the prestige economy, but they contribute to the total costs for libraries growing. What has *not* grown, but rather has withered, is the pool of funding from higher education institutions (HEIs) and external organizations that support this ecosystem (McKendrick, 2011; Tillack, 2014; Rossmann and Arlitsch, 2015; Hinchcliffe, 2022).



While transformative agreements theoretically intend to synthesize *part* of the library-publisher dynamic for the provision of access to paywalled content and gold OA publishing opportunities, as the Jisc report (Brayman et al., 2024) finds, they fail to meaningfully shift publications towards an OA future. It is partly this friction between the demand and requirements for OA and the issues of financial inequity that have driven so many of the positive developments outlined above with regard to diamond OA and open infrastructure providers. However, there are still many uncertainties and concerns over how the landscape will develop in the coming years.

We have referred at various points to the OA “landscape,” or to a broad set of “initiatives,” to numerous open infrastructures, and to different models such as gold, diamond, and hybrid. OA has a large and diverse purview. The aims of much of OA’s work may be in tension with a commercial publishing ethos, which is underscored by International Open Access Week’s theme for 2023 and 2024: “Community over Commercialization” (International Open Access Week, 2024; Hopkins et al., 2024). Future research in this area could helpfully consider the tension between the ethos of higher education with current research assessment practices.

Commercial and legacy publishers are beginning to explore collective diamond OA funding of the sort undertaken by OtF and the OBC.<sup>20</sup> It remains to be seen how this will impact earlier, more scholar-oriented iterations of these models, such as that of MIT Press, whose Direct to Open program and the University of Michigan’s Fund to Mission both began in 2021 (MIT Press Direct, n.d.; Michigan Publishing, n.d.), as they begin to vie for increasingly pressured library resources in pursuit of diamond OA. Of course, this pressure inherently stems from the nature of *competing* for funding rather than *collaborating* to share resources and overheads, which is, in part, what Copim and its partners are trying to achieve.

Copim has collectively developed robust operating practices and governance models in this space to protect organizations from commercial acquisition and to ensure that, for example, the OBC is community-led (Open Book Collective, n.d.[b]). Newer non-profit subsidiaries of legacy publishers that are emerging are welcome. However, such non-profit subsidiaries would benefit from providing full transparency around their governance to evidence their long-term,

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<sup>20</sup> Examples of such commercial moves into the sphere are Bloomsbury Academic in 2023 <https://www.bloomsbury.com/uk/discover/bloomsbury-academic/open-access/bloomsbury-open-collections/>, Taylor and Francis in 2023 <https://newsroom.taylorandfrancisgroup.com/pledge-to-open/>, De Gruyter’s via eBound, a non-profit subsidiary of De Gruyter working with their network of university press partners (UPLO), in 2024 <https://uplopen.com/>. This last scheme, UPLOpen, explicitly cites Opening the Future, as well as another project, TOME (Towards an Open Monograph Ecosystem), as forerunners, Peter Lang in 2024 <https://www.peterlang.com/our-services/open-eba/>.



structural, and economic autonomy can help to insulate such collective funding models from commercial orientation or appropriation. This is particularly important for any such model that self-describes as “community-led” ([Hopkins et al., 2024](#)).

Copim and others are working towards diamond OA books becoming a more enshrined component of research dissemination at the institutional level, as each continues to develop and articulate their own strategies. While the majority of Copim’s outreach and collaboration is with libraries and publishers, the efficacy of national and funder policies in providing incentives for diamond OA publishing is recognized. Copim and many other peers continue to offer feedback to policy developments to ensure that diamond OA is not overshadowed by gold OA through imprecise policy writing.

These policy developments will enable budgets, both at individual libraries and at higher levels, to be reconfigured to support diamond OA initiatives. There are some reasons for optimism here; the PALOMERA project cited above aims to facilitate the greater inclusion of OA books in national funder mandates within the ERA, and some individual countries, such as Ireland, are aiming to move towards OA for all national research outputs by 2030 ([NORF, 2022](#); [Loughnane et al., 2024](#)). At the institutional level, the University of Sheffield is a leader in this work ([Barr, 2023](#)), and many other Copim supporters such as the University of York ([Thompson, 2024](#)), University of Arizona ([Dubinsky, 2024](#)), and the University of Sussex are also pushing the sector in this direction. The University of Sussex recently presented their approach to carving out OA funding within their budget, in accordance with the institution’s wider core values, at a Jisc webinar ([Logan, 2024](#)). This reshaping of budgets would also help to financially support the growing network of open infrastructures, which in turn make it easier for research to be disseminated and available openly.

There are also reasons to be optimistic for growth of another sort: that of diamond OA publishing initiatives expanding into new regions where they are not yet widely present. This move is implied by the announcement of the pilot project Open Books Hong Kong, a collaboration between three university presses and their supporting libraries ([Open Books Hong Kong, 2024](#)). Again, this emphasizes that diamond OA has a diverse range of histories and contemporary iterations rather than a singular, linear narrative from a Global Minority movement. The groundbreaking work of SciELO and the African Platform for Open Scholarship have provided nodes and guidance for the development of local services that can be created as community-led and globally collaborative endeavors.

As we have acknowledged, OA developments over the last decade have made more research freely available at the point of access. However, this metric, as a primary measure of OA’s success, is not without its limitations. These limitations are qualitative in nature. APCs and

transformative agreements have already entrenched financial inequities, inadvertently problematized access to authorship and its incentives, and have continued to commodify OA publishing (Lawson et al., 2015; Khoo, 2019; Borrego, 2023; Scholarly Communications Lab, 2024). But we have also outlined some of the qualitative solutions that are being developed to tackle these problems, particularly in the form of diamond OA funding mechanisms as collaborative endeavors among publishers, libraries, and scholars. If the wider communities in the scholarly environment continue the open infrastructuring of our collective landscape, its nurturing through mutual support will enable diamond OA publishing to flourish and, in turn, support the health and sustainability of the open scholarly environment and its communities.

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