

Based on insights from the INSPIRING ERA Exchange on open access publications: overcoming barriers in open access publishing towards a more inclusive and sustainable ERA

Unlocking Open Access in Europe:

What's holding it back—and how to fix it



5 Things You Need to Know About Open Access in the ERA

Strong Policies Drive Success

Clear, well-funded Open Access policies work. Fragmented rules? They create confusion and slow progress.

Game-Changing Legal Moves

Two big wins: EU-wide secondary publication rights + stronger research exceptions = better access to publicly funded research.

Publishing is Evolving

Traditional models still rule, but community-led Open Access is a game-changer, game changer in the humanities and social sciences.

Support Over Compliance

Open Science thrives when we focus on people, not just rules. Training, guidance, and investment make the difference.

Humans vs. Bots

99.9% of Open Access traffic is generated by humans, but AI-driven scraping is rising fast. Time to secure trust and sustainability.¹

¹ EU Landscape – challenges, Niels STERN

Want to learn more about Open Science in ERA?

Explore tools, policies, and practical guidance at www.inspiring-era.eu webpage



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



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Challenges and how to accelerate Open Access in the European Research Area, where would you start?

BARRIER 01

Policy Implementation, Coherence & Compliance

SOLUTIONS:

- **Strengthen and harmonise** national OA policies, including clear mandates for secondary publication.
- **Create** or reinforce OA/Open Science task forces that bring together ministries, funders, universities, libraries, publishers and infrastructures to tackle policy conflicts and issue practical guidance.
- **Provide** clear national and institutional guidance on copyright and licensing.

BARRIER 02

Limited Awareness, Support & Capacity on the Ground

SOLUTIONS:

- **Invest** in people-centred capacity building.
- **Develop** clear institutional support structures and workflows for rights retention.
- **Improve** coordination among research offices, finance, libraries and legal departments.
- **Build** cross-country peer-learning networks to share existing Open Access solutions and tools.
- **Provide** targeted support for SSH communities and small institutions, reflecting specific legal, linguistic and resource constraints.

BARRIER 03

Funding & Sustainability

SOLUTIONS:

- **Redirect** more public funding from subscriptions and Article Processing Charges towards non-profit Open Access infrastructures.
- **Create** multi-annual funding mechanisms treating Open Access publishing as research infrastructure, not as an add on.
- **Expand** national Open Access funding instruments and align them with the EU-level conditions.
- **Encourage experimentation with** differentiated business models (fully Open Access series, shorter embargoes, mixed formats). Use coordinated national and consortia strategies to reduce reliance on APC²-heavy commercial pathways.

BARRIER 04

Metadata, Infrastructure & Discoverability

SOLUTIONS:

- **Develop** shared national and European metadata standards and registries for Open Access journals and books, including persistent identifiers and accessibility-related fields.
- **Establish** national aggregation mechanisms linking institutional, library and ministry data flows to trusted European infrastructures (OAPEN, DOAB, OPERAS, EOSC).
- **Agree** on a minimum common metadata set that repositories and presses commit to implementing, to enabling reliable monitoring and policy planning.
- **Integrate** long-term preservation, digital accessibility and cybersecurity systematically into Open Access infrastructure planning and investment.

BARRIER 05

Research Assessment Systems & Incentives

SOLUTIONS:

- **Reform** research assessment to embed Open Science and align Open Access policies with CoARA-compatible principles.
- **Develop open**, interoperable infrastructures for responsible research assessment.
- **Explicitly** recognise Open Access books, multilingual publications, community-driven journals and open practices in evaluation and funding criteria.
- **Pilot** and scale responsible assessment models that deemphasise impact factors.
- **Ensure** that publishing Open Access never disadvantages researchers in institutional rankings.

BARRIER 06

New Risks Linked to AI & Integrity

SOLUTIONS:

- **Clarify** legal and ethical frameworks for AI in scholarly communication, including training on Open Access content.
- **Develop** institutional and, where appropriate, national guidelines on acceptable AI use.
- **Protect** Open Access infrastructures from malicious scraping and integrity threats.
- **Use** proportionate, transparent editorial approaches to AI detection and integrity checks.
- **Ensure** AI governance measures are designed to reinforce — not weaken — Open Access and the reuse of trusted, high-quality research.

² Article Processing Charges

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Key policy recommendations

European Commission (strategic level)

- **Strengthen** action under the ERA Policy Agenda and the ERA Act in support of open, interoperable infrastructures for publishing and research assessment.
- **Reopen** dialogue with publishers and funders on legally and operationally feasible routes to Open Access compliance.
- **Support** common European metadata standards, registries and stronger links with trusted infrastructures such as OAPEN, DOAB, OPERAS and EOSC.
- **Address** copyright, secondary publication rights, research exceptions and the use of AI in future legal frameworks that support the “fifth freedom” of knowledge circulation.
- **Invest** in capacity building and peer-learning networks across Member States and institutions.

Member States (national system level)

- **Move** from policy declarations to durable OA implementation mechanisms, including coordination, budget, expert support and monitoring tools.
- **Stabilise** national Open Access funding instruments and align them better with European programme conditions.
- **Create** or strengthen multi-stakeholder national forums bringing together ministries, agencies, universities, publishers, libraries and infrastructures.
- **Develop** shared metadata standards and aggregation mechanisms for OA publications, including books and journals.
- **Provide** practical guidance and support services so that OA obligations can be implemented consistently across institutions and disciplines.

RFOs (operational / funding level)

- **Align** Open Access policies with research assessment reform and reduce incentives that continue to favour closed prestige publishing.
- **Provide** researchers with practical guidance on licensing, repositories, self-archiving rights and compliance with grant conditions.
- **Design** funding instruments that support not only APCs but also public infrastructures, Diamond OA and community-driven solutions.
- **Use** funding mechanisms to reward openness in ways that are feasible for SSH communities, multilingual outputs and less-resourced institutions.

RPOs (institutional level)

- **Establish** clear internal Open Access policies and support for legal, technical and administrative issues.
- **Strengthen** libraries, repositories, university presses and support teams as core parts of the OA ecosystem.
- **Streamline** publication-funding workflows and link OA more closely to staff evaluation and institutional strategy.
- **Invest** in community capacity via open science ambassadors, training and practice-sharing networks.
- **Develop** institutional AI guidance for scholarly communication, covering transparency, editorial roles and infrastructure protection.

INSPIRING ERA FACTSHEET



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Tools and programmes:

OA Books Toolkit

provides practical guidance for authors and policymakers on OA monographs.

GUIDANCE

OAPEN & DOAB

are trusted platforms for hosting and indexing peer-reviewed OA books.

INFRASTRUCTURE

OPERAS & OPERAS Innovation Lab

European research infrastructures support Diamond OA and SSH-focused open publishing.

INFRASTRUCTURE

The CoARA Working Group

on Open Infrastructures for Responsible Research Assessment (OI4RRA) and related action plans for RPOs/RFOs

ASSESSMENT

European Open Science Cloud

is a system of repositories and services that provides the technical and governance foundations for cross-border discovery and reuse of research data.

INFRASTRUCTURE

EOSC EU Node

Node introduced a common entry point, governance framework and onboarding mechanism for national and thematic EOSC nodes, enabling repositories across Europe become interoperable and EOSC-ready

INFRASTRUCTURE

Open access and FAIR data

principles for research data were embedded in funding requirements, data management plans and ERA-level monitoring tools.

FRAMEWORK

Open Science ambassador programmes

(e.g. OPUS) that train researchers to drive cultural change inside institutions.

CAPACITY

GraspOS

is a Horizon Europe project building an open infrastructure for next-generation, OS-aligned research assessment, providing data and tools to support responsible evaluation.

ASSESSMENT

OpenAIRE

is a pan-European OS infrastructure that makes research outputs openly discoverable and reusable. It also helps researchers, institutions and funders implement EU OA and OS policies.

INFRASTRUCTURE

DIAMAS

is an EU project that supports institutional and Diamond Open Access publishing by improving quality, sustainability and coordination across Europe.

STANDARDS

Diamond Open Access Standard

DIAMAS developed the Diamond Open Access Standard (DOAS), a quality framework and self-assessment tool that helps DOA publishers align their governance, workflows and editorial practices with shared standards.

STANDARDS

DOAJ

is a global, community-driven index of quality open access journals, ensuring diverse, trusted research is freely available online to everyone.

INFRASTRUCTURE

The European Diamond Capacity Hub (EDCH)

is a collective that provides services for Diamond Open Access Publishers, Service Providers, and Tools & Technology Providers.

CAPACITY

GATE

strengthens OS capacities—people, infrastructures and practices—so research can be shared, reused and governed responsibly in a rapidly changing landscape shaped by AI, data ethics and security

CAPACITY

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