



**Funded by
the European Union**

This project has received funding from the European Union's Horizon Europe research and innovation programme under grant agreement No.101131556



REPORT

INSPIRING ERA EXCHANGE in-person event on Open Access

Overcoming Barriers in Open Access Publishing: Towards a More Inclusive
and Sustainable ERA

October 28, 2025



Introduction

The INSPIRING ERA Exchange on Open Access publishing, organised under the INSPIRING ERA project and its Policy Agenda, brought together a diverse group of stakeholders to examine how to overcome structural barriers to Open Access (OA) and to support a more inclusive and sustainable European Research Area (ERA). The full-day workshop in Warsaw focused on the current landscape of OA policies, funding models, infrastructures and practices, with a particular emphasis on the needs of small and community-driven publishers and Social Sciences and Humanities (SSH) communities. Building on earlier INSPIRING ERA Exchanges, the event aimed to connect policy debates with operational realities, bridge national and European perspectives, and generate concrete input for future ERA policy discussions on Open Science and research assessment reform.

Objectives of the event

The event pursued the following objectives, aligned with the INSPIRING ERA Policy Agenda on Open Science and Open Access:

- Present diverse perspectives on OA systems and publishing models across the ERA, including community-driven and Diamond OA approaches, and their implications for inclusiveness and sustainability.
- Facilitate structured cross-sector dialogue between policymakers, funders, research organisations, infrastructure providers, publishers and SSH researchers on key barriers to OA implementation.
- Identify practical actions to address funding inequities, infrastructure and metadata gaps, discoverability and multilingualism challenges, as well as issues of policy implementation and compliance.
- Discuss how OA policies interact with research assessment reform and responsible metrics, and how to better align assessment systems with Open Science principles.
- Co-create a set of targeted recommendations for improving OA policies, funding schemes and infrastructures at EU and national level, to be fed into ERA Forum reflections and the broader Open Science policy debate.

Attendees

The workshop gathered around 40 participants, in line with the INSPIRING ERA Exchange format, representing a broad community of practice from Poland and other 6 European countries. Attendees included research managers and open science officers, librarians and repository managers, representatives of research funding organisations, policymakers and European Commission officials, infrastructure providers, and scholarly publishers working with Diamond and non-commercial OA models. The group also featured SSH researchers (including early-career researchers), national academies and research institutes, as well as representatives of widening countries and European-level organisations such as OAPEN/DOAB, bringing a strong mix of operational experience and policy perspectives.

Methodology

The event followed the standard INSPIRING ERA Exchange format, combining plenary presentations, interactive tools and facilitated group work to generate actionable outputs. The programme opened with an introduction to the INSPIRING ERA project and the rationale for focusing on OA publishing, followed by keynote presentations on the ERA Policy Agenda 2025-2027, the EU-level OA and Open Science landscape, national and institutional initiatives, and the role of OA in research assessment. A short interactive segment (e.g. MS Forms poll) was used to surface participants' expectations and map their OA challenges, which then fed into breakout discussions.

Participants were divided into three thematic breakout groups: (1) infrastructure providers and policymakers, (2) librarians, repository managers and scholarly publishers, and (3)

researchers and research managers. Each group worked with a facilitator, following guiding questions that addressed predefined challenges identified in the registration survey ahead of the event: (1) funding inequities and the sustainability of OA (with a focus on Diamond OA and the broader financial unsustainability of APC-driven models), (2) fragmented infrastructure and metadata gaps, including technical capacity disparities across Member States and underdeveloped or poorly coordinated repositories and indexing services, (3) discoverability, multilingualism and community-driven publishing, with a particular concern for the limited visibility of smaller or multilingual journals, (4) policy implementation and compliance, including inconsistencies between funder and publisher requirements and limited awareness of self-archiving and licensing options among researchers, (5) misalignments between OA and research assessment systems, alongside the dominance of large commercial publishers, weak incentives for open practices, and the need for shared standards on quality assurance, metadata and indexing, (6) the lack of stable, multi-annual funding mechanisms for OA and Diamond infrastructures, (7) the tension between openness and legal or ethical obligations (copyright, IP, cultural sensitivities), and (8) emerging risks related to unethical or non-transparent uses of AI in open access publishing. The groups used these challenges, together with inputs from expert speakers, to frame their discussions. The workshop concluded with a plenary wrap-up, during which facilitator reported key challenges and proposals from each group, leading to a consolidated set of conclusions and preliminary recommendations for further work within INSPIRING ERA and in dialogue with the ERA Forum.

Content:

The INSPIRING ERA Exchange event “Overcoming Barriers in Open Access Publishing: Towards a More Inclusive and Sustainable ERA” convened policymakers, research managers, publishers, librarians, infrastructure providers, and researchers to examine structural obstacles to Open Access (OA) and to explore how Diamond and community-driven models can better support a diverse European Research Area. The aim was to connect national and European perspectives on OA, identify practical and policy barriers faced by different stakeholders, and co-develop recommendations for more inclusive, sustainable Open Access systems within the broader ERA open science agenda.

Opening remarks: In the introductory statements, Michał Goszczyński (Ministry of Science and Higher Education) and Tomasz Poprawka (Polish Science Contact Agency, PolSCA Brussels) underlined a shared commitment to strengthening Open Access as part of a wider national open science and open data effort, emphasising the need to safeguard publicly funded research while improving its availability and reuse. Goszczyński highlighted the importance of receiving concrete suggestions on how national policy can better support OA implementation and address security-related concerns around sharing research outputs, while Poprawka stressed that the INSPIRING ERA Exchange aims to confront practical obstacles in Open Access publishing and to advance Diamond and community-driven models that do not exclude less-resourced institutions or disciplines. The main objective of the workshop is generate evidence-based suggestions on how to align Open Access practices with ERA ambitions, ensuring that inclusive and sustainable OA becomes a realistic option for researchers and organisations across Europe.

Panagiota Kondyli’s presentation provided an overview of how current and upcoming European Research Area (ERA) policies aim to remove legal and regulatory barriers to accessing and reusing publicly funded research results, with a strong focus on supporting Open Access and open science. She situated this work within the ERA Policy Agenda 2022-2024 and 2025-2027, highlighting ERA Action 2 on developing an EU copyright and data framework fit for research and the new ERA Action 1 on enabling open science, including

further development of the European Open Science Cloud (EOSC) and better legal conditions for using publications and data.

Drawing on a major study published in 2024 and related expert work, Kondyli summarised key challenges: extensive transfer of rights from researchers and institutions to publishers, high costs and permissions barriers for publishing in Open Access, non-mandatory and fragmented research exceptions in copyright law, and widespread uncertainty over who controls access to research data and how it may be shared. She presented the study's analytical framework for possible policy responses, notably a harmonised EU-wide secondary publication right and strengthened research exceptions, and explained that an ongoing economic study will assess their social and economic impacts and feed into the impact assessment for the planned ERA Act.

In closing, Kondyli underlined that these initiatives are intended to underpin the “fifth freedom” of free movement of research, knowledge and technology in Europe, and invited stakeholders to contribute via consultations on the ERA Act so that future legal measures effectively support Open Access and Open Science in practice.

Maciej Maryl's presentation “National Perspectives, European Solutions: OPERAS-PL's Contribution to Inclusive Open Publishing” outlined how the OPERAS and OPERAS-PL research infrastructures support Diamond Open Access and inclusive publishing models in Poland and across Europe. He described OPERAS as a pan-European infrastructure for open scholarly communication, gathering over 60 institutions from more than 20 countries, and highlighted OPERAS-PL as its Polish node, bringing together nine universities, research institutes and e-infrastructures to work on scholarly communication, open science research, innovation and excellence in EOSC.

Maryl showcased key OPERAS-PL activities, including research on business models for open access journals and monographs, advocacy for open publishing, and community-building through workshops, webinars, podcasts and reports on OA monograph publishing, as well as the Open Humanities Manifesto, which calls for evaluation systems that recognise open science practices and diverse humanities outputs. He also presented the SCIROs initiative and an “ecosystem” model that links dispersed national and regional infrastructures with national clusters, ESFRI infrastructures, European clusters and EOSC, arguing that strong national nodes like OPERAS-PL are essential to make European-level open science infrastructures meaningful for SSH communities and smaller institutions.

Niels Stern's presentation on the current state of Open Access book publishing in Europe introduced the roles of the OAPEN Foundation and the Directory of Open Access Books (DOAB) as central infrastructures for hosting, distributing and curating peer-reviewed OA monographs. He highlighted the scale and diversity of these collections—over 40,000 OA books in OAPEN from more than 450 publishers in 70 languages, and around 100,000 titles indexed in DOAB from over 800 publishers—emphasising bibliodiversity and global reach as core strengths.

The talk structured opportunities and challenges from the perspective of key stakeholder groups. For publishers, OAPEN offers a trusted environment that increases discoverability and impact, but persistent issues include funding, compliance, reporting and cultural resistance to OA models. For libraries, he underlined the value of seamless integration of curated OA book collections into catalogues, while noting pressures from budget cuts, a complex and fragmented OA landscape, and the difficulty of maintaining an overview. For funders, OAPEN manages OA book collections (such as UKRI and EU collections) to support policy implementation and monitoring, yet funders still face constraints in funding, staffing, quality assurance, impact monitoring and policy alignment.

Stern also discussed tools and initiatives aimed at researchers, including the OA Books Toolkit, which provides practical guidance on OA book publishing, and he pointed to broader community engagement through OPERAS and the OA Books Network. He concluded by

flagging “big challenges,” notably the threat of malicious AI scraping to open digital libraries and the need to protect trust in scholarly book publishing through quality assurance and trusted platform networks.

Gerinta Raguckaitė’s presentation “Open Access in Practice: From Community Engagement to Data-Driven Foresight” illustrated how Lithuania is moving from formal OA mandates towards a more systemic, people-centred implementation of Open Science. She first outlined the legal and policy foundation, rooted in Article 51 of the Law on Higher Education and Research and the 2024 procedure on Open Access to research and experimental development results, noting that around 53% of Lithuanian publications indexed in Clarivate are already openly available, with an ambition to reach higher levels.

Raguckaitė then presented Lithuania’s EOSC Feasibility Study as a key infrastructure initiative designed to map the national research data landscape, quantify data volumes and storage costs, and assess repository interoperability in order to prepare a roughly €10 million investment roadmap focused on metadata frameworks, repository connections and data steward training. She emphasised that this work builds on a strong national digital foundation, where public-sector data already use FAIR-ready metadata standards (DCAT-AP-LT), but research data require distinct governance due to IP, ethics and scientific norms. A national EOSC forum and consultations with researchers and institutions were used to surface concerns (including reluctance to open data) and to ensure that investments respond to real needs rather than abstract plans.

The second pillar of her talk focused on the OPUS project, where the Research Council of Lithuania leads a national cohort within a European consortium to reform research assessment and incentivise Open Science practices. She described how 21 Lithuanian “open science ambassadors” completed a nine-month training programme covering Open Access, open data and FAIR principles, DMPs, citizen science and policy aspects, and subsequently trained over 200 researchers in their home institutions—far exceeding initial targets. This ambassador network, nominated for an Open Education Global Award, was presented as evidence that small countries can use their scale and close-knit communities to pilot change quickly, test what works and then embed it in national systems.

Agnieszka Cybulska-Phelan’s presentation “The Role of OA in Evaluation – Towards Open Infrastructures for Responsible Research Assessment” highlighted the paradox that Europe invests heavily in open research infrastructures while relying on closed, proprietary systems for research assessment. She identified key problems with current assessment practices: vendor lock-in, opaque processes, restricted access due to high costs, siloed data lacking interoperability, and over-reliance on traditional metrics that undervalue diverse research outputs and open science practices.

Drawing on the Coalition for Advancing Research Assessment (CoARA) vision—now joined by 765 organisations—Cybulska-Phelan explained the role of the Open Infrastructures for Responsible Research Assessment (OI4RRA) Working Group, co-chaired by OpenAIRE and CWTS with 80 members from 43 organisations. The group’s work focuses on enabling institutions to shift from proprietary to interoperable open alternatives that support diverse outputs, transparency and accountability, with key deliverables including core principles for OI fit for RRA, action plans for research performing organisations (RPOs) and research funding organisations (RFOs), and a recent report on barriers and enablers based on interviews with 17 experts across 11 countries.

She outlined specific RPO actions such as integrating systems with open infrastructures, improving metadata quality, broadening output collection and embedding open practices in policies, and RFO actions like promoting open funding data, responsible use of indicators and embedding OI requirements in policies. The presentation concluded that the community

is ready for implementation, with a need to track good examples and address challenges in transitioning to open infrastructures for sustainable research assessment reform.

Key Takeaways and Conclusions from the plenary session:

- Open Access is recognised as a strategic priority at both national and European level, with strong political commitment to safeguard publicly funded research while maximising its availability, reuse and contribution to a more inclusive and sustainable ERA.
- Legal and regulatory reforms (ERA Actions 1 and 2, prospective ERA Act, EU-wide secondary publication right and stronger research exceptions) are seen as essential to remove structural barriers around copyright, data access and licensing that currently hinder Open Access publishing and data sharing.
- Community-driven infrastructures and networks such as OPERAS/OPERAS-PL, OAPEN, DOAB and national EOSC initiatives demonstrate that Diamond and non-APC models can scale, support bibliodiversity and serve less-resourced institutions and SSH communities when backed by stable investment and coordinated governance.
- Countries like Lithuania show that small systems can leverage their agility to pilot open science policies, EOSC-ready data infrastructures and ambassador schemes that turn formal OA mandates into practice through training, dialogue and people-centred capacity building.
- There is a broad consensus that reforming research assessment and its underlying information systems is a precondition for sustainable Open Access: responsible, CoARA-aligned evaluation must recognise diverse outputs and open practices and be supported by interoperable, open infrastructures rather than closed, metric-driven platforms.
- Emerging risks such as malicious AI scraping and disinformation increase the urgency of trusted, high-quality open infrastructures and robust governance models to protect open digital libraries, maintain trust in scholarly communication and ensure that openness does not undermine research integrity.
- Open Access progress now depends less on launching new projects and more on aligning policies, incentives, infrastructures and assessment systems so that openness is rewarded, supported and embedded in everyday research practice.
- Multi-level cooperation—between EU institutions, national funders, infrastructures, universities, libraries and researcher communities—is needed to turn legal and policy initiatives (ERA agenda, CoARA, national OA regulations) into concrete, interoperable solutions that work across disciplines, languages and country sizes.

Summary of breakout group discussions:

Group 1:

Challenges and barriers

- Fragmented and incomplete metadata standards across institutions and platforms (MARC, ONIX, Dublin Core, local standards), making it difficult to identify, aggregate and monitor Open Access monographs and journals at national level.
- Lack of a central registry for OA books in Poland and limited systematic use of industry standards such as ONIX, especially among smaller publishers.
- Weak or absent national OA policy for publications (focus on open data instead), leaving institutions and university presses to develop their own ad hoc rules and practices.
- Financial constraints and sustainability issues for Diamond OA, particularly for books, leading to embargoes, hybrid models and a reliance on small print runs for cost recovery and prestige.



- Overabundance of institutional journals, high operational costs and uneven quality, creating pressure to rationalise portfolios and strengthen governance.
- Unclear responsibilities and insufficient coordination between ministries (science, culture, agriculture, etc.) and institutions regarding OA monitoring and support.
- Growing legal and ethical uncertainty around AI training on OA content (especially works under non-commercial licenses) and around AI-generated content submitted to journals.
- Cybersecurity and technical robustness of institutional platforms and repositories emerging as additional concerns for OA infrastructures.

Key takeaways from the discussion

- Institutional repositories (often based on DSpace with Dublin Core) and ministry-level reporting systems hold valuable data, but they are not yet fully exploited for a comprehensive picture of OA publishing in Poland.
- University presses are important cultural and branding assets for universities and play a central role in sustaining Diamond OA journals and books, even when the direct financial returns are modest.
- There is considerable interest among Polish libraries and presses in engaging with European initiatives such as the European Diamond Capacity Hub and trusted platform networks for books (e.g. OAPEN/DOAB models).
- Experiments with differentiated OA business models (e.g. immediate free HTML with paid PDF, time-limited embargoes, selective OA for specific series) are seen as promising ways to reconcile openness with sustainability.
- AI is simultaneously viewed as a useful tool and a major challenge, with current detection tools imperfect and practices across institutions heterogeneous and not transparently shared.

Conclusions

- Metadata fragmentation and the absence of shared national standards constitute a structural barrier to discoverability, monitoring and strategic planning for OA books and journals.
- The current OA ecosystem in Poland is driven largely by institutional initiatives (universities, libraries, presses) rather than by a coherent national publication-focused OA policy framework.
- University presses and institutional platforms are key levers for advancing Diamond OA, but they need clearer mandates, coordinated support and better alignment with European infrastructures and standards.
- Without clearer rules on AI use (both for training and for content creation), OA publishers and editors face increasing legal, ethical and quality-assurance risks.

Recommendations

- Develop a coordinated national approach to OA metadata and monitoring.
- Defining and promoting a minimal set of shared metadata standards across repositories and presses (e.g. harmonised use of MARC, ONIX, Dublin Core plus accessibility fields).
- Exploring a central registry or aggregation mechanism for OA monographs and journals, building on National Library, ministry and institutional data flows.
- Establish or strengthen national-level OA structures (e.g. an OA publications task force or a university presses network) to discuss standards, quality criteria, rationalisation of journal portfolios and engagement with European initiatives like the European Diamond Capacity Hub.
- Encourage phased experimentation with OA business models in university presses (e.g. pilot fully OA series, shorter embargo periods, mixed HTML/PDF models), supported by targeted institutional or project-based funding.

- Support internal audits of institutional journal portfolios to manage numbers, secure sustainable funding and focus resources on journals that meet agreed quality and OA standards.
- Develop clear institutional and, where possible, national guidelines on AI in scholarly communication, covering:
 - Conditions for AI training on OA content and respect for licence terms, especially non-commercial clauses.
 - Expectations for authors' use of AI tools, including transparency and responsibility for content and references.
 - Appropriate, proportionate use of AI-detection and plagiarism tools in editorial workflows.
- Integrate cybersecurity and accessibility requirements into OA infrastructure planning, ensuring that institutional platforms are both secure and capable of handling accessible formats and related metadata.

Group 2:

Challenges and barriers

- Insufficient and poorly aligned funding for Open Access: APCs of several thousand euro per article far exceed typical project OA allocations (e.g. 2-10% of budgets), leading to unused funds or inability to comply.
- Incompatibility between funder requirements and publisher conditions, especially for Horizon Europe, where rights retention and CC BY licensing conflict with embargoes and more restrictive licences required by many journals for green OA.
- Restrictions by national funders (e.g. NCN) against paying APCs in hybrid journals and limited national OA publishing programmes, which are quickly exhausted or subject to caps and changing rules.
- Complex, time-consuming administrative procedures in universities for processing APC payments (short payment deadlines vs institutional procurement rules), diverting researchers from research to bureaucracy.
- Pressure to publish in high-prestige, high-impact journals that are often subscription-based or hybrid, creating tension between career/reward systems and OA obligations.
- Embargo periods that prevent timely reporting of OA publications to funders, undermining KPIs and giving the impression of underperformance despite substantial output.
- Limited recognition and visibility of OA outputs (e.g. in OpenAIRE or similar platforms) in formal research assessment systems, especially in humanities and SSH.
- Lack of clear institutional guidance and practical support on rights retention, green OA options, repository use and licence negotiations with publishers.

Key takeaways from the discussion

- Researchers and research managers often feel left alone to navigate conflicting rules from funders and publishers, with little backing from institutional leadership or coordinated national support.
- Green OA is currently the main workaround (especially in Horizon 2020 projects), but it will be much harder to use under Horizon Europe due to stricter CC BY requirements and publisher resistance.
- OA constraints can directly affect project reporting and evaluation: embargoed papers cannot be counted as compliant OA outputs, even when published, which threatens KPI achievement in large collaborative projects.
- Senior researchers in top institutions sometimes bypass APC barriers via invitations to special issues or institutional deals, while early-career researchers and institutes with weaker budgets face much higher obstacles.

- There is concern that some OA practices become “tick-box” exercises, leading to lower-quality publications in less visible journals simply to meet OA requirements, while key, high-impact outputs remain locked behind paywalls.
- In humanities, OA is valued for visibility and reuse, but legal constraints around contemporary works and rights-holders significantly complicate implementation of FAIR and reuse principles.

Conclusions

- The current OA policy mix in Horizon Europe and national funding schemes creates structural misalignments: obligations are clear, but practical, legally sound routes to compliance (especially for high-quality journals) are often missing.
- APC-based Gold OA in commercial journals is widely perceived as economically unsustainable and inefficient, diverting substantial public funds away from research towards publishing services.
- Without changes at funder and policy-maker level, individual institutions and project teams have limited leverage to renegotiate terms with major publishers or to harmonise licence and embargo conditions.
- Research assessment systems that continue to prioritise impact-factor-driven prestige journals undermine incentives for researchers to prioritise OA, especially when OA venues are perceived as lower prestige or less visible.

Recommendations

At EU level:

- Re-open dialogue between the European Commission, major publishers and funders to reconcile Horizon Europe OA requirements (CC BY, zero embargo) with realistic publishing practices, including stronger, enforceable rights-retention frameworks.
- Ensure the next Framework Programme’s legal basis on OA is developed with meaningful input from research-performing organisations, addressing the funding–requirements mismatch identified by project teams.

At national level (ministries, funding agencies):

- Negotiate national or consortial transformative/“read-and-publish” agreements that reduce individual APC burdens and provide predictable OA options for researchers.
- Expand and stabilise national OA funding instruments (e.g. central OA publishing programmes), with transparent criteria and sufficient budgets, and align them with EU-level OA conditions.
- Create or strengthen national OA/Open Science committees or task forces involving funders, ministries, universities and institutes to jointly address policy conflicts and to issue clear guidance.

At institutional level:

- Develop clear internal policies and support structures on OA and rights retention, including legal/technical guidance for researchers, template addenda for publishing agreements and proactive repository support.
- Set up dedicated OA publication funds at university or faculty level with transparent prioritisation (e.g. early-career researchers, high-impact outputs, fully OA or community-driven venues) and realistic timelines for APC processing.
- Improve coordination between research offices, finance departments and libraries to streamline APC workflows and avoid timing conflicts with publisher payment deadlines.
- Enhance recognition of high-quality OA outputs in internal evaluation and promotion criteria, ensuring that publishing Open Access does not disadvantage researchers in career progression, including in humanities.

For the research community:

- Advocate collectively (through associations, alliances and initiatives such as CoARA or disciplinary societies) for assessment reforms that value openness, quality of peer review and societal impact alongside traditional metrics.
- Share good practices and practical solutions (e.g. effective use of green OA, institutional deals, alternative venues) across institutions and countries, so that individual teams are not forced to “reinvent the wheel” in isolation.

Group 3:

Challenges and barriers

- Research assessment systems remain heavily driven by journal rankings, impact factors and national points systems, which often undervalue Open Access books, non-traditional outputs and open practices.
- Fragmented and sometimes contradictory policies between EU-level mandates, national frameworks and institutional rules create uncertainty for researchers and research managers about how to comply with Open Access and open science requirements.
- Misalignment between OA obligations (e.g. rights retention, zero embargo, specific licences) and existing reward systems means that career incentives still push researchers towards high-prestige, often closed or hybrid venues.
- Limited administrative capacity in ministries, funding agencies and institutions (often “one or two people” handling national open science policy) hampers coherent implementation and sustained support for reform.
- Lack of robust, shared infrastructures and standards for research assessment data reinforces dependence on proprietary metrics and closed systems, despite large investments in open infrastructures for research itself.

Key takeaways from the discussion

- Breakout summaries stressed that reforming research assessment is a precondition for credible support of open science and Open Access; without this, policies risk remaining purely declarative.
- Participants highlighted the paradox that Europe finances open infrastructures and EOOSC, but still bases evaluation on closed, vendor-controlled tools and metrics.
- There was strong support for the CoARA vision of broadening what “counts” in assessment (diverse outputs, open practices, societal impact) and for embedding this into interoperable, open infrastructures.
- Examples from countries such as Lithuania illustrated how small systems can move faster, using ambassador networks and forums to connect policy, infrastructure and practice and to co-design realistic action plans.
- Discussions underlined the need to treat people and communities (e.g. ambassadors, practitioner networks) as core “infrastructure” for implementing change, not only platforms and technical tools.

Conclusions

- Policy fragmentation and misalignment between funders, institutions and national frameworks are persistent structural obstacles that slow down the uptake of open science and OA-friendly assessment models.
- Voluntary measures and soft-law instruments (pacts, agendas, declarations) have enabled experimentation but are insufficient on their own to overcome entrenched reliance on impact-factor-based evaluation.
- There is growing consensus that the upcoming European Research Area Act should address these gaps by providing a clearer legal and infrastructural framework for the “fifth freedom” of research, knowledge and technology, including assessment-relevant aspects.

Recommendations

At EU level:

- Use the ERA Policy Agenda and upcoming ERA Act to promote open, interoperable infrastructures for responsible research assessment that reduce dependence on proprietary metrics and systems.
- Support coordinated implementation of CoARA-aligned principles across Member States, including guidance on recognising diverse outputs, open practices, and community-driven infrastructures in assessment.

At national level:

- Align research assessment rules with open science and OA policies, ensuring that publishing in OA venues, sharing data and using open infrastructures are positively recognised in national evaluation systems.
- Create multi-stakeholder forums (ministries, funders, institutions, infrastructures, researchers) to co-design assessment reforms and to avoid contradictory requirements between funding schemes and evaluation frameworks.

At institutional and community level:

- Pilot and scale responsible assessment models that de-emphasise impact factors, incorporate qualitative peer review and explicitly reward open practices, feeding lessons back into national and ERA processes.
- Invest in capacity-building structures such as ambassador networks, open science champions and cross-departmental task forces that connect policy intent with day-to-day assessment and career practices.

IEE Conclusions and recommendations:

- Strengthen coordinated, long-term funding and governance for non-commercial and Diamond OA infrastructures (including university presses and institutional platforms), with particular attention to SSH and smaller publishers, so that inclusive OA models become structurally sustainable rather than project-dependent. **Fragmented, short-term funding keeps inequalities.**
- **Develop shared national and European standards and registries for OA metadata** (for journals and books), improving discoverability, monitoring and policy planning, while linking national systems more systematically to trusted European infrastructures such as OAPEN, DOAB, OPERAS and EOSC.
- **Infrastructure interoperability and common standards** must be prioritized to ensure that all European research, especially multilingual and SSH outputs, is discoverable and preserved for long-term access.
- **Align OA policies** with research assessment reform by embedding CoARA-compatible principles in institutional and funder practices, recognising diverse research outputs and open science activities, and progressively moving away from reliance on closed, proprietary evaluation systems and narrow metrics.
- **Clarify and harmonise legal and ethical frameworks around copyright, secondary publication rights, research exceptions, data access and AI use**, ensuring that Open Access strengthens rather than undermines research integrity, security and the “fifth freedom” of movement of knowledge in the ERA.
- **Invest in people-centred capacity building**, such as open science ambassadors, data stewards and editorial support, for researchers, libraries and publishers, ensuring that communities have the skills, guidance and incentives needed to implement OA policies in practice.
- Establish and support national and **cross-country peer-learning networks** to enable ongoing exchange of good practices, mutual support and joint experimentation on OA implementation, including Diamond OA funding models and governance arrangements.



- **Commercial publisher dominance requires coordinated counter-strategies.** Scaling up Diamond OA, supporting university-led publishing, and advocating for transparent licensing practices can shift market dynamics.
- **Open Access is not optional but should be foundational** to the ERA Policy Agenda 2025-2027 and ERA Act - essential to achieving research integrity, quality, and societal impact.

The Warsaw INSPIRING ERA Exchange demonstrated that overcoming barriers to Open Access requires simultaneous progress on funding models, infrastructures, legal frameworks and research assessment, with particular care for the needs of SSH communities, smaller institutions and multilingual publishing ecosystems. Through a mix of expert presentations and breakout group work, participants converged on the importance of stabilising Diamond OA funding, reducing infrastructure fragmentation, improving metadata quality and addressing AI-related risks, while also calling for evaluation systems that genuinely reward openness and diverse outputs. The conclusions and recommendations from the workshop will feed into INSPIRING ERA follow-up activities, including a Brussels event on Diamond OA and inputs to the ERA Forum and the forthcoming ERA Act impact assessment, ensuring that national experiences inform EU-level policy debates. At national level, organisers and partners committed to using the workshop's findings to advance dialogue with ministries, funders and institutions in Poland and other widening countries, with a view to piloting concrete improvements in OA funding schemes, metadata coordination and support services.