

Small European publishers and the transition to open access publishing: a 2025 snapshot

By Alicia Wise, Gali Halevi, Dave Jago, Lorraine Estelle,
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An independent report commissioned and overseen by the Knowledge Exchange Task and Finish group for small publishers and the transition to OA

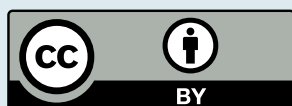
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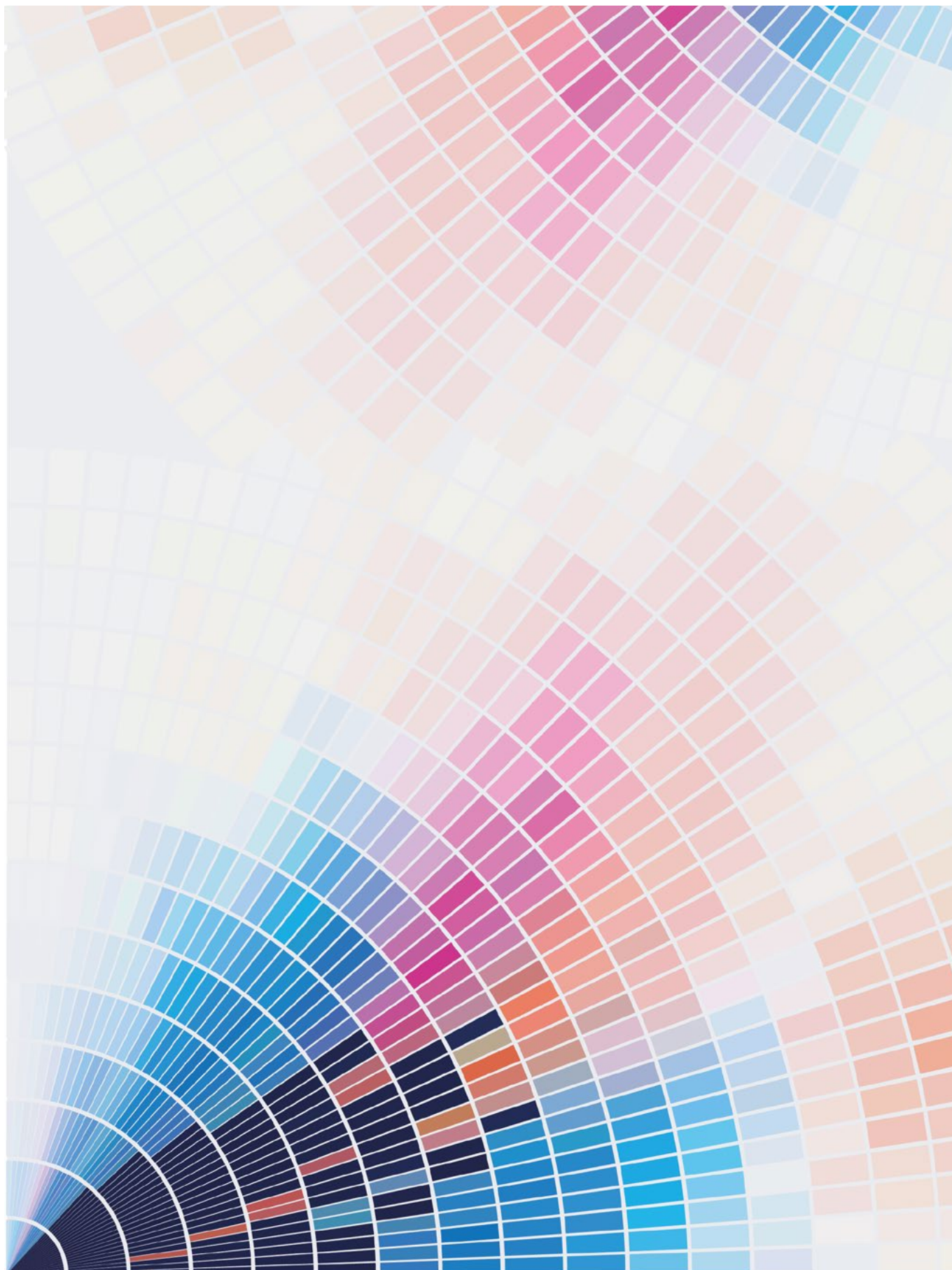


This study has been commissioned and overseen by Knowledge Exchange (KE), a group of national organisations from six European countries, addressing the challenges of keeping digital research infrastructure and policy aligned with rapid political, technological, and societal changes: CSC in Finland, CNRS in France, DeiC in Denmark, DFG in Germany, Jisc in the UK and SURF in the Netherlands.

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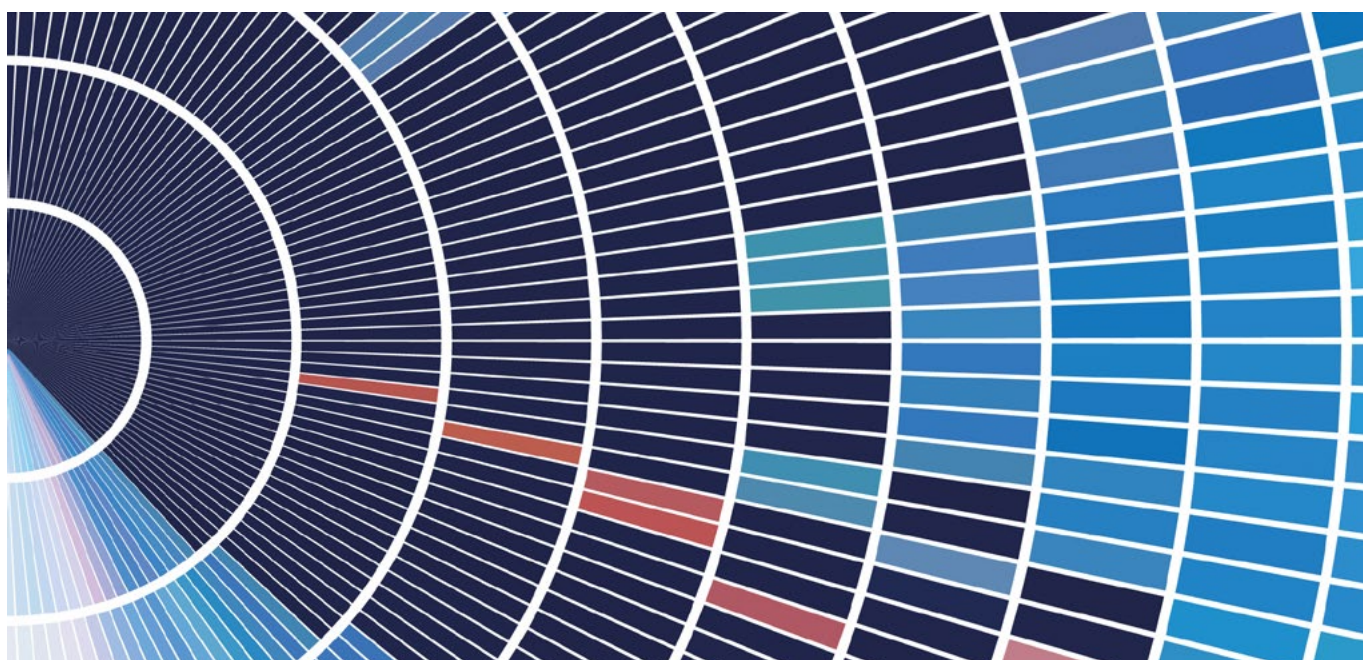
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Executive summary

The Knowledge Exchange commissioned Information Power to investigate the challenges and opportunities faced by small European publishers in transitioning to open access (OA). The study builds on a 2022 landscape analysis and incorporates interviews, focus groups, and case studies across six countries: Denmark, Finland, France, Germany, the Netherlands, and the UK.

Smaller publishers are vital to scholarly communication, particularly in the humanities and social sciences, and in regional or linguistic contexts often underserved by large commercial publishers. While they share a strong ideological and ethical alignment with OA principles, their ability to transition sustainably is constrained by structural inequities of scale, limited resources, and systemic barriers in the publishing ecosystem.



Key findings

Benefits of OA for small publishers

- ▶ Strong ethical alignment: publishers see OA as a moral imperative, ensuring taxpayer-funded research is publicly accessible and bridging global inequalities.
- ▶ Tangible advantages: increased visibility, readership, and author appeal, particularly among younger researchers.
- ▶ Strategic necessity: OA is viewed as the inevitable “direction of travel” in scholarly publishing.

Barriers and concerns

- ▶ Financial fragility: Sustainable models remain elusive. Diamond OA is admired but risky; Read and Publish deals favour large publishers; Subscribe to Open (S2O) offers promise but with doubts over long-term stability. Available funding is piecemeal, short term, and administratively burdensome.
- ▶ Operational capacity: Most small publishers run lean operations with few or no full-time staff. Limited capacity hampers funding applications, infrastructure upgrades, policy compliance, and handling of legal matters.
- ▶ Prestige perceptions: OA is often perceived by academic authors as less prestigious, shaping author submission patterns and reinforcing a cycle of reduced visibility and legitimacy.
- ▶ Quality assurance risks: Growth of poorly governed OA venues and predatory practices threaten credibility. Safeguards, stronger institutional responsibility, and robust editorial oversight are urgently needed.
- ▶ Collaboration tensions: Partnerships with peer publishers and non-profits are generally positive, offering shared infrastructure and support. By contrast, collaborations with large commercial publishers are viewed with scepticism due to concerns about editorial independence, misaligned values, and market concentration.

Inequities of scale

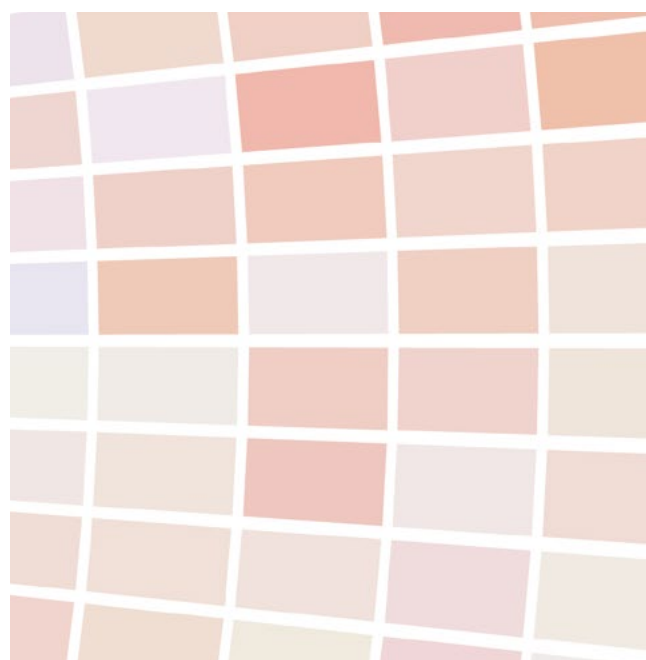
The study highlights systemic inequities faced by small publishers, including:

- ▶ Structural imbalances: Asymmetry of resources and an uneven playing field.
- ▶ Scale disparities: Large publishers enjoy economies of scale while smaller ones face capacity gaps.
- ▶ Financial inequities: Funding flows disproportionately to large actors, leaving smaller ones precarious.
- ▶ Power and influence limits: Large publishers dominate markets, shape norms, and act as gatekeepers.

Policy landscape and interventions

All six countries studied already provide some support for small publishers, and EU-level initiatives (such as OPERAS and the European Diamond Capacity Hub) offer additional infrastructure and collaborative opportunities. However, these are unevenly distributed, often limited in scope, and insufficient to address persistent inequities of scale.

Supporting stakeholders consulted in a second focus group reinforced these concerns, noting that funding for small publishers is especially precarious, that policy and infrastructure remain fragmented, and that cultural change is needed to shift perceptions of quality and prestige. Their perspectives informed the recommendations of this report.



Summary of recommendations

The report concludes that inequities of scale are the most critical barrier to OA transition for small publishers. These cannot be solved by publishers alone; they require systemic interventions by funders, libraries, consortia, universities, and policymakers. The recommendations are grouped into five categories:

1. Funding and sustainability

- ▶ Redirect and ring-fence part of library/consortial budgets for small or values-driven publishers.
- ▶ Provide multi-year, predictable funding streams to remove uncertainty.
- ▶ Support diverse OA models (i.e., Diamond OA, S2O, collective funding models, and existing and equitably priced agreements that work for both libraries/consortia and small publishers).
- ▶ Reduce administrative burdens by scaling requirements to publisher size.

2. Infrastructure and capacity

- ▶ Expand shared services and national/European platforms to give small publishers affordable access to technical and operational tools.
- ▶ Develop plug-and-play toolkits for recurring needs (e.g., metadata, integrity checks, peer review).
- ▶ Invest in training and mentoring, including guidance on AI, accessibility, and policy compliance.

3. Collaboration and networks

- ▶ Fund and strengthen communities of practice (e.g., Society Publishers Coalition, S2O, Open Book Collective, Diamond Capacity Centres).
- ▶ Support cross-border collaboration and coordination mechanisms to reduce isolation.
- ▶ Encourage coalitions of small publishers (commercial, scholarly, and university presses) that preserve autonomy while lowering costs.

4. Quality, prestige, and visibility

- ▶ Enhance discoverability by supporting indexing in Directory of Open Access Journals (DOAJ)/Directory of Open Access Books (DOAB) and similar registries.
- ▶ Celebrate and reward small publishers that meet rigorous standards (registries, awards, and recognition schemes).
- ▶ Promote visibility and trust to counter perceptions of OA as lower prestige.

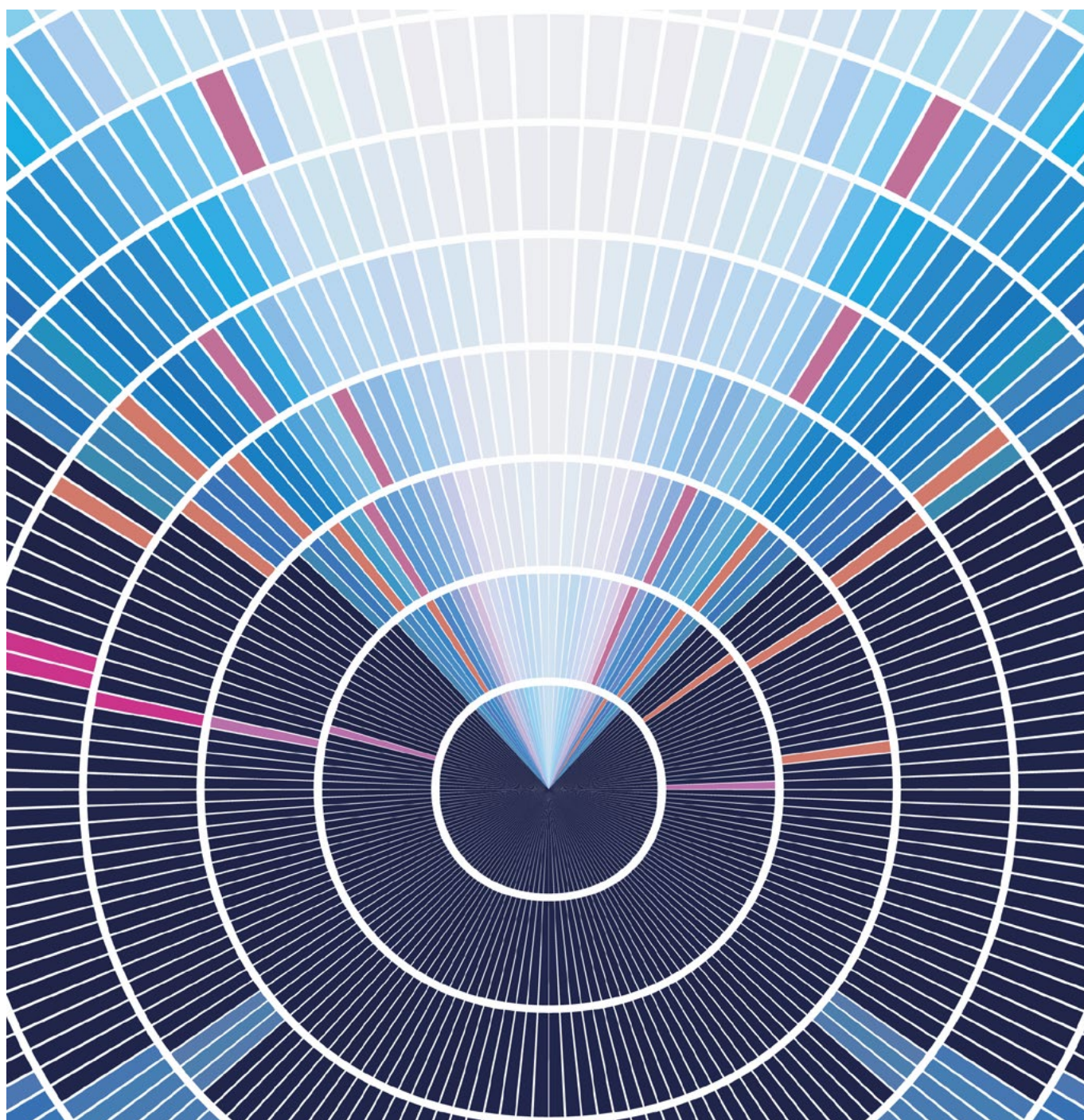
5. Policy and equity of scale

- ▶ Align OA policies and mandates across Europe to reduce fragmentation.
- ▶ Provide longer planning horizons (5–10 years) to allow stability and resilience.
- ▶ Explore differential compliance requirements for small versus large publishers.
- ▶ Distribute funding more equitably (EU/national ring-fenced schemes for Small and Medium Enterprises).
- ▶ Embed bibliodiversity and support for linguistic, regional, and disciplinary diversity as policy goals.
- ▶ Crucially, engage influential subject leaders to shift perceptions of quality and prestige from within research communities.

Conclusion

Open access is widely supported by the small European publishers with whom we engaged on this project. They saw OA as ethically necessary and strategically inevitable. However, without structural reforms, inequities of scale risk marginalising smaller, independent, and mission-driven organisations.

In short, our recommendations call for a system-wide rebalancing: stable funding, proportionate administrative demands, shared infrastructures, stronger peer networks, prestige-building measures, and coordinated policies—all designed to protect bibliodiversity and the independence of small publishers.



Introduction

The Knowledge Exchange (knowledge-exchange.info/) commissioned Information Power (informationpower.co.uk/) to undertake a study designed to support small European publishers in transitioning to open access (OA) publishing. The study aimed to identify and analyse the challenges, both real and perceived, that small European publishers face when transitioning to OA. We also sought to explore the pathways that these publishers consider and adopt in making the transition and to assess stakeholders' perceptions of the benefits, costs, and sustainability of each pathway. Finally, we were asked to develop recommendations to improve the pathways and to identify ways that stakeholders can better support publishers in their OA journey.

Smaller publishers in Denmark, Finland, France, Germany, the Netherlands, and the UK play a key role in scholarly communication. An earlier report¹ commissioned by the Knowledge Exchange found that there are at least 1,029 small publishers produce a minimum of 1,696 journals. Small publishers were defined as those with up to 10 journals and fewer than 240 articles per year. The study used open data sources such as Crossref, DOAJ, Sherpa Romeo, and Unpaywall to identify 1,029 small publishers producing 1,696 journals across KE countries. It concluded that:

- ▶ France had the most small publishers, followed by the UK and Germany.
- ▶ Small publishers are crucial to bibliodiversity, especially in non-English, humanities, and regionally focused scholarship.
- ▶ OA transition is underway but uneven; support mechanisms should consider local languages, disciplines, and economic models.
- ▶ Future efforts should better support discoverability, encourage indexation in DOAJ, and ensure infrastructure sustainability for small OA publishers.
- ▶ Only 6.3% of journals were fully closed access; most were mixed model.
- ▶ OA prevalence was highest among Finnish publishers.
- ▶ Most journals had author-retained copyright and did not charge additional OA fees.
- ▶ Languages: English was dominant overall; French and Finnish publishers often publish in local languages.
- ▶ Subjects: Humanities and social sciences dominated, unlike large databases that favour STEM.
- ▶ Publisher age: The median ranged from 11 to 25 years; French publishers were typically older.
- ▶ Stability: Most journals continued over 2019–2021; few started or ended.
- ▶ Publishing frequency: Quarterly and semi-annual issues were most common.
- ▶ Some publishers (notably in Denmark) used irregular schedules.
- ▶ Open publishers were more likely to publish in English and in the natural sciences.

- ▶ Closed publishers had older journals, more frequent publication schedules (monthly/bi-monthly), and focused more on local languages and engineering.
- ▶ Mixed publishers were the largest group and showed the most growth, introducing 17% of their journals between 2019 and 2021.
- ▶ OA publishers were younger (median age 15 years) than closed publishers (27 years).

These publishers offer vital channels of communication for all subject areas but are particularly important for scholarship in the humanities and social sciences. They also offer academics with particular regional, cultural, linguistic, or thematic interests or needs opportunities to publish and build communities. They publish in European languages, not only in English. Many of these small publishers also publish books.

Key pathways available to enable them to transition to OA include:

- ▶ Partnerships with larger, more commercial publishers.
- ▶ Collaborations and cooperations with diverse partners.
- ▶ Sustainable Diamond OA models that leverage public or institutional technical support and subsidies.
- ▶ Other innovative approaches tailored to their unique needs.

The project team then prepared an interview script and conducted semi-structured interviews as well as two focus groups. Preliminary interviews enabled us to understand the publishers, their concerns, and the perceived barriers and challenges they face, allowing us to refine the interview script. We recorded each interview, produced and cleaned transcripts, and analysed topics, patterns, and themes. Focus groups enabled us to involve and engage a broader group of stakeholders. The first focus group included small European publishers and the second involved stakeholders in a position to support them.

1 Stephen & Stahlschmidt, 2022; <https://zenodo.org/records/7258049>.

Interviews

The Knowledge Exchange asked Information Power to invite for interview 13 publishers involved in an earlier project¹ and which had not yet made a full transition to OA publishing. Ten of the publishers kindly agreed. Interviewees came from society, commercial, university press, and library press perspectives. The organisations ranged from publishing only a single title to many, and included organisations publishing in English and/or in their native language for more national or regional audiences. Concerted effort was made to ensure geographic coverage across Knowledge Exchange countries, and we were able to interview organisations in each with the exception of France. Six of the publishers also had small book programmes, which helpfully allowed us to expand our inquiry to OA book publishing by small European publishers.

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Our interviews with participants explored a range of issues relating to small publishers' experiences with OA and we sought to understand three things. Firstly, we wanted to understand the publishers' attitudes towards OA and their reasoning behind these positions. Secondly, we sought to identify the extent to which OA had impacted their operations: were publishers using particular OA models, were they planning to, why or why not, and what lessons had they learnt? Lastly, we asked interviewees to tell us about the benefits and challenges that OA presented, and about the support they received and/or needed to overcome the challenges.

This overview provides a thematic synthesis structured into five key insight areas: the perceived benefits of OA, concerns and objections, barriers to transition, the dynamics of collaboration, and emerging OA models and publisher experiments.

Perceived benefits of OA

Interviewees were supportive of OA in principle, and they expressed opinions ranging from enthusiastic support to cautious support and optimism. Perceived benefits clustered in three areas: ethical and ideological alignment with the publisher's values, tangible benefits to authors and readers, and tangible benefits for publishers. OA was seen as the future of scholarly communication. One publisher was mildly critical of

Gold OA, and this reflected the widespread deployment of Green OA in their subject area.

Some publishers also framed transitioning to OA **now** as a strategic necessity. Publishers that did not transition to OA were viewed as failing to adapt and "would risk marginalisation in the future." OA was framed as an opportunity to maintain credibility and attract new publications in a rapidly developing ecosystem. One interviewee warned that "the direction of travel is OA and we're going to have to go OA. If we did nothing, it would become harder and harder." Small book publishers were aware that some university funders now requested that books reporting on research they have funded are made openly available. Collectively, these views suggest that some interviewees considered OA as the natural next step for the publishing industry, and that transitioning now would leave publishing houses in a stronger position.

Ethical and ideological alignment

Many interviewees viewed OA as desirable because of their ethical commitments to the equitable and accessible dissemination of knowledge. This motivation was rooted not only in commercial or academic interests, but also in a sense of moral obligation. In total, 6 out of 10 interviewees explicitly referenced a desire to broaden readership, which one summarised as "the right thing to do." Several publishers highlighted OA's potential to bridge the global north-south academic divide and to support the free flow of research to underserved communities.

This was one area in which there was a small but noticeable difference in emphasis between publishers based in a university context and others. These publishers were more likely to report feeling that OA is imperative because research is funded by taxpayers. Some were critical of public funding flowing to commercial publishers. One library-based publisher argued eloquently that because part of the university's core business is to create and share knowledge paid for by the public, that this research must therefore be available to the public at no cost.

2 Stephen & Stahlschmidt, 2022; <https://zenodo.org/records/7258049>

Tangible benefits to authors and readers

Interviewees pointed to benefits for authors, researchers, and readers to explain their support of OA, and five publishers directly referenced increased visibility or readership as a key benefit. Other benefits included greater reach and broader audience engagement. One publisher remarked that OA “helped dramatically with visibility, outreach, and readership of the e-books” while another noted that OA “makes it easier to reach a broad audience, and free access can drive readership.” One journal editor felt OA would “hopefully improve readership, reach, and visibility” as the journal moved to a Subscribe to Open model.

One publisher noted that “younger researchers think differently about OA and don’t expect royalties for book publications,” signalling a generational shift in author expectations. These younger researchers were described as more likely to seek out OA publishing opportunities as they value the free dissemination of research over collecting royalties.

Tangible benefits for publishers

Perceived benefits for publishers also included increased visibility and readership, as well as reputation gains and enhanced ability to attract authors.

Five interviewees reported that OA had improved their key metrics around visibility, outreach, and readership or expressed hope that transitioning would boost these key metrics. One small press noted that it could be more difficult to quantify the readership of OA resources accurately as files can be freely shared, but also confirmed that the transition to OA had dramatically helped to improve readership.

Some participants noted that adopting OA had enhanced the profile and identity of their publishing activities, and was useful in positioning themselves as better partners to the research community than less mission-aligned and larger publishers. OA not only served as a method of distribution but also a mechanism for boosting visibility and carving out a progressive niche.

Several interviewees noted that OA models made their presses more appealing to prospective authors. One publisher explained that, having built a good reputation for OA publishing, authors “specifically come to us because of our fair and affordable open access policies.” Another noted that whilst authors previously may have been unaware, or even hostile, toward OA publishing, they increasingly desire to publish OA and that author attitudes continue to improve with time.

Barriers and concerns

Although interviewees expressed broad support for OA in principle, they also highlighted a series of concerns and barriers that complicate its implementation and sustainability. Key issues related to financial feasibility, operational capacity, prestige and perception, quality assurance, and the nature of collaboration. Taken together, these issues interact to constrain confidence in the long-term viability of OA, particularly for smaller independent publishers.

Financial barriers

All publisher participants were very familiar with the full range of OA business models, a distinct change from earlier research conducted by our team³. There were, however, different views among the participants about whether a steady, reliable funding stream currently exists:

- ▶ Diamond OA was widely considered risky (even by Diamond OA publishers) due to reliance on limited and uncertain funding streams. One warned that “government support seems to diminish every year” and is announced in one go, which is not conducive to recurrent operations.
- ▶ Read and Publish agreements were felt to favour larger organisations better positioned to negotiate complex agreements with diverse libraries and consortia, and monopolising library budgets so that smaller publishers could not get a look-in.
- ▶ Subscribe to Open (S2O) agreements and collective funding models were viewed by some as more promising despite doubts about long-term library commitment and sustainability. On the upside, there is a clear answer to where funding would come from (i.e., libraries), and the perceived advantage over

3 Wise and Estelle, 2020. How society publishers can accelerate their transition to open access and align with Plan S. *Learned Publishing* 33(1):14–27. <https://onlinelibrary.wiley.com/doi/full/10.1002/leap.1272>

Diamond OA is that funding would come from widely distributed libraries.

- ▶ Green OA was sometimes seen as a viable transition pathway, but only in specific subject areas such as mathematics.
- ▶ Only one respondent mentioned advertising or sponsorship, but dismissed these as unreliable and incompatible with the retention of editorial independence.

The funding that **is** available is very challenging for small publishers to obtain because it tends to be short term (1 year or a few years at best), either too concentrated or too piecemeal, linked to different business models and approaches in different parts of the world, and in all cases administratively burdensome. “Larger organisations are more readily able to commit the time and human resources required to meet the administrative and technical requirements of external funders, meaning that revenue funding typically flows to the largest organisations, to the detriment of smaller competitors.”

Operational capacity constraints

The dual challenge of limited staff and the complexity of OA financial administration means that, for smaller publishers, operational capacity itself is a critical barrier.

Many interviewees described running lean operations, often with very few or no full-time staff. This leaves little capacity to apply for funding, focus on quality assurance, resolve copyright and legal issues, or adapt workflows and infrastructure. One respondent explained that “the entire paid staff is one part-time employee,” and noted that any transition to OA would require external support. Another stated that their team was too small to make any significant moves, specifically citing an inability to “foster collaboration” or “develop a system that requires investment.” Several respondents commented that staff were too busy maintaining existing publishing activity and lacked the time to explore pathways to OA, apply for new funding schemes, or experiment with infrastructure upgrades.

The participants emphasised the resource-intensive nature of the OA transition, with the problem not only one of volume, but of complexity. Some admitted that simply monitoring the policy environment was a stretch, let alone actively engaging in implementing policy

changes. One participant highlighted that funder requirements were a burden, asking for requirements for funding applications to be kept to a reasonable level “as there is otherwise a bias in favour of larger competitors.”

Some participants, particularly those in new university and library presses, reported struggling to keep up with the administrative and technical demands of publishing. One respondent noted that it “would be helpful to have technical solutions ready for recurring tasks, e.g., processing and handling of growing amounts of text and data in electronic formats.”

Prestige and perceptions

Interviewees suggested that OA journals were often seen by academic authors as second-tier compared with traditional or hybrid titles, and less effective in supporting academic career advancement. These perceptions have important implications for author submission practices. While this was not a unanimous view, several small publishers we interviewed felt that authors tended to reserve their most prestigious work for commercial publishers and established subscription-based hybrid journals, relegating worthy but secondary projects to OA titles. This cycle reinforces the perception of OA as less prestigious, which in turn undermines its wider legitimacy within academia.

Quality assurance

Interviewees discussed quality assurance at a systemic level. For example, lower barriers to entry exploited by poor-quality and predatory publishers make it essential to have clear and rigorous quality criteria.

Interviewees, particularly those from new university and library presses, also discussed the importance of quality assurance at the journal level, where perceived informality sometimes leads to reduced author effort and lower editorial expectations. One participant described a trend in which authors, particularly retired researchers, have submitted a surprising amount of low-quality outputs, primarily book manuscripts. Another participant argued that institutions must take more responsibility for the scientific outputs released under their name. They stressed that their university press had brought in stricter evaluation processes to safeguard editorial quality, stating, “there is still a lack of quality control [in OA publishing].” A third participant

perceived a risk of good publishing skills being undervalued in OA publishing, especially in its less well-resourced manifestations. Protecting the reputation and rigour of OA publishing was said to require “not just new funding models, but a cultural shift toward institutional responsibility and a retention of meaningful editorial oversight.”

There was unease about the implications of scaling OA publishing without adequate quality safeguards, with some warning that poorly governed OA growth could compromise scholarly standards and professional editorial practices. One risk is that, without adequate funding and capacity for quality assurance, OA publishing could not only be perceived as less rigorous, but could actually become so. This would further exacerbate an already negative cycle.

Collaboration: Challenge and opportunity

Most participants had at least some experience with partnerships, with eight interviewees mentioning either current or past collaborative relationships. The nature of these partnerships—and respondents’ perceptions—varied considerably. Some described productive relationships with like-minded partners, particularly with similar-sized organisations or non-profits. Others described collaboration as complex, time-consuming, and potentially risky.

Six respondents referenced working directly with peers (organisations of a similar size) or expressed interest in doing so. These collaborations served several requirements: sharing digital platforms, aligning advocacy work, co-developing editorial workflows, or pooling limited funding. One participant is part of a collaborative network of five Dutch university presses that share digital infrastructure and ideas, and even host joint conferences. They were generally positive about the collaboration, particularly noting the usefulness of knowledge-sharing and sharing a potential interest in more international collaboration. However, they also felt that each organisation is so stretched for time that the partnership is not used to its full effect. A second participant reported that they “collaborate happily with two non-profit platforms.” Small publishers can, however, be isolated, with one interviewee telling us they would be open to working with other small

publishers but unfortunately they “had few contacts in the publishing world.”

Many respondents discussed the idea of, or experience with, collaboration with larger commercial publishers, but in each case the tone was cautious, sceptical, or even critical:

- ▶ Interviewees voiced strong concern that partnering with large, particularly commercial, entities risked ceding too much editorial influence or operational decision-making.
- ▶ A combination of ideological distance and autonomy anxiety made collaboration with large publishers feel unpalatable, even when such partnerships might offer benefits in the form of resources to reduce the burdens of production or extended reach into the library market.
- ▶ The chief concerns were about maintaining editorial independence and retaining operational decision-making, along with an aversion to the business practices of these larger firms.
- ▶ Three participants said they would “never” consider partnerships with larger commercial publishers.
- ▶ Several respondents framed commercial publishers as a structural obstacle to a healthy and diverse OA ecosystem, accusing them of distorting the market and dominating funding channels.
- ▶ Several cited high article-processing charge (APC) fees and questionable OA practices of large publishers as evidence that their commitment to OA was superficial or profit-driven.
- ▶ Some described larger for-profit publishers as misaligned with the mission and values of small, non-profit publishing ventures.
- ▶ One respondent described commercial publishers as “primarily responsible for many of the undesirable aspects of scientific publishing,” and rejected the idea of working with them due to their “negative influence on integrity and trust.”
- ▶ Another warned that library budgets “tend to be eaten up” by large publishers, squeezing out smaller organisations from funding and attention.

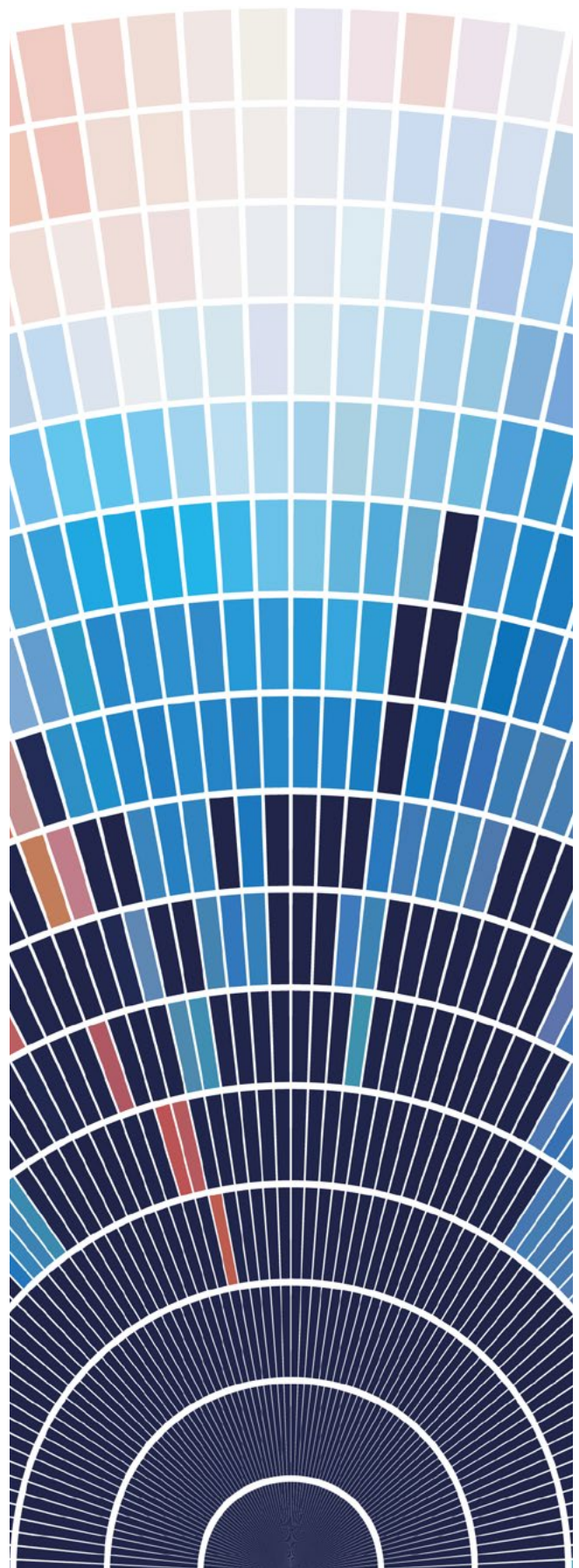
Those with existing partnerships with commercial partners were rather restrained:

- ▶ A respondent with both commercial and university press partners described their arrangement with the commercial publisher as “functional but not particularly collaborative.” The relationship was described as being about practical business matters, and the interviewee noted that while they had “some influence,” the final decisions were always taken by the commercial publisher.
- ▶ The respondent from an organisation in partnership with two large non-profit publishing institutions did not go into detail about their experience.
- ▶ One interviewee was currently negotiating a contract with a mid-sized publisher and was optimistic about this. They hoped that collaborating with a larger publisher would help their journal comply with government accessibility guidelines and reduce day-to-day production work.

By contrast, collaboration with peer publishers was discussed in much more positive terms. Smaller-scale partnerships or partnerships with non-profits were not seen as so threatening to autonomy. These partnerships were viewed as collegial, values-driven, and grounded in mutual respect.

One interviewee with both a commercial partner and a large university press described their partnership with the university press as “brilliant,” enabling access to a platform that would have otherwise been unaffordable. This partnership was viewed far more positively as collaborative, flexible, and helpful in supporting a transition to OA. It provided technical infrastructure and operational support while maintaining a collaborative, rather than hierarchical, relationship.

Collaboration was seen as both a potential solution and a source of concern. Many respondents reported positive experiences of working with mission-aligned peers or non-profits, where partnerships provided shared infrastructure, reduced workloads, and fostered knowledge exchange. These collaborations were generally characterised by mutual respect and the preservation of autonomy.



Focus group 1: Small publishers

Alongside our interviews, we invited five small European publishers to a focus group where they discussed their motivations and pathways for adopting OA business models, the composition of their revenue models, and the key challenges that publishers face when transitioning to OA business practices. Crucially, the focus group allowed us to explore in greater detail what support each publisher believed could help most. These five publishers, comprising university, trade association, and commercial publishers across the Netherlands and the UK, published across a variety of fields in the sciences, humanities, and arts.

The focus group participants demonstrated the diverse ways in which publishers may choose to transition to an OA business model. While some publishers have incorporated OA publishing from the outset (and in some cases have even been entirely OA), others have made a conscious decision to transition their business models over. All transitioners acknowledged that full OA publishing was the goal, but their routes took many forms. For instance, Portland Press has fully converted one journal to OA and their remaining journals to a hybrid model. In contrast, IWA Publishing has flipped four journals to Gold OA, with the remainder adopting a S2O model.

The levels of funding for different fields play a role in the differing adoption of OA. For example, John Benjamins, a small press focusing on linguistics and language studies, has struggled to flip to a fully OA model as authors in these fields are typically unfunded, or receive only small research grants.

Participants identified various drivers for their move to embrace OA business models:

- ▶ Competition and changing author expectations were key drivers from 2021. Many authors could not pay APCs or access subscription content.
- ▶ The COVID-19 pandemic was a major catalyst for biomedical publishers in particular. The groundwork was already laid, but COVID-19 accelerated adoption. During the pandemic publishers removed paywalls, showing the ethical imperative of OA during public health crises. This experience reinforced international consensus that OA should be the norm.
- ▶ The desire to reach new audiences. OA ensures content reaches those who would never buy a publisher's books; for example, readers in distant parts of the globe.
- ▶ Some publishers, particularly those in academic settings that receive public funding, feel a moral obligation to make their work freely available. They express this commitment through their dual roles: as scientists, they advocate for open science, and as public employees, they believe it is essential to share their work with the public at no cost. These publishers have noted that key journals in specific subject areas may struggle to succeed commercially, despite their

academic significance. They also recognise that support from internal university libraries—both financial and technical—plays a crucial role in helping them achieve their mission.

Funding

Funding was the key challenge for these publishers, and was said to underpin the second key challenge identified:

- ▶ The OA world is more resource-constrained for small publishers than for large publishers, which are able to rely on journal surpluses.
- ▶ There is a need for more money, or fewer costs.
- ▶ Read and Publish agreements supported by consortia could work well for small publishers. However, the model is also used by large commercial publishers that aggressively drive volume growth and insist on per-article payments. This means that the model does not scale for libraries.
- ▶ A key challenge is to design a mix of OA models that accommodate varied mandates. Losing subscriptions in one region (e.g., China) to grow OA agreements in others (e.g., North America) has been difficult. Reintroducing APCs for non-subscribers can help to stabilise revenue.
- ▶ Funding OA journal publishing is harder than books, because of the need for recurrent funding.
- ▶ The press does not charge authors but lacks resources for services such as copyediting, which is left to the authors unless externally funded. Some OA journals accept donations, and special projects may receive additional support.

Quality assurance and technology

Several publishers described heightened concerns around quality control and the need for additional investment in quality assurance. Several publishers described new challenges they face to benefit from, or protect themselves from, these and other technological developments:

- ▶ Some society-owned Gold OA journals have been targeted by paper mills, resulting in retractions, formal expressions of concern, and stricter screening of suspicious submissions.
- ▶ A guest-edited journal had to be closed due to exploitation and reputational issues.

- ▶ There have been examples of excessive self-citation, so publishers have appointed integrity officers and improved editorial oversight to address quality threats.
- ▶ Peer review remains a major cost burden as well as a time burden.
- ▶ Smaller publishers face mounting pressure from AI, integrity issues, and technical demands. Maintaining independence is a point of pride, but technological support is becoming critical.
- ▶ Some publishers had been targeted by bots mass-downloading PDFs, which posed technical and cost challenges.

What can/would help most?

- ▶ Clear, easy, continuing support from national policy makers and funders:
 - › Global OA policy alignment... or not: Policy fragmentation across countries/funders raises barriers and costs, particularly for smaller publishers. Either recognise and accept that no single OA approach can work in all places of the world and support our embrace of this diversity, or else do the work to align global OA policies.
 - › Recognising and rewarding universities for their local OA publishing intensity could be helpful.
 - › A lighter administrative burden for claiming the funding that is available would be incredibly helpful.
- ▶ Greater certainty of, and more cost-effective support from, libraries and consortia:
 - › Champion independence: It is important to preserve a diverse OA publishing ecosystem. Help us to remain independent of larger commercial publishing partners. Help smaller commercial publishers compete effectively and maintain their strategic independence.
 - › Create a level playing field:
 - Recognise that large publishers have more flexibility: Large commercial publishers, whether mixed-model or OA-only, can tap into APC funding in ways that we cannot.
 - Redirect funds from current agreements: Re-allocate existing spend to support OA publishing and publishing by smaller publishers that better align with the open ethos. There are helpful efforts in France and the UK that should be scaled. Jisc and UK Research and Innovation (UKRI) have been very supportive of smaller publishers in the UK, but the future is uncertain. Institutions are strained, and yet this support is essential.
- ▶ Evolve policies on acceptable OA licences: While CC BY facilitates broad access, our publishing efforts would be better able to thrive if CC BY-NC were acceptable as it would prevent commercial exploitation; for example, for AI. Perhaps a new CC BY variant is needed that would allow scholarly use but require permission and compensation for training large language models, helping to recirculate revenue to creators and publishers.
- ▶ Collaborate:
 - › Smaller publishers: Can help themselves by working together to build resilience. Community-driven initiatives such as Society Publishers' Coalition (<https://www.socpc.org/>) and the S2O Community of Practice (<https://subscribetoopencommunity.org/>) are really helpful.

- Projects that enable collaboration: Projects, such as this one, that bring us together for peer support and shared learning are enormously helpful.
 - Trade bodies and conferences: Association of Learned and Professional Society Publishers (ALPSP), Open Access Scholarly Publishing Association (OASPA), and UKSG were all mentioned as helpful enabling organisations.
 - Larger publishing partners: Can de-risk technology and smooth revenue.
- Invest in publishing technology and infrastructure for smaller OA publishers:
 - Services such as DOAB, DOAJ, and The OAPEN Foundation (OAPEN) are very helpful.
 - The openjournals.nl initiative in the Netherlands seeks to consolidate publishing infrastructure (XML workflows, editorial tools) across university presses to streamline OA operations. This model could be useful elsewhere.

Analysis: Inequities of scale

In reviewing the helpful information shared with us during the interviews and focus groups, we were struck by the strong degree to which experiences and views are shared across small publishers in different countries, organisational contexts, and subject areas. There was notable convergence in participants' accounts of the perceived benefits of OA, the concerns and challenges they face, and their assessment of the pathways available to them.

One minor disciplinary difference emerged in mathematics with widespread availability of Green OA manuscripts: the availability of manuscripts in arXiv was seen as sufficient to satisfy any OA requirements.

There were some important practical differences between small publishers based in a university/library and other small publishers. Small new university press and library presses:

- Were more likely to report feeling that OA is a moral imperative because research is funded by taxpayers, that it is essential to create and share this information with the public at no cost, and that doing so was part of the university's core business.
- Understood that key journals in specific subject

areas may struggle to succeed commercially, despite their academic significance, and aimed to fill these gaps with their publishing services. They therefore often complemented rather than replaced commercial publishing activities. These publishers offer vital channels of communication for all subject areas, but are particularly important for scholarship in the humanities and social sciences. Additionally, they provide academics who have a particular regional, cultural, linguistic, or thematic interest or need with opportunities to publish and build communities.

- Relied on support—both financial and technical—from university libraries to achieve their mission. However, none appeared to understand the full economic cost of their publishing activities or the gap between how they are currently funded and how they need to be to continue providing high-quality and sustainable services.
- Were more likely to identify the need for support with 'basic' publishing tasks such as generating sufficient submissions, handling volume growth, managing quality assurance, and growing list quality over time.

Small publishers of all kinds are most likely to lack the financial and human resources needed to apply for funding or to build sustainable OA infrastructure. Without improved long-term support mechanisms, accessible and predictable funding routes, capacity-building, and market interventions to make scholarly publishing more equitable for small organisations, the risk remains that small publishers will disappear altogether or lose their independence in the OA transition.

In contrast to the 2022 "Landscape Study of Small Journal Publishers for the Knowledge Exchange" that preceded our project, we are not convinced that the primary challenges facing small European publishers are local languages, disciplinary differences, or economic models. Future support needs to reduce inequities of scale rather than focusing only on infrastructural interventions to improve discoverability and other practical matters.

These are consistent, shared, persistent *inequities related to the organisational size of small publishers*. Smaller publishers face structural imbalances related to asymmetry of resources, and an uneven playing field that distributes opportunities and risks in unequal ways:

Structural imbalances

- ▶ Economies of scale: Cost and efficiency advantages that accrue disproportionately to large organisations.
- ▶ Capacity gaps: Smaller organisations lack the staff, expertise, or infrastructure to compete effectively.
- ▶ Disparity of scale: Differences in size translate into inequitable access to funding and markets.

Financial and operational inequities

- ▶ Funding concentration: Resources flow toward the biggest players, leaving little for smaller ones.
- ▶ Disincentives to scale: Ineligibility for certain types of funding or resources can make it extremely challenging to go from being extremely small with quite minimal resources to small with minimal resources.
- ▶ Operational fragility: Smaller organisations struggle to absorb risks or unexpected costs.
- ▶ Administrative burdens: Compliance and reporting requirements fall more heavily on those with fewer staff.

Many public funding mechanisms also reinforce the vulnerability of small publishers, as they only cover annual expenses and do not allow any money to be saved as a buffer for uncertain times ahead. Larger and commercial publishers have better capabilities to deal with changes and uncertainty in the environment.

Power and influence limits

- ▶ Market dominance: Concentration of control or visibility among a few large players.
- ▶ Outsized influence: Large organisations disproportionately shape norms, policies, or perceptions.
- ▶ Gatekeeping advantage: Larger entities control access to opportunities or audiences.

European policy interventions to address inequities of scale

Inequities of scale are a well-documented issue in European markets (in publishing, and also agriculture, technology, and cultural industries). Policymakers have been experimenting with different interventions to level the playing field between large incumbents and smaller, often more innovative but resource-constrained, actors.

All six of the countries in focus for this project do already provide support that is specifically aimed at smaller publishers, and so does the European Commission. Many of these initiatives help to ameliorate inequities of scale.

Support available specifically to smaller publishers



European Commission

OPERAS is an European research infrastructure that supports HSS scholarship in different ways. OPERAS has many different initiatives, but perhaps the most relevant to smaller publishers is the Pathfinder service (<https://operas-eu.org/services/publishing-service-portal-psp/>).

Pathfinder provides a catalogue of publishing and editorial services offered by OPERAS members. It guides editors, editorial managers, and authors to discover the best service to fit their demands.

The European Commission, national agencies from France (ANR and CNRS) and Portugal (FCCN), and the Bill Gates Foundation funded European Diamond Capacity Hub (<https://diamas.org/>), which aims to facilitate collaboration, including a registry where service providers and publishers can sign up.



Denmark

National shared infrastructures based on Public Knowledge Project's (PKP's) (<https://pkp.sfu.ca/>) Open Journal Systems (OJS) and Open Monograph Press (OMP) software are made available. tidsskrift.dk is for free use by peer-reviewed immediate or delayed OA publications. OpenBooks (<https://openbooks.dk>) provides free access to e-books published by Danish research institutions. The national research funder, Independent Research Denmark, has annual calls for funding competitive multi-year grants for humanities journals published in the country.



Finland

National shared infrastructure based on PKP's (<https://pkp.sfu.ca/>) OJS and OMP is made available for free use for peer-reviewed immediate or delayed OA publications (journal.fi and edition.fi). Public funding subsidies can be applied for by learned societies annually to contribute towards covering publishing expenses. The Finnish Association for Scholarly Publishing has annual grant calls for funding for publishing-related projects among Finnish publishers, and also distributes annual financial support for publishing-related activities among its approximately 150 members.



France

Open Edition (<https://www.openedition.org/>) is a national shared infrastructure to which journals can apply to be published through, either as full immediate OA or through a freemium model where alternative digital versions of the publications are available for purchase.

Another large national infrastructure is Cairn ([Cairn.info](https://www.cairn.info/)), which provides hundreds of French-language publishers with different types of distribution and production services. Most of the content is subscription-based with a delayed OA embargo, but some journals have also implemented S2O models.

A third national infrastructure is Persée (<https://info.persee.fr/>), which makes digitised backfiles of journal articles available OA.

Centre Mersenne (<https://www.centre-mersenne.org/>) is yet another important infrastructure that provides a Diamond OA publishing platform and editorial support tools.

The national research funder Centre National de la Recherche Scientifique (CNRS) provides resources to be applied for by journals, which includes both monetary and technical editing effort from centrally employed resources (<https://www.inshs.cnrs.fr/en/node/8055>).

The Ministry of Research provides funding for international open infrastructures that support small publishers. This includes such services as DOAJ, Open Library of Humanities, and Redalyc.



Germany

The national research funder, DFG, arranged a competitive funding call in 2024 for supporting journals in the process of converting to OA. It is also the funder behind the newly founded German Diamond Capacity Centre (<https://diamond-open-access.de/>), which aims to enhance the level of coordination and collaboration among existing and prospective Diamond OA publishers. At the moment there is no national technical infrastructure for OA publishing nor public funding mechanisms providing funding for supporting continuous publishing operations.

Konsortiale Open-Access-Lösungen Aufbauen (KOALA; <https://projects.tib.eu/koala/>) is a German library-backed consortium that provides multi-year funding stability via thematic packages of journals from different publishers.

This supplements S2O funding, reducing reliance on subscriptions.



The Netherlands

Shared infrastructure based on PKP's (<https://pkp.sfu.ca/>) OJS is made available for use by Dutch university publishers, research institutes, scientific societies, and other academic organisations (<https://openjournals.nl/en/>).

There is no national-level funding for supporting Diamond OA publishing, but some universities are involved in supporting such publishers on a smaller scale.

Libraries provide some support for international open infrastructures on a case-by-case basis. For example, Utrecht University supports the CLOCKSS digital archive (<https://clockss.org/>).

The research funder, NWO, provides support for international open infrastructures such as DOAJ (<https://doaj.org/>), DOAB (<https://www.doabooks.org/>), and OAPEN (<https://www.oapen.org/>).



UK

Support for small OA journal publishers comes indirectly, via authors or libraries.

UKRI offers grants to help researchers comply with its [OA policy](#) by funding alternative OA models, including Diamond OA, and by subsidising book processing charges for other models. Additionally, UKRI and Jisc are developing toolkits and resources to help smaller publishers transition to OA, supporting initiatives such as the [Open Book Collective](#).

The Jisc library consortium prioritises national agreements with smaller publishers, both commercial and not-for-profit. Libraries pay to participate in these agreements from university funds or UKRI block grants.

Funders (e.g., UKRI, the British Academy, and the Wellcome Trust) collaborate with publishing trade bodies (e.g., ALPSP and OASPA) to commission research on the challenges facing smaller publishers and the development of tools to help them overcome these challenges. Through the Knowledge Exchange these approaches are being internationalised.

Libraries support international open infrastructures on a case-by-case basis.

Focus group 2: Stakeholder support for small publishers

At this point in the project we shared an overview of our discoveries and analysis, and invited a set of supporting stakeholders to discuss how best to support small publishers to overcome the challenges they had identified.

The stakeholders came from 17 different organisations across all six Knowledge Exchange countries and beyond.

Participants served in an array of roles and organisations, and included national policy makers (with responsibility for OA, open science, researcher excellence, researcher integrity), national funders, university leadership (e.g., with responsibility for GLAM services, the university press, and OS), university library leadership, university press leadership, publishing member organisations (e.g., for learned societies, small publishers in a specific country, or OA publishers), library consortia, national libraries, and infrastructure providers (e.g., delivery of national open journal and book platforms, DOAB, OAPEN, OPERAS), the Copim project, the European Diamond Capacity Hub, Open Books Hong Kong, and publisher partnership managers. We also had a new university press and a small society publisher.

This discussion was wide-ranging but clustered around five themes: funding, pathways, fragmentation, quality and prestige, and the actions that supporting stakeholders perceived they could or could not take in support of small publishers.

Funding

There was little surprise that funding had been identified as *the* major issue, and there was sympathy for the especially difficult plight that small publishers find themselves in. They have few resources, and so bear greater risk.

For a small, poorly resourced publisher, even modest investment—commissioning a new book, negotiating with a library, attending a trade association meeting, hiring a designer—can represent a large portion of their budget. If the initiative fails, it may jeopardise their ability to pay staff, keep the lights on, or publish the next book.

A large publisher, by contrast, can spread the costs of a single project across a much bigger portfolio. One underperforming title is absorbed by dozens of others that are generating an income, and one unsuccessful library negotiation is offset by another that is successful.

One problem is, of course, that there is no new funding, and so funders and policymakers need to stop supporting things they are doing now to free up money to spend elsewhere. Funders and policymakers in Europe are still discussing and planning how to make changes to provide more support for OA generally,

including for small publishers. The high-level strategy might appear simple (i.e., stop putting money toward big publishers), but the practical changes required to achieve this could be complicated (e.g., cancelling subscriptions to redeploy money in support of Diamond OA) and they are wary of unintended consequences.

Another challenge is that funders and policymakers can mostly act indirectly with respect to small publishers. They can provide infrastructure and they can offer advice and guidance, but rarely can they provide direct funding. The exception to this in our project was Learned Societies in the Nordic countries, which do not generate a profit and are therefore eligible for public funding. Even here there are limits, and one person commented to us “This national funding is constrained, limiting our ability to launch new titles in new subject areas or in languages such as Sámi.”

Instead, funders and policymakers channel money to authors and university libraries. These beneficiaries can pay for OA support. The money may be used to pay OA publishers for specific content and can also be used more generally to support infrastructure or new university and library presses.

This presents particular challenges for small commercial publishers that cannot receive direct grant funding, are reliant on sales revenue, and yet are often at the back of the queue or entirely ineligible for library or consortial negotiations. There is money in the system, but it is locked in budgets that are inaccessible to small publishers, and particularly small commercial publishers. Therefore, it is not only funders and policymakers but also authors and libraries that need to make practical changes to enfranchise small publishers in an OA world.

“Think about smaller, commercial publishers—we have many good ones in the Netherlands and the UK, for example. They also want to move toward OA and also lack funding and infrastructure. They would need to invest to transition to OA, but this is very difficult. They are reliant on sales revenue, not grant funding, and this means different OA models (e.g., S2O rather than Diamond OA).”

Pathways

Hopefully it is clear from the preceding section that one OA funding model does not fit all, and yet so much of what we heard during our project was competitive advocacy for one model over another. Funding for smaller publishers to collaborate with one another, or more broadly, was often tied explicitly to one model or another rather than being funded in and of itself.

Subscribe to Open

Librarians were in favour of the S2O model as well as Diamond OA. They appreciate the transparency of the S2O model and the choice this offers to support the changing needs of their local user community.

Diamond OA

A hidden funding issue is that much Diamond OA publishing relies on voluntary effort and hidden subsidies, and more insight into the true costs of supporting this approach at scale would be helpful for stakeholders.

The European Diamond Capacity Hub would like to see a distributed, strong network of Diamond OA national centres that would provide leadership, unity, and diversity. The aim of this coordination would be to align OA journals (in the first instance) to an identical set of standards to avoid unnecessary duplication and to benefit from complementarities.

Consortial negotiations

It is exceptionally difficult for small publishers to handle engagement with the very many and diverse libraries and consortia that exist around the world. In most countries, the national consortium has a mandate to seek the most significant savings, and these are achieved by working exclusively with the largest publishers. While some library consortia are good at creating a special channel for small publishers to make agreements, views about which OA models are acceptable can differ.

The European Diamond Capacity Hub will support any publisher as long as academics own the titles they publish; the publishing and production can be handled by commercial entities. This would appear to rule out small commercial publishers but include larger organisations that publish on behalf of community-owned titles.

Fragmentation

A recurrent topic in discussion was the challenge of fragmentation—in leadership, in planning, in funding, and in infrastructure. Greater national, European, and ideally international alignment was seen as likely to decrease costs for all stakeholders and facilitate sustainability. Small publishers, infrastructure providers, libraries, consortia, and other stakeholders identified a need for more clarity and direction, ideally over a longer planning horizon. There was appreciation that no one yet knows what the perfect end state is, but it would be helpful to know what the plan is for the next 5 or, ideally, 10 years. Funders were identified as the stakeholders best placed to promote collaboration and facilitate coordination.

The number of small publishers was also cited as a challenge, as it is challenging for funders, libraries, and infrastructure providers to work with thousands of small publishers effectively. Recognisable collaborations or coalitions of small publishers would be welcome. Communities of practice are successful forms of clustering and should be supported (e.g., S2O community of practice, and the Society Publishers Coalition). It was also recognised that collaboration between small publishers takes place in the context of competition between publishers for authors and fundings, and so stakeholders might need to fund coordinating mechanisms to facilitate these communities and manage any conflicts of interest.

“The fragmentation in leadership makes it difficult to have a common purpose and to share infrastructure, ideas, and values. With these in place, we could do amazing things. What I don’t see at the moment, in Europe, is us coming together actively enough to find solutions that we can all adopt.”

Quality and prestige

There was a long, interesting discussion about perceptions of quality and prestige, but what this all boiled down to is *author choice about where to publish*.

To repurpose funding to support sustainable approaches to OA, and to support small publishers, there needs to be enough demand *from academic leaders* for change. It is not really about quality or prestige per se, and instead is more about changing research culture.

Perceptions of quality and prestige of publishing venue depends on a number of inter-related factors:

- ▶ **Format** (e.g., books vs. journals).
- ▶ **Language** (“We have many high-quality Danish journals, but often we have found difficulty in getting them recognised because they are not published in English. These are not bad journals; they are Danish journals”).
- ▶ **Rankings**. National and international rankings influence career advancement decisions. In some countries (e.g., Finland) government funding models rely on these rankings.
- ▶ **Subject area** (e.g., SHAPE vs. STEM subjects, and there are more granular differences).
- ▶ **Transparency** (“For large book publishers, peer review practices are often completely opaque, but smaller OA book publishers are typically more transparent”).
- ▶ **Variability** (“A high-quality publisher in one subject could be dismal in another”; “Quality is related to peer review, though norms vary across disciplines”).
- ▶ **Visibility** (“Small publishers are not as visible and are not as highly ranked as larger publishers”).

“When an author is looking at small publishers there is a certain amount of homework involved that is not necessary when contemplating publishing with a larger publisher.”

Encouraging uptake of what are less well known or perceived as lower-prestige publication venues is a challenge. Understanding and overcoming resistance to change is multi-faceted:

- ▶ **Behavioural conservatism**: Researchers behave as if journal branding matters, even when they are told it explicitly does not (e.g., for the UK REF).
- ▶ **Complexity**: “Researchers cannot be expected to keep up with everything that is going on in OA and with publishing.”
- ▶ **Definitions**: The group discussed whether it would be useful to reframe prestige as quality, and unite around shared quality standards for OA publications. It was recognised that there are different definitions and types of quality (e.g., quality of metadata is different to quality of the research output).
- ▶ **Goals**: Why should researchers want to change the culture of a system that they feel has worked well? We need to connect OA publishing with other drivers (e.g., equity and inclusion). There was also a view expressed that “we need to hammer the message—that OA is good in and of itself—on a further and wider basis, to do more consciousness-raising.”
- ▶ **Motivation**: Complexity and mandates mean that the reaction to OA from many researchers is “this is an absolute bureaucratic pain; another hoop I need to jump through.”
- ▶ **Precarity** has increased for researchers. For example, 68% of researchers are on fixed-term contracts in the UK, according to the University and College Union. This may undermine their ability to take risks when publishing.

“Our new university press knew we had to offer a very high service level if we wanted colleagues to recommend us as a great place to publish. Quality and service provision are really critical, particularly for smaller publishers.”

Actions that supporting stakeholders perceive they could—or could not—take in support of small publishers

There were various suggestions about ways to provide more support to small publishers.

Jisc shared the outcomes of a recent pilot project.

“Through careful analysis of the national affiliations of authors, readers and editorial board members we have been able to support about 12 journals to flip to what is essentially S2O. Taylor & Francis choreographed the analysis and change, and the UK and Nordic countries have provided funding because a critical mass of the supporting academic community came for the UK and Nordic countries.” They suggested that the approach could be adopted more broadly to identify which countries should pay to flip specific titles to OA, albeit with a different ‘choreographer’.

Strong university leadership championing OA was widely perceived as hugely enabling to ensure that all parts of the institution understand the benefits and are willing to invest in funding sustainable OA models from a diverse array of publishers. Not all institutions are yet in this position, or have the same motivation.

We asked participants whether funders and policymakers in their countries have the power/flexibility to institute different requirements for smaller and larger publishers, or whether their institutions could have lighter-touch requirements for smaller players (e.g., in metadata)? We were told:

- ▶ “Our policies don’t vary by size of publisher, and although we see the need it is challenging for a funder to vary policies in this way. Don’t even know if it would be legal for us to do this, especially as we have an indirect relationship with publishers via universities and researchers.”
- ▶ “From an institutional perspective, the answer to the question about having differential policies for smaller publishers is ‘almost certainly not’ as preferential treatment for SMEs would undermine academic freedom.”
- ▶ “Might it be easier to have ring-fenced funding for ‘values-based’ publishing, however defined? Libraries could then pivot funding if specific criteria or values are met.”

We learnt that in China and Hong Kong the ambition for OA is for research to be more widely accessible, for the research to have a greater impact, and for a financially sustainable model to be created: “Established publishers can argue that they have managed the first two of these goals, and that therefore they deserve more money. This makes it challenging to repurpose money, but we are hoping to change this—there is enough money in the system, we’re just not using it right. We are in favour of OA in principle, but waiting for stable, sustainable models to emerge. For researchers, ranking is the name of the game. If you don’t publish in a title that helps with your university’s ranking, then the publication doesn’t count for promotion. In China, there is a particular interest in OA to help the Global South and for China to be a supporter in this. China led an initiative announced last year at the G20, where China, Brazil and South Africa committed to an open science approach that would benefit the Global South. That hasn’t translated into policy yet, but it’s being worked on.”

Recommendations

Our findings strongly suggest that inequities of scale are the critical barrier to OA transition for small publishers. Small publishers—whether commercial or non-profit—**need stable funding from a mix of sources, shared infrastructure, peer networks, and policy recognition** to sustain their role in bibliodiversity and to play a full role in open scholarship. Stakeholders—funders, consortia, libraries, universities, and policymakers—must rebalance resources to level the playing field. Size disparities must be addressed, not just through technical or policy reforms, but through a broader realignment of incentives, recognition, and responsibility across the scholarly ecosystem.

Inequities of scale cannot be solved by small players alone. Interventions need to rebalance the system: redirecting funding flows, lowering administrative burdens, ensuring fair competition, and creating collective infrastructures.

1. Funding and sustainability

Key issues: Small publishers face short-term grants, increasingly precarious finances, heavy administrative burdens, and inequitable access to library budgets.

Recommendations:

- ▶ Ring-fence library budgets: Redirect a portion of consortial/library funding specifically for small or values-driven publishers.
- ▶ Stabilise funding: Create multi-year, predictable, funded pathways for small publishers (via national funds or European schemes) to remove year-on-year uncertainty.
- ▶ Support diverse OA models (i.e., Diamond OA, S2O, collective funding models, and existing and equitably priced agreements that work for both libraries/consortia and small publishers).
- ▶ Lighten administrative burdens: Funders and consortia/libraries should simplify application and reporting requirements, with proportional obligations for smaller players.

2. Infrastructure and capacity

Key issues: Small presses run on minimal staff and struggle with technical and operational demands (e.g., peer review, metadata, policy monitoring, and compliance).

Recommendations:

- ▶ Invest in shared services aligned with the Principles of Open Scholarly Infrastructure (POSI), the Global Sustainability Coalition for Open Science Services (SCOSS), and Invest in Open Infrastructure (IOI), which provide mutually reinforcing frameworks for identifying which such infrastructures to support. See Appendix 1 for additional information and a list of essential open infrastructures that support small OA publishers.
- ▶ Provide technical toolkits: Develop “plug-and-play” tools for recurring needs (plagiarism checks, integrity screening, metadata export, DOI assignment).
- ▶ Capacity-building programmes: Fund training and mentoring for small publishers in areas such as whether and how to provide content to AIs, collaboration with consortia and libraries, accessibility, and quality assurance.

3. Collaboration and networks

Key issues: Isolation is a recurring problem. Collaboration with peers is valued but under-utilised; partnerships with large commercial publishers are often mistrusted.

Recommendations:

- ▶ Support communities of practice: Invest in collective initiatives (e.g., Society Publishing Coalition, S2O, Open Book Collective, Diamond Capacity Centres) to strengthen peer networks and mutual aid.
- ▶ Broker cross-border coalitions: Fund coordinating mechanisms that enable small publishers to work with multiple consortial/library groups.
- ▶ Broker collaboration between communities of mission-aligned small publishers: Encourage collaboration between small commercial publishers, university presses, and scholarly societies to lower costs while preserving autonomy. An example of successful collaboration between WHP and Liverpool University Press (LUP) is presented in Appendix 2.

4. Quality, prestige, and visibility

Key issues: Publications from small publishers risk being invisible and undervalued, which adds to the challenge that some authors perceive OA publications as less prestigious. Quality concerns (e.g., paper mills, maintaining quality while scaling up) add to reputational risks.

Recommendations:

- ▶ Prestige and quality perceptions are going to remain important, so small OA publishers need sufficient funding to provide prestigious quality services.
- ▶ The Diamond OA Standard has an important role to play here, but it would be better to have a standard that promoted good practice no matter the OA funding model used by mission- and values-aligned small publishers.
- ▶ Public recognition: Celebrate small publishers that meet rigorous standards, helping them compete on trust and prestige, not just scale. For example, Knowledge Exchange partners could develop a simple registry for small European publishers and celebrate their successes with OA publishing through an awards scheme.
- ▶ Promote discoverability: Increase support for indexing in DOAJ and DOAB to boost visibility.

5. Engage subject leaders

Key issues: To shift perceptions about what counts as high-quality and prestigious research publishing, change must come from within each research community. This cannot be imposed externally.

Recommendations:

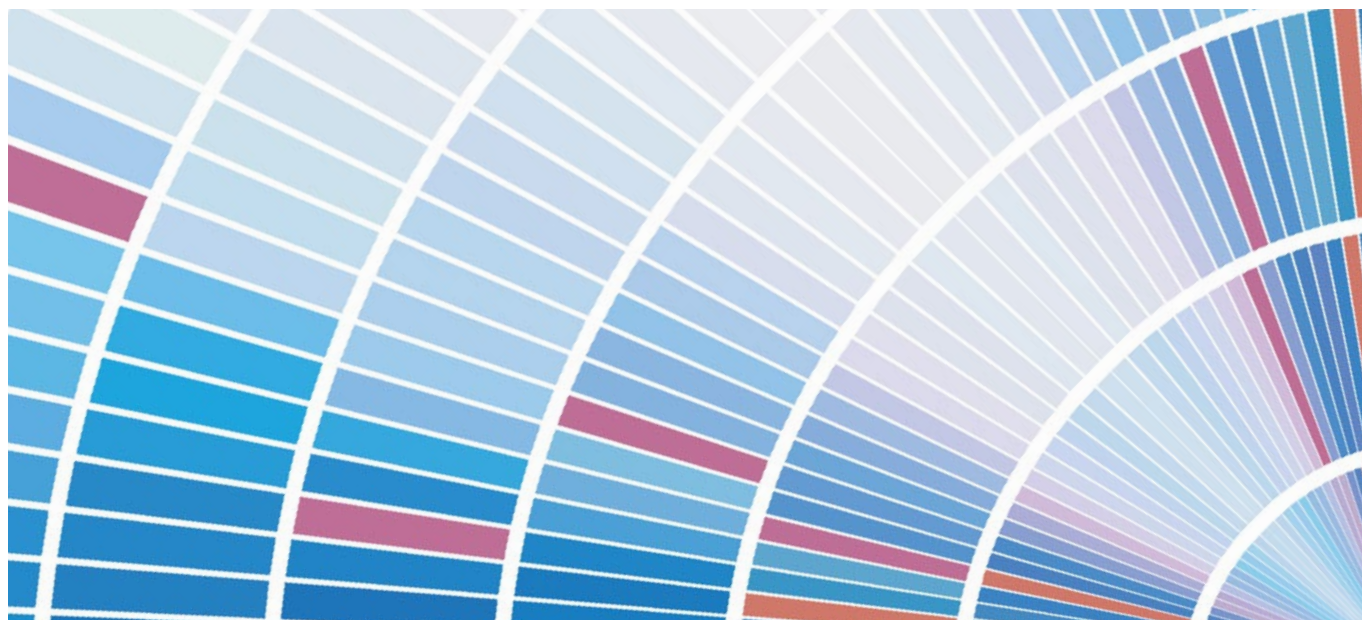
- ▶ Engage subject leaders: Proactively involve respected, influential researchers in every discipline.
- ▶ Focus engagement strategically: This is not just about advocacy for OA or small publishers. It is about understanding each field's culture, priorities, and publishing traditions.
- ▶ Work at scale: Efforts should take place both at the national and European levels, not just institution by institution.

6. Policy and equity of scale

Key issues: Inequities of scale—structural, financial, and political—favour large publishers. Fragmentation of policies and infrastructure adds to the cost burden for small publishers.

Recommendations:

- ▶ Policy alignment: Funders and governments should reduce fragmentation by aligning OA mandates and support schemes across Europe. Support all OA models aligned with research community values and principles.
- ▶ Increased planning horizon: Small publishers would benefit from a 5–10-year planning horizon and/or the ability to build somewhat larger surpluses to enable them to self-organise a 5–10-year planning horizon.
- ▶ Size-sensitive policies: Explore differential compliance requirements for small versus large publishers (e.g., metadata depth, reporting).
- ▶ Equitable funding distribution: EU programmes such as Creative Europe, Horizon Europe, and SME Instrument earmark funding specifically for smaller players, insulating them from competition with large corporations. National initiatives would also be useful.
- ▶ Protect bibliodiversity: Embed publishing diversity as a policy goal at European and national levels and ensure that linguistic, regional, and disciplinary diversity is supported.



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Appendices

Appendix 1: International OA publishing infrastructures

Appendix 2: The White Horse Press case study

Appendix 3: Aarhus University Press case study

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Appendix 1:

International OA publishing infrastructures

A resilient OA ecosystem depends on shared, community-owned infrastructure that is transparent, sustainable, and globally inclusive. Small publishers particularly rely on affordable, interoperable tools for hosting, metadata, identifiers, preservation, and analytics. Therefore, funders, libraries, and policymakers can support small publishers by supporting community-owned open infrastructure.

Three complementary initiatives—POSI, SCOSS, and IOI—provide mutually reinforcing frameworks for identifying which such infrastructures to support:

- ▶ POSI (<https://openscholarlyinfrastructure.org/>) defines the governance, transparency, and sustainability principles that make infrastructures trustworthy.
- ▶ SCOSS (<https://scoss.org/>) coordinates collective, multi-year funding for open infrastructure services that cannot raise adequate funds independently.
- ▶ IOI (<https://investinopen.org/>) analyses the health of the open infrastructure ecosystem, promotes equitable global participation, and advises on strategic, data-driven investment.

Supporting infrastructures that align with at least one of these frameworks strengthens the wider system on which small and mission-driven publishers depend. Contributions to these initiatives help ensure that essential services remain community-owned, transparent, and technically sound.

Function	Infrastructure	Alignment
Metadata and identifiers	Crossref DataCite ORCID ROR OpenCitations Thoth	POSI / SCOSS
Discovery	DOAJ DOAB OAPEN OpenAlex OPERAS OpenCitations	POSI / SCOSS POSI / IOI
Hosting platforms	PKP Janeway Fulcrum OPERAS Scielo Redalyc / AmeliCA AJOL	POSI / SCOSS IOI
Preservation	CLOCKSS PKP-PN	POSI / SCOSS
Usage metrics	COUNTER	POSI / IOI
Messaging	OA Switchboard	POSI / IOI

These infrastructures provide the technical, organisational, and policy backbone of open research communication. They enable small publishers to participate in a coherent, interoperable ecosystem rather than depending on proprietary or fragmented systems. Supporting these complementary initiatives will strengthen the shared infrastructure on which small publishers' capacity depends—ensuring that OA remains not only open but also sustainable, fair, and globally connected.

Appendix 2:

The White Horse Press case study

Introduction

The White Horse Press (WHP) is an independent, family-owned scholarly publisher founded in 1991. The Press publishes a range of high-quality academic journals and books, with a focus on environmental perspectives in the social sciences and humanities. It is innovating and adapting to the evolving OA landscape through a combination of collaborative partnerships, community-backed funding models, and strategic diversification and striving to balance financial sustainability with its mission-driven goals.

Current journals

- ▶ *Environmental Values*: A subscription Journal with a paid OA option available
- ▶ *Environment and History*: A subscription Journal with a paid OA option available
- ▶ *Global Environment*: A S2O journal
- ▶ *Nomadic Peoples*: A S2O journal
- ▶ *The Journal of Population and Sustainability*: Entirely OA—no charges are made to authors or readers

Conceived as OA journals

- ▶ *Climates and Cultures in History*: A S2O journal
- ▶ *Worldwide Waste*: A S2O journal
- ▶ *Plant Perspectives*: A S2O journal

In addition to journals, WHP is building an expanding OA book list of monographs and edited collections. These works align with its journal themes, often exploring environmental and cultural history, conservation, and the history of environmental ideas.

WHP is actively testing various revenue models to sustain both its journal and book publishing programmes.

Drivers for OA

WHP is strongly committed to transitioning its publications to OA, driven by several key motivations:

- ▶ **Increased Reader Engagement:** OA enhances visibility, access, and impact for authors.
- ▶ **Support for Environmental Challenges:** Free access to research supports global environmental efforts.
- ▶ **Strategic Preparedness:** Anticipating an industry-wide OA tipping point and ensuring WHP is ready to adapt.

OA revenue models

Journals

Subscribe to Open

WHP is experimenting with the S2O model for five of its journals. This model allows libraries to support OA by maintaining their subscriptions, which, if sufficient, trigger the journal to be published openly for that year.

Why S2O?

- ▶ Lower-risk model suited to smaller publishers.
- ▶ Requires no APCs, benefiting authors.
- ▶ Encourages institutional support without excluding smaller players.

Declining subscriptions across the board remain a challenge. However, some libraries have supported WHP's OA transition through the S2O model.

Strategic collaboration with LUP

WHP partners with LUP, which:

- ▶ Manages subscriptions.
- ▶ Hosts three WHP journals on the advanced Atypen platform.
- ▶ Provides shared infrastructure and expertise.

This collaboration has significantly supported WHP's OA transition through what is effectively an *aggregation model*, where smaller presses benefit from shared resources and visibility.

Diamond OA

One of WHP's journals operates under the Diamond OA model (free to read and publish). It is editorially independent and operational costs are supported by a mission-aligned campaigning organisation. While effective, this model carries financial risk, as continued funding depends on the supporting organisation's budget priorities.

Hybrid publishing

One WHP journal is published in partnership with a large corporate publisher under a hybrid model. This journal:

- ▶ Is a flagship publication in its field.
- ▶ Generates significant revenue.
- ▶ Connects WHP with key scholarly communities.

While WHP retains some influence, ultimate control over the revenue model rests with the corporate partner. Due to its importance, this journal is managed conservatively to minimise financial risk.

KOALA Consortium

Two of WHP's journals (2025–2028) receive partial funding through KOALA, a German library-backed consortium that:

- ▶ Builds thematic packages of journals from different publishers.
- ▶ Offers multi-year funding stability.
- ▶ Supplements S2O funding, reducing reliance on subscriptions.

Journal platforms

As mentioned above, LUP hosts three WHP journals on the advanced Atypen platform, a platform WHP would not be able to afford on its own. For other journals, WHP also uses the OJS, an open-source journal publishing platform managed by PKP.

Books

Book processing charges

WHP's OA book publishing is supported partly through book processing charges, where authors (or their funders) pay upfront to cover publication costs. This model reduces financial risk for WHP and suits books with traditionally low sales.

Collective funding models

WHP has tested collective funding initiatives with mixed results:

- ▶ **Knowledge Unlatched:** Provided some support but with limited impact.
- ▶ **Open Book Collective:** More efficient, offering general support not tied to individual titles, which WHP found more beneficial.

Other experiments

- ▶ WHP has also piloted alternative models such as 'Adopt a Book,' which involves library sponsorship. While results are modest, such models add diversity to WHP's funding portfolio.
- ▶ As a publisher rooted in environmental scholarship, WHP upholds strong sustainability principles and is a Green OA publisher, allowing authors to post their own electronic versions of their papers (pre-copyediting) without embargo before or after acceptance for publication, an individual book chapter from a multi-authored collection, or up to 10% of a monograph for which they are sole author.

Appendix 3:

Aarhus University Press case study

Background

Aarhus University Press (AUP), led by Director Anne Engedal, is the largest university press in Denmark and the Nordic region. Although affiliated with Aarhus University, AUP operates independently and publishes scholarly and public-oriented books from researchers across all Danish universities. With a strong reputation for peer-reviewed monographs and anthologies, AUP maintains a dual focus: academic excellence and broad societal impact.

Over the past decade, AUP has fully integrated digital publishing into its operations, releasing all titles as e-books and producing audiobooks for major series. As the publishing landscape evolves, the press is increasingly exploring OA models, balancing accessibility with financial sustainability.

Aarhus University Press demonstrates how OA can be thoughtfully integrated into a traditional academic publishing model. Through adaptive strategies, diversified funding, and technical readiness, the press is carving a pragmatic path, one that balances the ideals of open scholarship with the realities of editorial cost and economic sustainability.

Publishing portfolio

AUP maintains a diverse catalogue, publishing around 100 titles annually across academic and mainstream genres. Notable series include:

- ▶ **Tænkepauser** (“Reflections”): Short, accessible books (~60 pages) tackling broad topics, published in partnership with Johns Hopkins University Press. This commercially successful series has sold over a million copies.
- ▶ **100 Danmarkshistorier**: A completed series funded by foundations, focusing on Danish history.
- ▶ **Science Faction**: Exploring natural sciences, also foundation-supported.
- ▶ **Pædagogisk Rækkevidde**: A hybrid model series targeting educators, available in both print and OA formats for union members.

These series demonstrate AUP’s ability to serve both niche scholarly fields and general readerships.

OA initiatives

AUP’s engagement with OA is strategic and case dependent. A flagship example is the Magt & Læring (“Power and Learning”) series, commissioned by the Danish Parliament. Comprising 45 research-based titles assessing Danish democracy in 2025, this series will be OA in digital format, while print editions are priced affordably (~100 DKK). The open model was mandated due to the public relevance of the subject.

Anne Engedal emphasises that decisions around OA are shaped by multiple variables:

- ▶ Editing complexity
- ▶ Illustration/content format
- ▶ Author preference
- ▶ Funding availability

Open access is more feasible for straightforward, text-heavy works that are less resource-intensive.

Funding and economic sustainability

AUP operates on a non-profit model, reinvesting any surpluses into further publishing within the same discipline. Most OA projects require foundation support, yet full funding is rare. Titles typically rely on a mixed revenue model, combining sales, grants, and occasionally author contributions.

Foundations like the Carlsberg Foundation now explicitly support open dissemination, creating new opportunities for OA. Additionally, researchers can apply for dissemination grants through the Independent

Research Fund Denmark, although publishers themselves are ineligible to apply.

Royalties present another dimension. While most AUP authors are salaried researchers and less dependent on royalties, precariously employed academics may view OA as financially disadvantageous, which can limit participation.

Technical and market considerations

In recent years, AUP has upgraded its infrastructure to support OA distribution. E-books are made available through JSTOR and AUP's own website, both as PDF and EPUB files. Despite this, challenges remain—particularly with bookstore engagement. When content is free online, retailers often deprioritise stocking the print versions, reducing physical visibility.

This raises key concerns:

- ▶ Will OA titles cannibalise print sales?
- ▶ Can foundation funding reliably replace market revenue?
- ▶ How does free digital access impact long-term reader expectations and willingness to pay?

These questions are central to AUP's OA strategy going forward.

Strategic implications and sector positioning

In Denmark, AUP stands out as a leader in academic publishing and OA experimentation. Few other university presses in the country have ventured deeply into OA, and commercial publishers—focused largely on fiction—remain dependent on traditional sales.

AUP's approach illustrates the complexity of implementing OA in a mixed publishing environment. The press must weigh:

- ▶ Accessibility versus sustainability
- ▶ Research integrity versus commercial viability
- ▶ Public service versus editorial investment

According to Engedal, the goal is not to adopt OA indiscriminately but to sustain a diverse publishing ecosystem that includes both free and paid content.



Appendix 4:

Mathematica Scandinavica

Background

Mathematica Scandinavica is collectively owned by the mathematical societies of Finland, Denmark, Norway, Iceland and Sweden. There are five national editors—one appointed by each of the societies. The owning societies are very hands-off. There is a Nordic congress of mathematicians every 3 years, which can be a venue for discussions about the journal, but otherwise it is left to the Coordinating Editor to manage unless there are major issues.

The journal is currently hosted by the Royal Danish Library using OJS. However, from 2026 it will be published by Mathematical Sciences Publishers (MSP; www.msp.org).

The journal has one part-time employee, who is in charge of subscriptions, accounts, contact with the printer, and so on. The Coordinating Editor and other editors are all volunteers.

Journal

The societies own one journal: *Mathematica Scandinavica*. The journal publishes 20–30 papers a year, running to 640 pages in a relatively small page format (equivalent to about 400 pages of A4).

Open access

The journal is paywalled. Archival content is opened after 5 years. The journal operates a Green OA policy for author self-archiving with no embargo period.

There is pressure from the universities and funders to publish in some form of OA. All Danish universities, for example, have this as a requirement. Green OA (depositing author manuscripts—either preprints or accepted manuscripts—in university repositories or on servers such as <https://arxiv.org/>) is an acceptable way of satisfying this requirement.

There is no great pressure from mathematicians for OA. In general, they have access to journals through their libraries, and if not, they are generally quite happy to use Green OA versions (particularly arXiv). Mathematicians do not generally have access to large research grants.

A further complication is that mathematics is still an area in which print is considered important. *Mathematica Scandinavica* has 220–230 subscribers, of which 150 include print. This is changing over time, but more slowly than in other fields.

With regard to other possible OA models:

- ▶ There is no obvious funding source for Diamond OA. National funding initiatives would be complex to access as the journal straddles five different countries.
- ▶ APCs are not viable. The journal does not receive enough submissions to make it work financially. Mathematicians in Nordic countries do not have access to funding for OA, and are unlikely to want to pay.
- ▶ Hybrid is not currently an option, as they do not have the resources to manage it.
- ▶ S2O would probably be the favoured model for any shift to OA and would be accepted by most mathematicians. However, there are concerns about its long-term sustainability.

Members of the owner societies are entitled to a discount on subscriptions, but take-up is extremely low, so OA would not be a threat to the societies' membership numbers.

Technical considerations

The new partnership with MSP has been driven by factors other than OA. In particular, the journal was unable to satisfy accessibility requirements, which are increasingly mandated by governments. The change will mean that a lot of the day-to-day production work will move to the publisher, allowing the Coordinating Editor to focus more on the editorial side, and the journal will benefit from other things that the publisher is able to do for them such as enabling online-first, continuous publication, and so on.

The journal will continue to operate under a subscription model for the time being with the new publisher. However, MSP would be interested in moving it to an S2O model, which is the model they currently favour, and this may be an option further down the line. The impetus here is coming from the publisher, not the journal.



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