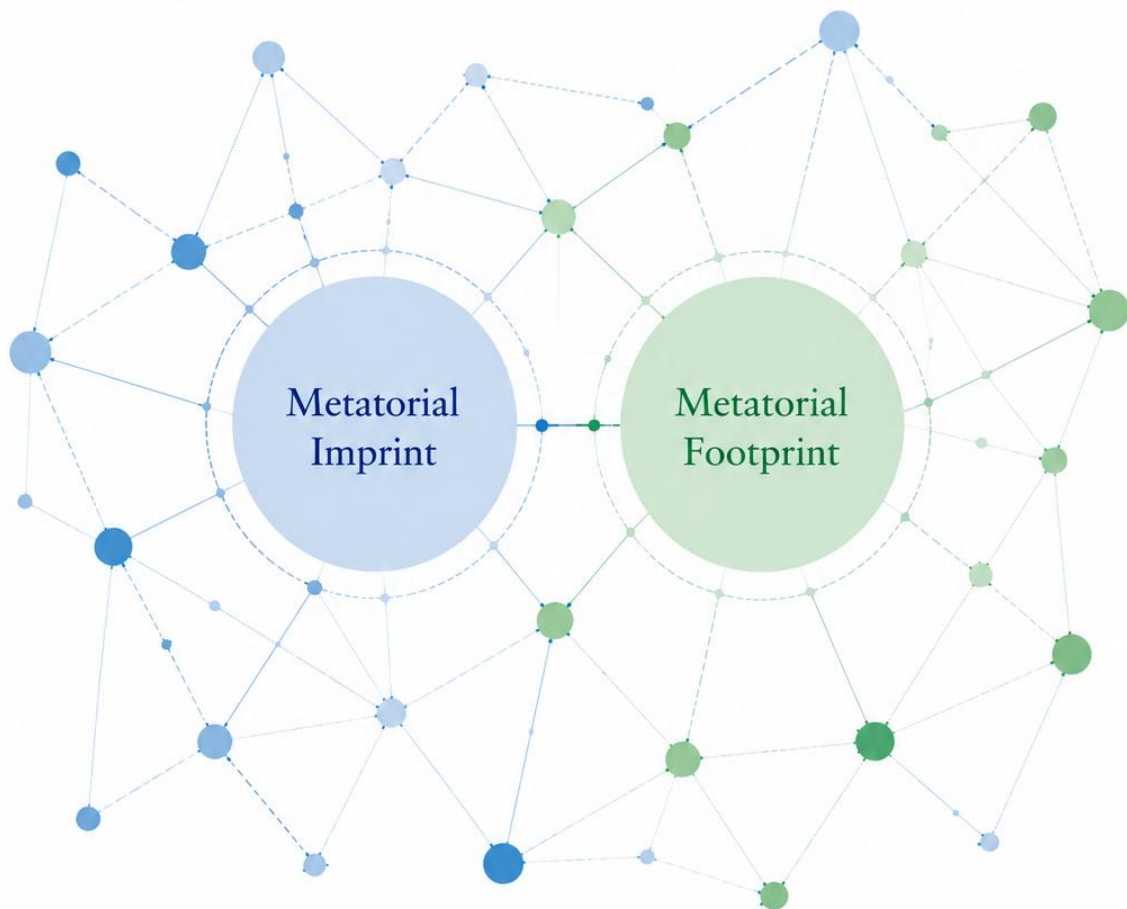


Metatorial

Articulating the Essential Practices
of Open Access Publishing in an
Age of AI Knowledge Systems

Mirela Roncevic, Ph.D.



Mirela Roncevic

Metatutorial: Articulating the Essential Practices of Open Access Publishing in an Age of AI Knowledge Systems

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Abstract

Open Access (OA) publishing has expanded access to scholarly research through a growing ecosystem of collective funding models, institutional partnerships, and community-supported publishing initiatives. At the same time, the increasing complexity of OA funding environments, combined with the growing influence of artificial intelligence (AI) and machine-mediated knowledge systems, has exposed a largely overlooked challenge: understanding not only what scholarly content becomes openly available, but also how that content is selected, funded, organized, discovered, preserved, and sustained over time.

This paper introduces *metatorial*, a framework developed by Mirela Roncevic to describe and examine a set of essential yet often fragmented or overlooked practices within contemporary OA publishing. Positioned between editorial practice and institutional stewardship, metatorial focuses on the evaluative, organizational, communicative, and continuity-related activities meant to shape both the funding of OA content and its long-term visibility across scholarly and knowledge environments.

The paper introduces the concepts of *metatorial imprint* and *metatorial footprint* to distinguish between pre-funding and post-publication responsibilities within the OA ecosystem. It further proposes metatorial as an inventory process through which institutions, libraries, publishers, funders, intermediaries, and scholarly communities can examine seven interconnected dimensions of OA publishing: content, participation, representation, funding, discovery, visibility, and continuity.

Rather than offering a checklist or compliance framework, metatorial provides a way of understanding how collective publishing decisions shape the scholarly environments they help create. At a time when openly available research increasingly informs both scholarship and AI systems, the paper argues that greater attention to these interconnected dimensions and activities can strengthen the coherence, relevance, discoverability, and long-term value of the research being collectively funded and supported.

Keywords

Metatorial; Metatorial Imprint; Metatorial Footprint; Open Access; Diamond Open Access; Open Science; Open Access publishing; Open Access funding; Open Access content; Open Access monographs; S20 journals; collaborative funding; collective funding; scholarly communication; scholarly publishing; scholarly infrastructure; academic libraries; discoverability; sustainability; artificial intelligence; AI knowledge systems

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Introduction

Open Access (OA) publishing has entered a period of significant structural transition. Over the past decade, collaborative funding models, particularly those associated with Diamond Open Access (DOA) and collective institutional support, have gained increasing visibility across academic publishing. Libraries, funders, publishers, and various intermediaries have invested substantial effort into developing approaches that make scholarly content openly available without transferring financial burdens onto authors—one of the defining characteristics of DOA.

The emergence of DOA can be understood partly as a response to limitations and inequities associated with commercially dominant Gold OA models, particularly those relying on Article Processing Charges (APCs) for journals and Book Processing Charges (BPCs) for monographs. While Gold OA succeeded in expanding public accessibility to research, it also introduced new forms of exclusion by shifting financial burdens onto authors expected to pay those fees. These tensions became especially visible within the humanities and social sciences, where monographs remain central to scholarly communication, funding is often limited, and research output does not align easily with fee-driven publishing structures.

Collaborative and collectively funded OA initiatives emerged in response to these pressures. Rather than relying on individual authors to finance publication, these models distribute responsibility across networks of participating institutions, libraries, publishers, and supporting organizations. In the context of academic books and monographs, this development became particularly visible through collective funding initiatives, library membership models, intermediary-led initiatives, and publisher-driven community support structures designed to sustain openly available monograph publishing at scale.

By combining financial support across participating institutions, collaborative DOA initiatives make it possible to ‘collectively’ fund collections of publications rather than individual titles. Importantly, the amount of content ultimately published OA usually depends directly on the amount of institutional participation and funding received. In other words, the more institutions contribute funding, the more scholarly content can be published OA. Similar dynamics later expanded into journal publishing through models such as Subscribe to Open (S2O), which adapted collective support principles to subscription journal environments. As long as sufficient institutional support is secured through subscriptions, the journals remain openly available.

At the same time, Artificial Intelligence (AI) systems and Large Language Models (LLMs) have been rapidly transforming how scholarship is accessed, synthesized, surfaced, and reused. Increasingly, research published OA has become some of the most accessible and machine-readable material available for AI-driven knowledge systems. This is because OA books, journals, and repositories, among other scholarly outputs, are often published under Creative Commons (CC) licenses. As such, they are not subject to many of the technical and

legal restrictions associated with licensed content and are therefore significantly easier to index, harvest, process, and integrate into AI systems.

As a result, OA content is no longer simply reaching researchers through library and other scholarly online platforms. It is being integrated into knowledge environments through which machine-driven systems learn, summarize, retrieve, and redistribute information and published research. This shift introduces new pressures and new questions regarding how OA content is selected, maintained, and circulated globally. While editorial and peer review structures within scholarly publishing remain well established, less attention has been given to how OA content becomes published OA in the first place. The journey from a book or journal being proposed for collective support to ultimately becoming openly available involves evaluation, funding, communication, reporting, and long-term follow-through. These processes now rapidly shape what enters the global knowledge ecosystem and what remains visible within it over time.

As collective funding models continue to expand across publishers, intermediary platforms, institutional consortia, library networks, and community-supported infrastructures, questions of content quality, relevance, coherence, transparency, accountability, and long-term stewardship become essential. As a result, a growing structural gap has emerged between responsibilities traditionally associated with publishers, including editorial direction, content development, dissemination, and delivery, and those associated with libraries, institutions, and funders, including evaluation, selection, prioritization, funding allocation, and ongoing financial commitment. Although many of these activities already exist in practice, they often remain fragmented, insufficiently connected, or compressed within increasingly accelerated funding and publishing environments that leave little space for broader system-level coordination and reflection.

This gap can no longer be ignored. If left insufficiently examined, coordinated, or addressed, it risks contributing to increasingly uneven research environments at precisely the moment when AI systems are beginning to amplify scholarly output at unprecedented scale. Fragmented and insufficiently coordinated OA environments are no longer affecting only publishers, libraries, or funding structures themselves. They are also shaping the quality, visibility, coherence, and reliability of the scholarly material that researchers, institutions, AI systems, and the broader public now rely upon to access, interpret, and build future knowledge.

This paper introduces the concept of *metatorial* as a framework for understanding and addressing this emerging and, to date, largely inadequate structural layer within the OA ecosystem. Building on the author's previous research on the sustainability of collaborative funding models for OA monographs (Roncevic, 2021b), institutional participation in collective funding environments (Roncevic, 2023), and librarians' motivations for supporting collaborative OA initiatives (Roncevic, 2021a), the paper examines why an additional layer of shared responsibility is now needed across the processes connecting publishers, intermediaries, libraries, institutions, and funders.

The term *metatorial* is proposed as a developing set of evolving practices intended to connect the two backbone operations that shape the OA ecosystem: editorial judgment within scholarly publishing and the evaluative, metadata-driven stewardship traditionally associated with academic libraries and institutions. The broader goal is not simply to improve coordination across collaborative OA environments, but to contribute toward more accountable and trustworthy systems of openly available knowledge at a pivotal moment in the evolution of human knowledge sharing.

While the term *metatorial* has appeared previously in unrelated contexts outside scholarly communication, the concept developed in this paper emerged independently and is used here specifically to describe a structural layer connecting editorial and communication practices and metadata organization within the collaborative OA ecosystem.

1.

Diamond Open Access in Context

To understand how collaborative DOA ecosystem evolved into increasingly complex and interconnected funding environment, it is first necessary to examine how monographs transitioned from traditional into OA publishing, what gave rise to collaborative and collective funding models associated with DOA, and why institutions chose to participate in them. The development of DOA did not emerge all at once, but evolved gradually through a combination of economic pressures, institutional experimentation, and growing international support for more equitable and sustainable approaches to scholarly communication.

1.1 The Transition of Monographs into OA

Since its inception, the development of OA publishing has unfolded unevenly across formats, academic disciplines, and regions. While scholarly journals became early focal points of the OA movement through Green and Gold OA models, the transition of monographs into OA unfolded more slowly and under significantly different economic and institutional conditions. In many ways, monographs became one of the key areas in which the limitations of author-facing publishing charges accelerated the development of collaborative and collectively funded OA approaches.

Part of the reason lies in the distinct economic and scholarly role of the monograph itself. Unlike journal articles, monographs involve significantly higher production costs, longer editorial and production timelines, and publishing traditions historically tied to print sales, royalties, and restricted distribution. Within many humanities and social science disciplines, the monograph remains deeply connected to scholarly reputation, tenure, and the communication of long-form scholarship. At the same time, these disciplines have historically operated with more limited research funding than many STEM fields, making expensive author-facing publication fees particularly difficult to sustain at scale (Crossick, 2015).

As interest in OA publishing expanded globally, publishers, libraries, and funding bodies began exploring alternative business models capable of supporting monographs without relying exclusively on traditional sales structures or author-facing charges (COPIM, 2023). While Gold OA models relying on APCs became increasingly institutionalized within journal publishing, the application of similar fee-driven approaches to monographs exposed significant practical and financial limitations. In many cases, BPCs proved prohibitively expensive for authors, institutions, and smaller publishers alike, particularly within the humanities and social sciences. As a result, monographs became one of the major pressure points pushing the broader OA ecosystem toward collaborative, institutionally supported, and collectively funded approaches.

Over time, a broad range of models emerged, including institutional subsidies, library membership programs, collaborative underwriting initiatives, intermediary-led collective funding structures, and library-supported crowdfunding approaches (Roncevic, 2021b). Rather than relying on individual authors to finance publication directly, these models distributed financial responsibility across participating institutions and library networks. In other words, the more institutions contributed support, the more content could be published OA.

These developments laid important groundwork for the later expansion of DOA and collectively funded publishing environments built around shared institutional participation rather than direct author payment. Although OA publishing had long existed within smaller scholar-led and non-commercial journal environments, collaborative monograph funding models played a major role in demonstrating how broader institutional coordination and collective financial participation could function within interconnected OA publishing systems (COPIM, 2023).

1.2 Collective OA Funding Models

Within scholarly publishing, DOA generally refers to publishing models in which neither readers nor authors face direct access or publication charges. In practice, sustaining such models often requires coordinated forms of institutional, library, consortial, governmental, or community support. As a result, collaborative and collectively funded approaches became some of the defining operational characteristics of many DOA environments.

As mentioned, collaborative monograph funding models redistribute financial responsibility away from individual authors and toward institutions, libraries, and coordinated funding communities. In practice, they often rely on libraries joining together across regions, countries, and continents to support the OA publishing of scholarly books for the benefit of the global research community. Unlike traditional publishing transactions, collaborative OA models frequently depend on sufficient institutional participation to become fully realized. In many cases, the amount of content ultimately published OA remains directly tied to the level of collective financial support secured.

The current collaborative OA ecosystem for books consists of several distinct but overlapping approaches (Table 1). Multi-publisher and intermediary-led initiatives include programs such as Knowledge Unlatched, JSTOR Path to Open, and Project MUSE OA initiatives. These models typically aggregate content across multiple publishers and rely on broad institutional participation, centralized coordination, and shared funding structures designed to distribute financial risk across participating libraries. Their primary strength lies in their ability to increase the visibility and accessibility of OA content across diverse publisher portfolios while creating larger-scale collective funding environments capable of supporting monograph publishing beyond institutional boundaries. At the same time, the expansion of intermediary-led models has also introduced additional layers of coordination, communication, reporting, and evaluative complexity into the OA ecosystem.

Publisher-led collective OA programs include initiatives such as MIT Press Direct to Open, Central European University Press' Opening the Future, Liverpool University Press OA initiatives, and various developing models introduced by publishers including Bloomsbury and De Gruyter. Unlike intermediary-led approaches, these programs are typically organized around individual publisher catalogs, disciplinary specialization, or mission-driven publishing strategies. In many cases, they allow publishers to maintain closer alignment between funding structures, editorial direction, subject focus, and long-term publishing goals while still relying on collective institutional support to sustain OA publication models.

Alongside the growth of collective funding initiatives, broader infrastructure and research efforts such as Open Book Futures also contributed significantly to the development of community-led, non-commercial, and experimental approaches to OA monograph publishing (Open Book Futures, 2026). At the same time, a number of smaller-scale library membership, scholar-led, and community-supported initiatives also emerged across the OA landscape. Community-oriented structures such as punctum books, Open Humanities Press, Open Book Collective, Open Journal Collective, and various scholar-led publishing cooperatives frequently combine institutional memberships, voluntary support structures, library partnerships, and community-based funding mechanisms to sustain OA publishing outside commercially dominant frameworks. These approaches often emphasize bibliodiversity, disciplinary communities, and non-commercial forms of scholarly communication.

Table 1

Types of Collaborative OA Funding Models

Collaborative OA Model	Typical Structure	Key Characteristics
Multi-publisher / intermediary-led initiatives	Aggregate content across multiple publishers through centralized coordination and shared institutional funding	Broad participation, distributed financial risk, cross-publisher coordination
Publisher-led programs	Organized around individual publisher catalogs or mission-driven publishing strategies	Strong disciplinary focus, strong editorial alignment, publisher-controlled outcomes
Community-supported and scholar-led initiatives	Sustained through memberships, voluntary support, and cooperative structures	Bibliodiversity, scholarly community governance, non-commercial orientation

1.3 Institutional Participation in OA Funding

Previous research into collaborative OA funding models revealed that libraries frequently supported these initiatives not primarily because of strong local usage metrics, but because they believed in the broader principles of OA and global scholarly communication (Roncevic, 2021a). Findings from the author's 2021 survey of 160 librarians across Europe

and the United Kingdom demonstrated that the strongest motivations for supporting collaborative OA initiatives were tied directly to the principles of OA. More than 80 percent of respondents identified support for OA principles as one of their primary reasons for participation, while approximately 75 percent emphasized the belief that scholars should not personally bear the financial burden of publishing their own research. By contrast, strong usage statistics ranked significantly lower as a motivating factor, with many respondents describing usage as relevant but not decisive in institutional funding decisions. Institutional participation therefore often reflected commitments to scholarly equity, international access to knowledge, and the long-term sustainability of openly available research, not simply measurable return on investment.

At the same time, the same research also revealed important tensions and limitations. Budget constraints emerged as the single strongest reason institutions did not participate more actively in collaborative OA initiatives, identified by well over half of respondents as a major barrier to continued support. Concerns regarding disciplinary relevance and uncertainty about whether available content aligned sufficiently with local institutional priorities also ranked highly among institutional reservations. At the same time, approximately two-thirds of respondents indicated that the disciplinary focus of available content remained an important factor in funding participation decisions, while many also emphasized the importance of ensuring that their own institutional authors and research communities were represented within collaborative OA environments. These findings suggested that institutional participation in collaborative OA ecosystems was shaped not simply by measurable demand, but by a more complex combination of scholarly values, strategic alignment, institutional identity, and financial negotiation.

Previous research also showed that institutions participating most consistently in collaborative OA funding environments were often highly research-intensive universities with strong international orientations and significant scholarly output (Roncovic, 2023). Sustainability appeared connected not simply to transactional benefit or measurable local usage, but to broader institutional cultures committed to research visibility, international collaboration, disciplinary investment, and participation in global scholarly infrastructures. At the same time, institutional participation was not driven exclusively by ideological commitments to openness. Libraries also frequently considered local relevance, disciplinary alignment, institutional visibility, and the representation of their own researchers in various collections when making funding decisions. In practice, support for collaborative OA initiatives often reflected an ongoing negotiation between ideology, institutional strategy, financial limitations, and the practical realities of collection development.

Importantly, no single funding model has emerged as dominant across the collaborative OA landscape. The current ecosystem remains highly diverse, experimental, and structurally fluid (Table 1). Existing models frequently overlap in both terminology and implementation, while initiatives continue adapting in response to institutional priorities, budget realities, disciplinary needs, regional infrastructures, and evolving publishing environments.

This flexibility enabled rapid experimentation and innovation across OA publishing. It also contributed to increasing structural complexity across the ecosystem itself. As collaborative OA models multiplied across publishers, intermediaries, and institutional networks, libraries increasingly found themselves navigating a growing volume of funding requests, overlapping initiatives, and structurally diverse participation models within a funding environment that remained inherently finite. Concerns also began emerging around uneven participation and long-term collective sustainability, particularly as some institutions reduced or withdrew support while others continued carrying substantial portions of the financial burden required to sustain funded collections or programs. Survey findings from 2021 further revealed that while many librarians believed collaborative OA models could remain sustainable long-term, a substantial portion expressed uncertainty rather than confidence, reflecting growing awareness that increasingly complex funding ecosystems would require more consistent coordination, evaluation, prioritization, and institutional accountability moving forward.

2.

The Expansion of Collaborative Open Access Initiatives

The expansion of collaborative OA initiatives and the related collective funding models has brought significant benefits to scholarly communication. Over the past decade, collectively funded approaches helped expand public access to research, supported the growth of DOA publishing, reduced financial barriers for authors, and enabled broader international participation in openly available scholarly communication. These developments were particularly important within the humanities and social sciences, where the high cost of monograph publishing, increasing pressure on library acquisition budgets, and the limitations of author-facing BPCs created growing demand for alternative funding structures capable of sustaining long-form scholarship more equitably and at greater scale.

Libraries and institutions now participate in a growing number of initiatives designed to support books, journals, repositories, infrastructures, and community-driven publishing programs through shared financial investment and coordinated institutional support. Collaborative OA models therefore offered not only alternative funding mechanisms, but also an alternative vision of scholarly communication itself, grounded in collective participation, shared responsibility, and broader access to knowledge.

At the same time, the rapid expansion of the collaborative OA ecosystem also exposed structural weaknesses that remained easier to overlook while these initiatives were still relatively small and experimental. As the number of initiatives, intermediaries, funding requests, and publishing models multiplied, institutions increasingly found themselves operating within environments shaped by fragmented information, uneven reporting structures, inconsistent evaluative standards, varying levels of transparency, and growing demands on institutional time, labor, and financial resources. In some cases, the ecosystem also became increasingly focused on demonstrating scale, participation metrics, growth, and platform expansion, while considerably less attention was devoted to concerns regarding the substance, coherence, visibility, and long-term scholarly value of the content being funded.

In practice, much of the collaborative OA ecosystem expanded faster than the structures needed to evaluate, coordinate, communicate, and sustain it coherently over time. Intermediaries especially invested substantial effort into increasing institutional participation, securing funding commitments, expanding publisher portfolios, and scaling initiatives internationally, while significantly less attention was devoted to accountability, follow-through, consistency across initiatives, metadata quality, post-funding transparency, and the cumulative effects of fragmentation across publishing environments that were becoming interrelated (Figure 3).

As the ecosystem matured, a number of practical but important questions also became more difficult to ignore by institutions deciding what to fund:

- ❖ What types of publishers were actually participating across collaborative funding environments?
- ❖ Did collective funding initiatives represent a sufficiently broad and diverse range of university presses, independent publishers, scholar-led initiatives, and fully OA-born publishing programs?
- ❖ Were proposed collections genuinely reflecting the disciplinary priorities and research interests of the institutions distributing the funding?
- ❖ What level of metadata quality and reporting consistency was necessary to evaluate whether initiatives were actually delivering on their stated goals post-funding and post-publication?
- ❖ How visible and discoverable did funded content ultimately become after publication?
- ❖ And to what extent were institutions evaluating the scholarly substance of the content they were funding versus the financial and technical structures used to present it?

Different types of collaborative initiatives also generated distinct forms of evaluative complexity. Multi-publisher and intermediary-led initiatives raised concerns about publisher diversity, collection coherence, metadata standardization, financial transparency, and long-term reporting practices. Publisher-led models introduced separate concerns regarding how content was selected for collective support, whether certain forms of scholarship were prioritized over others, and how institutions could evaluate the relationship between funding structures and editorial direction. Community-supported and membership-based initiatives introduced additional questions regarding governance, labor distribution, scalability, and long-term continuity across smaller and often decentralized publishing environments.

Despite these structural differences, all collaborative OA initiatives ultimately depended on a shared institutional expectation: that libraries should be able to evaluate the scholarly substance, quality, coherence, visibility, and long-term value of the content and publishing environments they were being asked to support.

As collaborative OA participation expanded across interconnected funding environments, these pressures and unresolved questions became progressively more visible and more difficult for libraries and institutions to navigate responsibly.

2.1 The Growing Complexity of OA Structures

One of the defining characteristics of the current OA landscape is the rapid multiplication and fragmentation of collective funding initiatives themselves. What initially began as a relatively limited number of experimental and community-oriented funding models gradually expanded into a highly diverse ecosystem consisting of intermediary-led

initiatives, publisher-led programs, library membership structures, collective subscription arrangements, scholar-led publishing cooperatives, and increasingly specialized funding environments operating across books, journals, hosting platforms, and other infrastructures.

The initiatives available to libraries and institutions now differ widely in governance structures, pricing models, funding expectations, disciplinary focus, reporting practices, delivery mechanisms, transparency standards, publisher participation, and long-term commitments. In many cases, even the terminology used across initiatives overlaps or remains inconsistently defined. Terms such as “collective funding,” “community support,” “membership models,” “Diamond OA,” “library partnership programs,” “Subscribe to Open” initiatives are frequently used across structurally different initiatives, making direct comparison increasingly difficult for institutions attempting to evaluate participation responsibly.

This complexity extends far beyond the question of funding alone. Before funding decisions are even made, libraries and institutions must assess what exactly is being proposed, how content is grouped and presented, whether disciplinary scope aligns with institutional priorities, what forms of accountability accompany funding requests, how transparency is communicated, what long-term commitments are implied, and how initiatives demonstrate scholarly value beyond promotional language alone.

At the same time, complexity also continues after funding is secured. Institutions frequently encounter uneven reporting practices, varying levels of post-funding transparency, inconsistent communication regarding publication outcomes, limited or severely delayed visibility into what content was ultimately funded and published, and differing approaches to metadata quality, discoverability, preservation, and long-term accessibility across initiatives.

Figure 1A

*Expanding Collaborative
OA Ecosystem*

A diverse and expanding landscape
of collaborative OA initiatives and
supporting structures



As the ecosystem expanded, these overlapping pressures gradually transformed collaborative OA participation from a relatively straightforward funding decision into a process of continuous institutional evaluation, prioritization, quality interpretation, and coordination (Figure 1A).

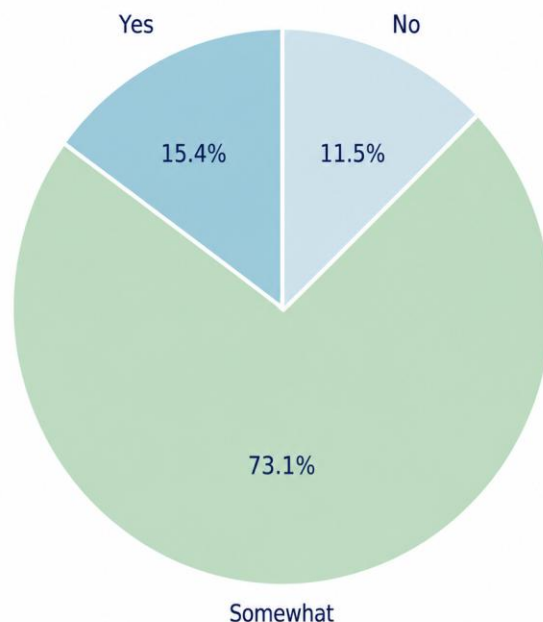
2.2 The Growing Role of Libraries in OA Systems

The author's most recent 2026 survey of librarians involved with OA funding across a wide range of European institutions suggests that many of the concerns identified in earlier research from 2021 have not disappeared but instead intensified as collaborative OA environments became larger, more fragmented, and more structurally demanding (Roncovic, 2026). The challenge facing institutions is no longer simply whether OA content should be financially supported. For many libraries, support for OA as a principle is already well established. Earlier research demonstrated that librarians frequently participated in collaborative OA initiatives because they believed scholarly knowledge should be openly accessible and because they strongly opposed models requiring authors to finance the publishing of their own research (Roncovic, 2021a). At the same time, however, the earlier survey also revealed several concerns that would later become increasingly important as the ecosystem expanded.

Figure 2

Librarian Survey Results

Librarians' answers to whether they have a clear understanding of the substance, quality, and delivery process of OA content supported through collective funding models



Most notably, librarians already expressed concern regarding financial sustainability, the growing number of OA funding models, and the difficulty of evaluating which initiatives deserved long-term institutional support. Budget limitations emerged as the single largest barrier to participation, identified by over 30% of participants at the time, while many respondents emphasized the need for stronger content quality as the second key challenge (nearly 20%). Other identified challenges included lack of disciplinary relevance and broader scholarly representation and diversity within collaborative OA environments. One of the

strongest emerging concerns identified in the earlier survey was that librarians already felt increasingly overwhelmed by the growing number of OA initiatives, funding structures, and business models entering the ecosystem at the time (Roncevic, 2021a). Although these concerns emerged several years ago, the complexity surrounding collaborative OA participation has since expanded considerably.

The 2026 survey suggests that librarians now operate within conditions shaped less by uncertainty about the idea of OA itself and more by partial visibility, evaluative overload, fragmented reporting structures, and growing expectations surrounding institutional participation. When survey respondents were asked whether they felt they had a clear understanding of the substance, quality, and overall delivery process of OA content supported through collective funding models, only a relatively small minority responded definitively in the affirmative, while the overwhelming majority selected “somewhat,” suggesting not outright distrust, but rather a persistent condition of incomplete transparency and structural ambiguity surrounding how collectively funded OA models function in practice (Figure 2).

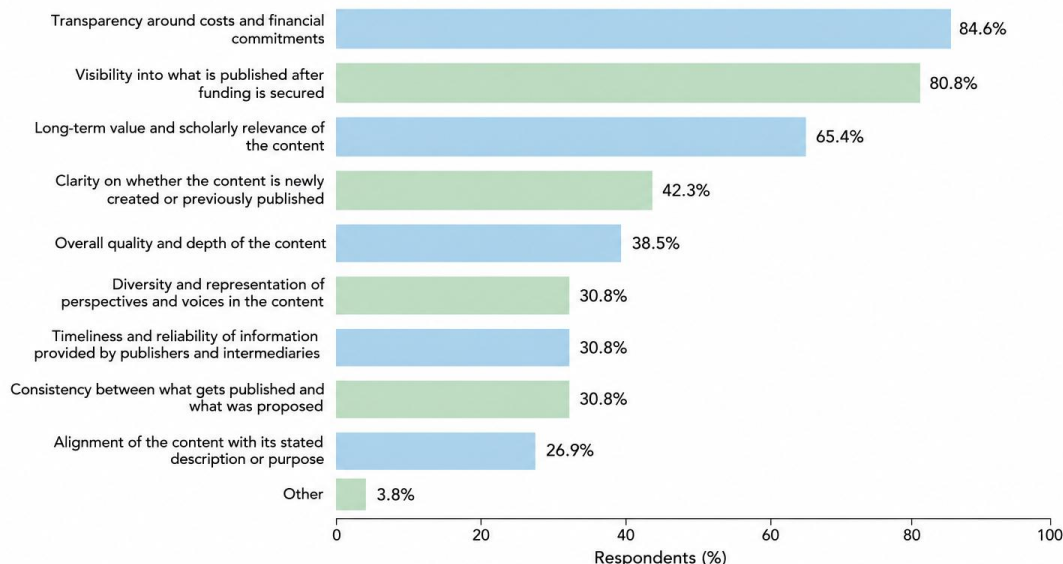
The survey also revealed strong concern regarding transparency of costs and financial commitments, visibility into what content is ultimately published after funding is secured, clarity regarding metadata quality and reporting practices, and the long-term scholarly value and relevance of funded content. Importantly, even the lowest-ranked concern identified by respondents, whether funded content ultimately aligned with the initiative’s stated purpose, was selected by more than one quarter of respondents. This suggests that concerns surrounding transparency, coherence, communication, discoverability, continuity, and accountability are not isolated or marginal issues within collaborative OA ecosystems, but increasingly systemic ones affecting institutional confidence across the ecosystem as a whole (Figure 3).

This distinction is important because it suggests that libraries are no longer participating merely as transactional purchasers of scholarly content. Increasingly, they function as active evaluators, coordinators, advisors, selectors, advocates, and long-term institutional stakeholders within collaborative OA ecosystems. Librarians today are frequently expected to assess funding proposals, interpret usage and metadata reports, evaluate disciplinary relevance, participate in advisory boards and selection committees, communicate institutional value internally, provide feedback to publishers and intermediaries, and help shape broader funding priorities across various OA environments.

Figure 3

Librarian Survey Results

Areas in which librarians identified the need for greater transparency and communication in collaborative OA funding models



In many ways, librarians have long been accustomed to evolving professional responsibilities, particularly since the early phases of digitization transformed collection development, licensing, discovery systems, metadata practices, and digital access infrastructures. What distinguishes the collaborative OA ecosystem, however, is that many initiatives now rely directly on libraries not only to support content financially, but also to help legitimize, evaluate, prioritize, communicate, and sustain the ecosystem itself. Libraries are therefore no longer asked simply to acquire or license scholarly material. They are expected to participate in shaping the very conditions through which OA scholarship is funded, organized, surfaced, and maintained over time.

As the number of collaborative initiatives continues to multiply (Table 1), and as the number of platforms, reporting environments, metadata systems, discovery services, and participation structures surrounding OA content continues expanding (Figure 1A), these responsibilities become difficult to manage coherently. Libraries must navigate overlapping initiatives with differing governance structures, varying transparency standards, inconsistent reporting practices, uneven metadata quality, and competing claims regarding scholarly value and institutional benefit. At the same time, many initiatives continue introducing new models, workflows, and participation expectations that require libraries to repeatedly adapt without any single framework resolving the broader fragmentation of the ecosystem itself.

As a result, institutions operate within environments shaped not only by financial limitations and competing priorities, but also by continuous evaluative pressure and institutional overload. The role of libraries within collaborative OA ecosystems has

therefore not simply changed. It has significantly expanded and intensified. Yet much of the responsibility for maintaining coherence across fragmented OA environments continues falling disproportionately on libraries themselves, even though publishers, intermediaries, platforms, and collective initiatives all contribute to shaping the structures through which OA content is funded, organized, communicated, surfaced, and sustained.

This imbalance becomes difficult to ignore as the collaborative OA ecosystem continues scaling internationally and becoming more interconnected. If libraries are expected not only to fund OA models and content, but also to evaluate, interpret, coordinate, advise upon, and sustain them over time, then accountability and long-term coherence can no longer remain concentrated primarily at the institutional level alone. Shared responsibility across publishers, intermediaries, libraries, infrastructure providers, and funding initiatives becomes necessary if collaborative OA ecosystems are to remain trustworthy, transparent, navigable, and sustainable at scale.

The urgency of these questions becomes even greater as AI systems begin interacting with OA scholarship not simply as isolated publications, but as interconnected and machine-readable knowledge environments. What libraries, publishers, intermediaries, and OA initiatives collectively support today increasingly shapes what later becomes visible, discoverable, and reusable across future scholarly and AI-driven systems.

2.3 Artificial Intelligence and OA Publishing

The increasing role of AI systems and LLMs in accessing, synthesizing, retrieving, and redistributing scholarly content adds further urgency to the questions surrounding collaborative OA environments. Over the past several years, discussions concerning AI and scholarly communication have expanded rapidly across academic publishing, policy, and research settings. Much of this discussion has focused on issues such as AI-generated content, authorship, copyright, misinformation, algorithmic bias, research integrity, and the use of generative systems within teaching and research workflows.

While these concerns remain very important, this paper approaches the relationship between AI and publishing from a different perspective. The central question is no longer only how AI may affect scholarship, but also about how the collaborative OA network is becoming part of the knowledge environments through which AI systems learn, retrieve, summarize, synthesize, and redistribute scholarly information.

Research published OA has become some of the most accessible and machine-readable material available for large-scale analysis and AI-driven knowledge systems. Because OA books, journals, and repositories are usually published under CC licenses, they are not subject to many of the technical and legal restrictions associated with licensed content and are therefore significantly easier to index, harvest, process, and integrate into AI systems.

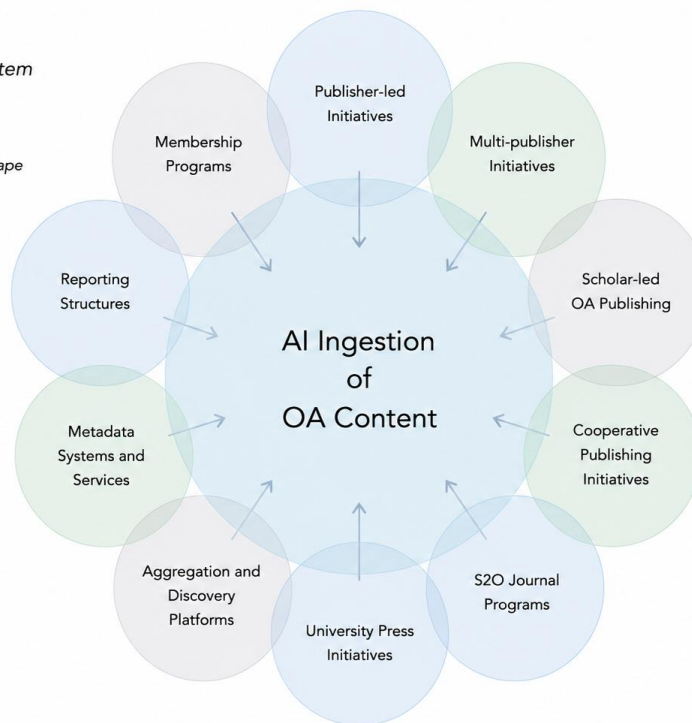
As a result, OA content is no longer simply reaching human readers. It is also being integrated into knowledge environments through which machine-mediated systems learn,

summarize, retrieve, and redistribute information and published research (Figure 1B). This shift introduces new pressures and new questions regarding how OA content is selected for funding and circulated globally post-publication. What becomes openly available shapes not only what scholars and institutions can access directly, but also what becomes visible, discoverable, retrievable, and reusable within broader knowledge environments.

Figure 1B

*Collaborative OA Ecosystem
in the Age of AI*

*A diverse and expanding landscape
of OA initiatives, which make
content available to AI*



Several broader structural realities follow from this shift:

- ❖ First, AI systems operate through scale, aggregation, and pattern recognition. Unlike researchers, librarians, editors, or peer reviewers, they do not evaluate scholarship through disciplinary expertise or contextual judgment alone. Instead, they process large volumes of content through metadata, citation patterns, indexing systems, and repeated patterns of visibility across digital environments.
- ❖ Second, visibility itself shapes influence within AI-mediated environments. Content that is openly accessible, consistently structured, well-indexed, and widely distributed becomes much easier to surface, summarize, connect, and reproduce. In practice, this means that the long-term visibility and discoverability of scholarly content affect how future knowledge systems encounter and represent scholarship at scale.
- ❖ Third, the rapid expansion of the collaborative OA ecosystem, now comprising various types of actors and partnerships, introduces growing pressures surrounding coherence, transparency, metadata quality, reporting consistency, and

discoverability. Fragmented or inconsistently maintained environments no longer affect only publishers, libraries, or institutional funding structures. They also shape the quality, reliability, coherence, and visibility of the scholarly material ingested into AI systems (Figure 1B).

- ❖ Finally, these developments place growing pressure on institutions already navigating complex OA systems. As discussed in the previous section, libraries are now expected not only to financially support OA initiatives, but also to review reporting practices, assess metadata quality, evaluate disciplinary relevance, participate in advisory work, and help maintain long-term accountability across the ecosystem. At the same time, the scale and complexity of interconnected publishing and AI environments make it unrealistic for libraries alone to carry responsibility for maintaining coherence across fragmented funding and publishing systems.

At the same time, broader DOA discussions often frame scholarly knowledge as a digital public good supported through shared infrastructures, open licensing, collective responsibility, and long-term accessibility (UNESCO, n.d.). Following the publication of the author's earlier research on the sustainability of collaborative OA monograph funding models in 2021 (Roncevic, 2021a; Roncevic, 2021b), DOA entered a new phase of international recognition and policy development. Initiatives such as the Action Plan for Diamond Open Access, the DIAMAS project, and UNESCO's growing involvement in DOA discussions reflected a broader shift toward treating collaborative OA as a major structural component of scholarly communication rather than an experimental alternative (Ancion et al., 2022; DIAMAS Project, 2025; UNESCO, n.d.).

Meanwhile, collaborative OA models and infrastructures continued expanding across books, journals, scholarly blogs, scholarly videos, and other content types. S2O)models also gained attention within journal publishing as another form of collective funding sustainability. Together, these developments reinforced the broader movement toward shared institutional responsibility within scholarly communication.

Yet while editorial and peer review systems continue to provide quality control at the level of individual publications, far less attention has been given to how OA content becomes published OA in the first place. The process from proposal to publication involves funding decisions, evaluation, communication, metadata management, reporting, discoverability, and long-term follow-through. These processes shape what enters the global knowledge ecosystem and what remains visible within it over time.

As collaborative models and programs continue growing in size and complexity, questions of content quality, relevance, coherence, transparency, and accountability, become closely tied to questions of machine-driven visibility and future knowledge reuse (Figure 1B).

A growing structural gap has therefore emerged between responsibilities traditionally associated with publishers and those carried by libraries, institutions, and funders. Although many of these activities already exist in practice, they often remain fragmented,

insufficiently connected, or compressed within accelerated funding and publishing initiatives that leave little room for broader coordination and reflection.

This gap can no longer be ignored.

If left insufficiently examined or coordinated, it risks contributing to uneven knowledge environments at precisely the moment when AI systems are amplifying OA scholarly content at unprecedented scale (Figure 1B). What's more, fragmented OA systems no longer affect only publishers, libraries, or funding structures. They also shape the value and worth of the scholarly material that researchers, institutions, AI systems, and the broader public rely upon to access, interpret, and build future research.

The challenge, then, is no longer limited to making scholarship openly available. It now concerns the conditions through which openly available scholarship becomes organized, surfaced, interpreted, preserved, and reused within globally interconnected and AI-mediated knowledge environments.

The concept of metatitorial emerges within the growing space between publishers and collaborative OA initiatives seeking institutional support, and the libraries, funders, and institutions expected to evaluate, interpret, coordinate, and help sustain the continuous publishing of OA content, while researchers, authors, and general readers will continue to depend on the quality, timeliness, and coherence of the scholarly material surfaced through AI systems.

3.

Introducing Metatorial

The previous chapters demonstrated that the collaborative OA ecosystem has become increasingly complex, interconnected, and challenging to keep up with (Figure 1A). Libraries, publishers, IT and other intermediaries, institutions, and funders now operate within environments shaped by collective financial participation, expanding metadata systems, uneven reporting structures, growing evaluative pressures, and rising expectations surrounding transparency, discoverability, accountability, and long-term scholarly value.

Those responsible for allocating and sustaining funding are often expected to evaluate complex publishing environments without fully understanding what is being proposed, how content is selected and organized, how outcomes will be communicated, or what long-term responsibilities and expectations accompany participation. As the author's 2026 librarian survey revealed, the vast majority of librarians making decisions about funding collective OA initiatives do not think the information they need to make informed decisions is as transparent as it needs to be (Figure 2). In fact, only 15 percent felt they had everything they needed to proceed with their decision making.

This growing disconnect has become especially visible at the point where scholarly publishing and institutional funding intersect. Publishers, intermediaries, and OA initiatives increasingly depend on libraries for collective financial support, while libraries increasingly depend on publishers and intermediaries for clarity, consistency, transparency, long-term follow-through.

It is within this widening space of institutional uncertainty, evaluative fatigue, fragmented communication, and growing pressure for accountability that the concept of metatorial begins to emerge. Metatorial refers to a developing set of evaluative, organizational, communicative, contextual, and continuity practices intended to strengthen the quality, coherence, and relevance of the content being financially supported for OA publication. It also refers to the transparency of the entire OA publishing, funding, and post-funding process as well as to the accountability of all parties involved.

More specifically, metatorial is intended to help libraries and institutions more clearly understand, evaluate, compare, track, and interpret the initiatives they are asked to support. Likewise, it is intended to strengthen the timeliness and long-term visibility of openly available scholarship as that scholarship circulates across repositories, discovery systems, metadata infrastructures, and AI-mediated knowledge environments that shape how future generations of researchers encounter and reuse scholarly information.

The term metatorial itself intentionally bridges two traditions. It acknowledges editorial practice as one of the central foundations of scholarly publishing while also recognizing the growing importance of metadata organization, institutional evaluation, discoverability, and long-term knowledge management within library and information systems. In this sense, the ‘editorial’ element honors the backbone of scholarly publishing, while the ‘meta’ element honors the organizational and interpretive foundations associated with libraries and knowledge infrastructures. The prefix also signals a broader layer of reflection, coordination, and evaluation that extends beyond the editorial process itself.

3.1 Metatorial as a Structural Layer

Metatorial is proposed here as a clearly-defined and essential structural layer within the collaborative OA ecosystem. It is not proposed as an auxiliary activity, temporary initiative, or additional administrative task, but as a distinct structural layer within the funding ecosystem surrounding collaborative OA initiatives.

These increasingly complex environments now rely upon a broad range of actors performing interconnected forms of labor. Publishers develop and curate scholarly content. Libraries and institutions evaluate initiatives, assess relevance, and allocate funding support. Funders distribute financial resources and shape broader priorities surrounding openness, sustainability, and scholarly impact. Intermediaries coordinate participation structures, aggregation models, and reporting environments designed to provide institutions and publishers with insight into usage patterns, institutional participation, and geographic reach across collaborative OA ecosystems. Metadata specialists and infrastructure providers support discoverability, indexing, preservation, and systems integration. Meanwhile, open scholarship circulates across repositories, library catalogs, discovery platforms, and AI-mediated environments.

What remains insufficiently defined is the structural layer operating between all of these functions and helping to maintain coherence across them. Metatorial is intended to address this gap. Its purpose is to establish a clearer framework through which the evaluative, organizational, communicative responsibilities can become more visible, coordinated, understood, and sustainable across the ecosystem as a whole.

Importantly, metatorial is not proposed as a replacement for editorial review, peer review, publishing operations, metadata management, collection development, or institutional funding decisions themselves. Nor is it intended to duplicate responsibilities already carried by publishers, libraries, or intermediaries. Rather, it operates across the spaces connecting these responsibilities, particularly at the point where communication between scholarly publishing and institutional funding structures remains weakest.

This distinction is important because many of the responsibilities associated with metatorial already exist throughout the ecosystem. Libraries already evaluate collections, relevance, transparency, and institutional priorities. Publishers already shape scholarly direction, editorial identity, and communication practices. Metadata specialists already

support discoverability and systems integration. Intermediaries already coordinate participation structures and reporting workflows. Yet no clearly recognized structural layer currently exists that explicitly connects these responsibilities across the full lifecycle of collectively funded OA content in ways that help institutions understand not only what they are funding, but also what kinds of scholarly environments they are collectively helping sustain over time.

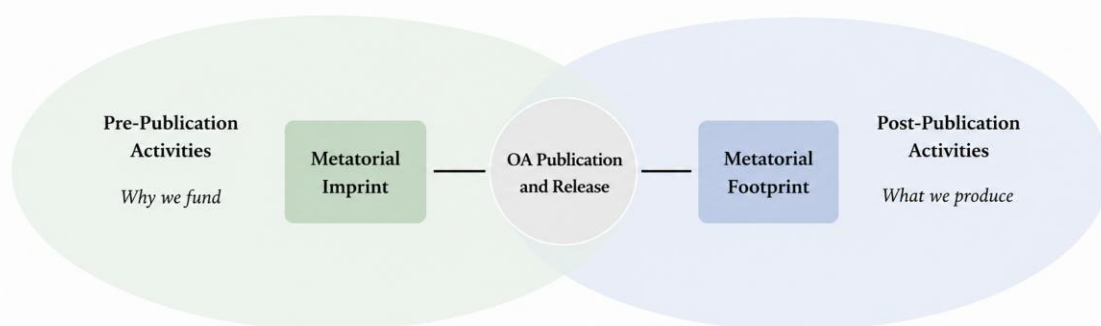
Metatorial is therefore proposed as a permanent and necessary part of the collaborative OA ecosystem rather than an afterthought attached to existing structures. Just as editorial work, metadata management, peer review, and collection development are recognized as essential components of scholarly communication systems, *metatorial* is proposed here as a distinct structural layer addressing the growing need for coherence between scholarly publishing, collective funding, institutional evaluation, discoverability, and long-term knowledge care within interconnected OA environments.

Metatorial operates across two interconnected stages in the journey of scholarly content from creation to distribution: *mediatorial imprint* and *metatorial footprint* (Figure 4A). The imprint concerns the evaluative and organizational layer surrounding content before funding and publication. The footprint concerns the long-term visibility, discoverability, and coherence, of that content after publication and circulation across scholarly and AI-mediated knowledge environments.

Figure 4A

Metatorial Imprint and Metatorial Footprint

How metatorial imprint and metatorial footprint are positioned within the scholarly publishing process



3.2 Metatorial Imprint

Metatorial imprint refers to the stage in the OA publishing process before funding is allocated and before content enters broader OA circulation. It concerns the evaluative and communicative layer surrounding how scholarly content, collections, initiatives, business models, and publishing programs are presented to funders and funding institutions. It also

concerns how they are grouped, presented, prioritized, and positioned for institutional support.

At this stage, metatutorial raises a wide range of pre-funding questions, including:

- What type of scholarly content is being funded?
- Is the funding request clearly attached to individual titles, a collection, a journal package, a publisher program, an infrastructure, or a broader publishing initiative?
- How coherent is the collection, initiative, or publishing program being presented?
- How closely does the proposed content align with the initiative's stated disciplinary, scholarly, geographic, linguistic, or thematic goals?
- How timely is the content, and how relevant is it to current research priorities across disciplines?
- Who selected the content being proposed for funding?
- If selection committees were involved, who served on them, what expertise did they bring, how were decisions made, and how transparent was the voting process?
- If the initiative is publisher-led, how clearly is the publisher's editorial identity, scholarly reputation, disciplinary strength, and publishing history tied to the content?
- If the initiative is multi-publisher, how diverse and balanced is the group of participating publishers?
- If the initiative is not single publisher-led, does the initiative include university presses, scholar-led presses, independent publishers, born-OA programs, or publishers from less visible regions and language communities?
- Are authors from underfunded institutions, less affluent publishing markets, early-career scholars, independent researchers, or historically underrepresented communities meaningfully represented?
- Are the participating authors, editors, journals, presses, or subject areas relevant to the institutions being asked to provide support?
- Are libraries and funders given enough information to understand why this content deserves collective support?
- Are the costs attached to the initiative clearly explained?
- If APCs, BPCs, or title-level publication costs are involved, are libraries and funders able to understand those costs in advance, and how they relate to the outcomes of the funding campaigns?
- Is the funding request for one year or multiple years?
- If a multi-year commitment is needed, is the rationale clearly explained and, in fact, necessary?
- What happens if the funding target is not reached?
- What content will be published OA if partial funding is secured? Who will decide and how?
- What content will not be published OA if funding falls short? Who will decide and how?

- How clearly are metadata practices, discoverability plans, preservation arrangements, reporting expectations, and delivery timelines communicated?
- What kinds of reports will libraries and funders receive after funding is secured?
- Will reports show only usage and participation, or will they also explain what was published, how it performed, where it became visible, and whether the initiative delivered what it promised?
- Are the promotional and supporting materials provided to libraries clear, complete, consistent, and useful for internal decision-making?
- What kinds of organizations are institutions being asked to sustain: commercial publishers, nonprofit presses, scholar-led initiatives, university presses, infrastructure providers, intermediaries, or hybrid structures?
- What scholarly communities, publishing practices, and knowledge environments are institutions ultimately helping to support?

The imprint therefore concerns the structural framing surrounding collective funding decisions *before* content becomes published OA and enters wider circulation. It asks whether libraries, funders, and institutions are being given enough clarity, context, and evaluative grounding to make responsible funding decisions.

The imprint does not operate only at the level of individual titles or isolated editorial decisions. It operates at the level of collections, initiatives, and publishing programs and business models. This makes the imprint practices more complex than traditional title-by-title evaluation. Libraries and funders are often asked to support grouped content, multi-publisher collections, various packages, membership programs, or publishing infrastructures whose value cannot be judged through a single editorial decision alone. The imprint explicitly asks how and why various OA initiatives justify institutional support before funding decisions are made.

In short, the imprint stage concerns the clarity, intentionality, and evaluative strength of collective OA funding *before* content enters long-term circulation and becomes available for wider scholarly, institutional, public, and AI-mediated use.

3.3 Metatorial Footprint

If the imprint concerns the stage of metatorial before funding and publication, the footprint concerns what happens after content enters the scholarly ecosystem and begins accumulating visibility, reuse, infrastructural presence, and machine-readable circulation.

Metatorial footprint refers to the long-term scholarly, organizational, metadata-driven, and infrastructural traces created through collective OA funding practices. It concerns how openly available scholarly content continues to exist, circulate, remain visible, and retain coherence after publication across repositories, metadata systems, indexing services, library catalogs, and AI-mediated knowledge systems.

At this stage, metatorial raises a different but equally important set of post-publication questions, including:

- What content ultimately became openly available after funding was secured?
- Was the funded content delivered within the timelines originally communicated to libraries and funders?
- Did the initiative ultimately publish the quantity, disciplinary scope, and type of content originally proposed?
- If changes occurred after funding, were those changes communicated clearly and transparently to participating institutions?
- How visible and discoverable did the published content become across scholarly systems?
- Was the content distributed consistently across repositories, indexing systems, discovery services, metadata aggregators, and preservation infrastructures?
- Is the content being surfaced primarily through publisher-controlled platforms, or is it also integrated into broader discovery systems?
- Are metadata records complete, standardized, interoperable, and sufficiently maintained over time?
- Does the content remain easy to locate, identify, cite, retrieve, and reuse across scholarly and computational environments?
- How widely and consistently does openly available content remain accessible across repositories, library systems, educational platforms, indexing services, and machine-readable environments after publication?
- What kinds of reporting are institutions able to access after publication?
- Does the initiative continue communicating with participating institutions after publication, including updates regarding delivery, corrections, metadata revisions, preservation issues, and long-term accessibility?
- How consistently are corrections, withdrawn publications, metadata updates, version changes, or preservation-related problems communicated across repositories, platforms, and discovery systems?
- What forms of preservation and long-term accessibility are in place if platforms, initiatives, intermediaries, or publishers later change direction, reduce services, or cease operations?
- Does the initiative contribute to stable long-term scholarly infrastructures that preserve discoverability, metadata continuity, and reliable access over time, or does visibility depend primarily on temporary platform exposure and promotional activity?
- Do certain disciplines receive substantially greater visibility and support than others within the collaborative OA ecosystem?
- Do English-language publications become disproportionately dominant within various discovery systems?
- Are smaller language communities and regional publishing initiatives able to remain visible and discoverable after publication or do they remain largely marginalized?

- Do collaborative OA funding environments continue supporting a broad range of scholarly communities, publishing traditions, and disciplinary perspectives over time?
- Which types of publishers, disciplines, and scholarly perspectives become most consistently surfaced through large-scale aggregation, indexing, and AI systems?
- Do underrepresented disciplines, languages, geographic regions, and scholarly perspectives remain visible after publication, or do they become progressively less discoverable within large-scale aggregation and indexing systems?
- Is the published content structured, licensed, and distributed in ways that allow AI systems, discovery tools, and research environments to reliably identify, retrieve, interpret, and connect the material within larger scholarly networks?
- How do collective OA funding decisions ultimately shape which scholarly content becomes most visible, reusable, and repeatedly surfaced within future AI-mediated knowledge systems?

The footprint therefore concerns the long-term consequences of OA funding after scholarly content enters wider scholarly circulation. It examines whether openly available scholarship remains visible, discoverable, reusable, preserved, and contextually meaningful across human and machine-mediated knowledge and information systems.

Importantly, the footprint does not concern usage metrics alone. High download counts or broad distribution do not necessarily indicate long-term scholarly value, preservation quality, or sustained discoverability across changing infrastructures. Moreover, usage itself can never be fully measured since CC licensing allows content to circulate freely through repositories, email sharing, teaching platforms, personal archiving, and other forms of informal exchange beyond conventional reporting systems.

At its core, the footprint asks whether funded research continues to function as timely, trustworthy, and enduring knowledge after publication. The footprint also operates at a broader structural level than individual publications alone. It concerns the cumulative visibility and continuity of collections, initiatives, publishing programs, repositories, metadata systems, and collaborative infrastructures over time.

Within AI-mediated environments, the significance of the footprint becomes even greater. Openly available scholarly content can now be harvested, summarized, indexed, synthesized, and redistributed through machine-driven systems. Recent evidence from the repository community suggests that AI bots and crawlers are already interacting extensively with OA infrastructures, highlighting the growing role of repositories and discovery systems within emerging AI environments (Shearer & Walk, 2025). As a result, long-term visibility and discoverability of OA scholarship undoubtedly shape what future knowledge systems encounter, reproduce, prioritize, and amplify.

The responsibility therefore no longer ends with making research and scientific discoveries open. It continues through the ways in which OA scholarship remains discoverable, coherent, preserved, reusable, and reliably interpreted across all types of systems in the

future. In summary, the footprint stage concerns the long-term visibility, continuity, and infrastructural consequences of collective OA funding after funded content enters the global knowledge ecosystem.

3.4 The Footprint/Imprint Distinction

The distinction between metatorial imprint and metatorial footprint matters because collective OA funding decisions now shape far more than immediate publication outcomes. What institutions collectively support today may later become highly visible across repositories, metadata infrastructures, indexing systems, library discovery environments, and AI-mediated platforms that increasingly rely on openly available scholarly material as machine-readable content.

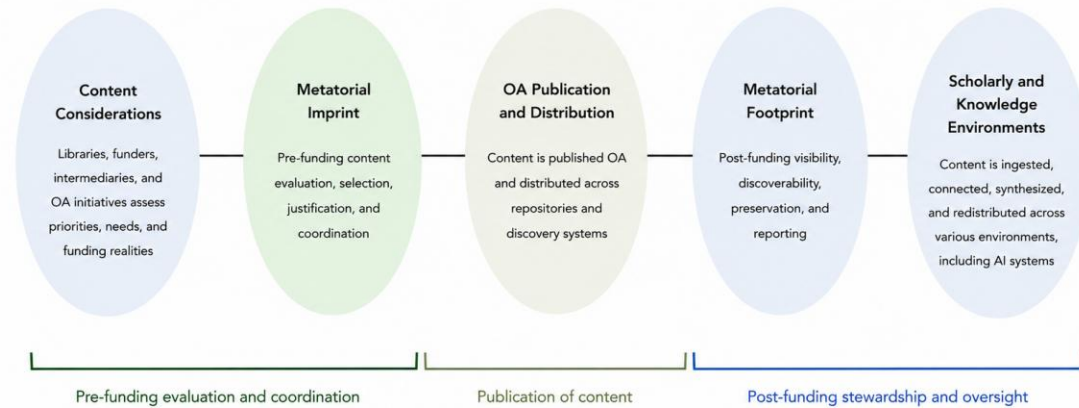
Because AI systems depend heavily on the large-scale ingestion, indexing, and statistical processing of already available digital material rather than continuously retrieving information in real time, openly available scholarship that is well-structured, consistently distributed, machine-readable, and widely discoverable is far more likely to be surfaced, summarized, connected, and reused within future AI-mediated knowledge environments. The timeliness, reliability, coherence, and scholarly quality of OA content therefore become essential not only for present-day readers, but also for the future knowledge systems through which research will later be encountered, interpreted, and redistributed. This is why responsibility can no longer end at the point of publication.

The two stages are therefore not symmetrical abstractions, but sequential responsibilities within the lifecycle of openly available scholarship. The core goal of imprint-related activities is to justify support before publication, while the core goal of footprint-related activities is to evaluate long-term consequences after publication (Figure 4B).

Figure 4B

The Metatorial Lifecycle

From imprint to footprint across the scholarly publishing process



More specifically:

- The imprint asks: “What should institutions fund and why?”
- The footprint asks: “What kind of impact did this funding decision produce?”

Taken together, metatorial imprint and metatorial footprint position OA publishing as an ongoing and evolving process of stewardship, extending collective responsibility beyond publication to the lasting value and influence of scholarly knowledge.

4.

Metatorial in Practice

Metatorial becomes most visible when moving from theory to practice. While metatorial imprint and metatorial footprint provide a framework for understanding how scholarly content is positioned before funding and how it circulates after publication, the practical value of the concept lies in how it helps publishers, intermediaries, libraries, and funders navigate complex OA environments.

Although metatorial may have relevance across many forms of scholarly communication, its importance is particularly evident within collaborative, collectively funded OA environments. By pooling resources across institutions, these models can support more content than individual libraries, authors, or publishers could usually sustain alone. They also have staying power because they distribute financial responsibility across wider networks rather than placing the full burden on a single institution or author. At the same time, these models require institutions to make funding decisions before the long-term impact of the content can be fully known. Libraries are therefore evaluating not only publications themselves, but also publishing programs, funding structures, reporting practices, metadata quality, governance arrangements, and ongoing commitments.

The challenge is not simply one of access. It is one of understanding. Institutions are expected to determine which initiatives deserve support, which publishing environments align with institutional priorities, and which forms of scholarly communication are likely to provide lasting value to research communities. As AI tools and platforms reshape how scholarship is searched, organized, summarized, and redistributed, these decisions also carry a new temporal pressure. Institutions are not only supporting content that should become OA. They are helping determine which scholarship becomes available, discoverable, and reusable at the moment when future knowledge systems are being shaped.

Books and journals both depend on collective participation, but they do so in different ways. In book funding, institutions often support defined titles, collections, or publisher programs whose OA publication depends on the success of a funding campaign. In journal funding, institutions often support the continued operation of journals whose future content will be produced over time. The difference is therefore not between collective and non-collective participation. It is between funding a defined body of scholarly content and sustaining an ongoing publishing environment.

4.1 Metatorial for Scholarly Books

Collective funding models for scholarly books have played an important role in the development of contemporary OA and DOA publishing. Through intermediary-led initiatives, publisher-led programs, library memberships, and community-supported models, institutions are frequently asked to support books before publication and before

their long-term scholarly impact can be known. In many cases, libraries are encountering the proposed titles, authors, editors, or collections for the first time during the funding process. As a result, funding decisions depend heavily on the quality of information provided about the content, the publishing program, and the broader scholarly goals being advanced.

At the imprint stage, institutions expect publishers and organizations to provide sufficient context to support informed funding decisions. This includes clear explanations of how content was selected, how collections fit together intellectually, how proposed publications align with stated disciplinary, thematic, or scholarly objectives, and how funding will affect what ultimately becomes openly available.

Strong metatorial imprint for books is evident when publishers and intermediaries:

- Clearly explain why particular books or collections have been nominated internally for OA funding.
- Demonstrate the scholarly coherence of proposed collections.
- Provide appropriate context regarding authors' and editors' credentials, affiliations, disciplinary standing, and relevance to the proposed collection or initiative.
- Articulate the editorial vision and objectives behind the initiative or particular collection.
- Communicate costs, timelines, funding thresholds, and anticipated outcomes clearly.
- Explain how funding decisions influence what content will ultimately be published OA.
- Provide realistic expectations regarding reporting, communication, and post-publication follow-through.
- Help institutions understand the scholarly communities, disciplines, and publishing environments they are being asked to support.
- Clarify how different versions and formats will be handled, including PDF, EPUB, print, platform access, and any commercial editions that may continue to be sold alongside the OA version.
- If books are not born-OA, explain clearly when they were first published, how, and what the act of 'flipping' them to OA will mean for the larger scholarly community.
- Explain whether the same content may appear in other packages, platforms, collections, or sales channels, so that libraries can understand how OA funding relates to other forms of purchasing, licensing, or access.

Metatorial practice becomes visible when publishers move beyond creating the content through editorial work and promoting the content through marketing. It enters the space where editorial judgment, marketing language, sales communication, and institutional funding outreach meet. In that space, publishers and intermediaries need to help institutions understand why particular monographs or edited scholarly collections deserve collective support, how they are being positioned, and what libraries are actually helping to make possible.

The footprint for books becomes visible after publication, when attention shifts from proposed outcomes to demonstrated outcomes. At this stage, institutions should be able to assess whether commitments made during the funding process were fulfilled and whether published content remains accessible and useful over time.

Strong metatorial footprint for books is evident when publishers and intermediaries:

- Clearly communicate what content was ultimately published through collective support.
- Report on whether publication goals and commitments were fulfilled, and explain any significant changes from the original funding proposal.
- Maintain complete, accurate, and interoperable metadata across platforms and discovery systems, including persistent identifiers, author and editor information, subject classifications, licensing information, abstracts, keywords, and institutional or funder acknowledgments where appropriate.
- Ensure content is distributed through repositories, library systems, indexing services, metadata aggregators, publisher platforms, and other relevant discovery environments.
- Provide meaningful post-publication reporting that extends beyond usage statistics alone, including publication outcomes, delivery timelines, metadata distribution, repository deposits, preservation arrangements, format availability, and discoverability status.
- Communicate where content has become visible and discoverable after publication, including major platforms, repositories, indexing services, library discovery systems, and educational or research settings.
- Support long-term preservation and explain how content will remain accessible if platforms, business models, intermediaries, or organizational structures change over time.
- Demonstrate how funded content continues to circulate within scholarly, educational, public, and machine-readable environments, while recognizing that not all circulation can be captured through usage reports alone.

Several challenges continue to affect collectively funded OA book initiatives. Collections may vary considerably in disciplinary coherence. Reporting practices differ substantially across initiatives. Metadata quality and discoverability remain uneven. Libraries are often required to evaluate and compare a growing number of programs, each operating with different expectations, workflows, reporting structures, and definitions of success.

These challenges do not necessarily reflect weaknesses in individual initiatives. Rather, they highlight the growing importance of metatorial practice. The goal is not simply to make books openly available after funding is collected and distributed where needed. It is to ensure that the process connecting selection, funding, publication, preservation, and long-term stewardship remains transparent, coherent, and reflective of relevant and timely scholarship.

4.2 Metatorial for Scholarly Journals

Many of the principles underlying metatorial practice for books also apply to journals, but journal publishing introduces a different set of practical considerations. Unlike books, which are often funded as defined collections of frontlist or backlist titles or publication programs, journals operate as continuing publishing environments. Institutions supporting journal models are therefore helping to sustain the ongoing publication of future scholarly content, i.e., content that has not yet been written, reviewed, accepted, or published.

Within journal publishing, metatorial practice is particularly visible in collective support models such as S2O, where continued institutional participation helps ensure that existing and often well-known journals remain openly accessible. In these environments, institutions are not evaluating only individual articles. They are evaluating the long-term sustainability, governance, editorial direction, and stewardship of a journal or a portfolio of journals.

At the imprint stage, institutions expect clarity regarding the journals' purpose, governance, editorial direction, business model, and relationship to the scholarly communities they serve.

Strong metatorial imprint for journals is evident when publishers and intermediaries:

- Clearly articulate the journal's or the journal portfolio's scholarly mission and disciplinary focus.
- Demonstrate transparent editorial and peer-review practices.
- Communicate governance structures and decision-making processes.
- Explain how collective funding contributes to the journal's or the publisher's sustainability.
- Describe funding expectations clearly, including pricing logic, renewal expectations, participation thresholds, institutional commitments, and what happens if support levels change.
- Explain the business model in accessible language, particularly in S2O contexts where pricing structures, renewal conditions, participation expectations, and access outcomes may differ significantly from one initiative to another.
- Outline how funding outcomes and publishing progress will be communicated over time.
- Provide evidence of rigorous scholarship as the backbone of journals to be funded rather than rely on established reputation, historical standing, or the publisher's prior relationships with libraries.

Metatorial practice becomes visible when publishers help institutions understand not only the quality of the journal's current content and future direction, but also the broader publishing environment they are being asked to sustain. This includes transparency regarding governance and long-term publishing objectives.

The footprint of a journal develops gradually through ongoing publication, discoverability, preservation, and continued engagement with scholarly communities. Because journals evolve over time, their footprint is shaped not by a single publication event but by the cumulative effect of editorial, publishing, technical, and stewardship decisions made across years and sometimes decades.

Strong metatorial footprint for journals is evident when publishers and intermediaries:

- Maintain consistent publication schedules and editorial standards.
- Ensure strong discoverability across indexing and abstracting services, repositories, library discovery systems, and relevant scholarly platforms.
- Support accurate, interoperable, and well-maintained metadata for articles, authors, issues, licenses, funding information, persistent identifiers, and indexing records.
- Communicate publication outcomes and significant developments (e.g., impact factor) regularly.
- Demonstrate long-term commitments to preservation and openness, even in less-than-ideal funding cycles.
- Provide transparency regarding governance, ownership, platform arrangements, and operational continuity.
- Show how collective support contributes to the ongoing strength and sustainability of the journal.
- Maintain visibility and relevance across both human and machine-mediated discovery environments.

Journal publishing presents distinctive challenges. Institutions often encounter varying levels of transparency, different reporting standards, complex pricing structures, and differing approaches to accountability across initiatives. Because journals are ongoing enterprises, assessing success through short-term metrics alone can be difficult. Citation counts, downloads, impact factors, and participation levels may provide useful signals, but they do not fully capture governance quality, editorial continuity, disciplinary relevance, preservation, or the journal's long-term value to its scholarly community.

Metatorial practice helps address these challenges by encouraging stronger connections between editorial activity, collective funding, reporting, and long-term stewardship. In doing so, it helps institutions understand not only what they are supporting today, but also the scholarly journal environments they are helping sustain into the future.

4.3 Indicators of Exemplary Metatorial Practices

Metatorial is proposed here as a developing framework rather than a fixed methodology. As the collaborative OA ecosystem continues to grow and expand, the specific forms that metatorial practices take will also vary. Different publishers, intermediaries, library consortia, infrastructure providers, scholar-led initiatives, university presses, commercial publishers, corporations, nonprofit organizations, and community-supported programs will approach these responsibilities in different ways.

Nevertheless, certain characteristics consistently emerge when metatorial practice is functioning well across the board. These characteristics do not constitute a formal checklist or assessment system. Rather, they indicate whether an initiative is successfully connecting imprint and footprint, i.e., whether it can explain why content deserves support before publication as well as demonstrate what that support produced after publication.

Exemplary metatorial practice is often characterized by:

- Clear articulation of scholarly purpose, editorial direction, and publishing goals.
- Timely and productive communication before, during, and after funding decisions are made.
- Transparent ongoing communication regarding funding structures, costs, participation expectations, and outcomes.
- Alignment between stated objectives and the content ultimately selected for support.
- Evidence that publishers and intermediaries can explain why particular content, journals, collections, or programs deserve collective support.
- Reporting that connects institutional support to tangible publishing outcomes.
- Metadata practices that support discoverability, interoperability, citation, preservation, and long-term access.
- Clear communication regarding publication formats, licensing, repository distribution, platform access, and any continuing commercial editions or sales channels.
- Attention to preservation, continuity, and the long-term stewardship of scholarly content.
- Recognition of diverse scholarly communities, disciplines, languages, publishing traditions, and geographic perspectives.
- Evidence that initiatives remain accountable not only to their own organizational goals but also to the institutions and communities that help sustain them.
- Preparation for machine-readable and AI-mediated knowledge environments.

Importantly, metatorial practice should not be understood as replacing editorial expertise, peer review, collection development, metadata management, publishing operations, sales communication, marketing, or institutional decision-making. Rather, it operates across the spaces connecting these activities and helps create greater consistency between them.

For this reason, metatorial should also be understood as a developing area of professional practice. Many of the responsibilities associated with metatorial already exist throughout the OA ecosystem, although they often remain distributed across multiple organizations and professional roles. Publishers communicate editorial priorities and publishing objectives. Libraries evaluate relevance and institutional value. Metadata specialists support discoverability and interoperability. Intermediaries coordinate participation, reporting, and communication. Infrastructure providers help ensure continuity, preservation, and access.

What remains less clearly defined is how these responsibilities connect to one another and who assumes responsibility for maintaining coherence across the publishing lifecycle as a whole.

As collaborative OA environments continue to mature, new forms of expertise may emerge around these activities. Some organizations may integrate metatorial responsibilities into existing publishing, library, sales, communications, metadata, or infrastructure roles. Others may develop dedicated positions, advisory functions, working groups, or collaborative structures that explicitly address communication, accountability, discoverability, and long-term coordination across funding and publishing environments.

The purpose of metatorial is not to prescribe a single organizational model or professional pathway. Rather, it is to recognize a growing need for new kinds of interrelated responsibilities that have become integral to OA publishing.

Ultimately, effective metatorial practices ensure that collective funding decisions are not viewed merely as financial transactions. They become part of a broader process through which scholarly communities, institutions, publishers, and supporting organizations work together to shape what knowledge becomes openly available, when, and how it remains discoverable and usable over time.

In doing so, metatorial recognizes that responsibility for the long-term value of scholarly communication does not reside with any single publisher, library, funder, intermediary, or institution. It is woven across the ecosystem itself, revealing that the enduring challenge of open scholarship is not simply making knowledge available, but ensuring that it remains meaningful, discoverable, and usable long after publication.

5.

Why Metatorial Matters

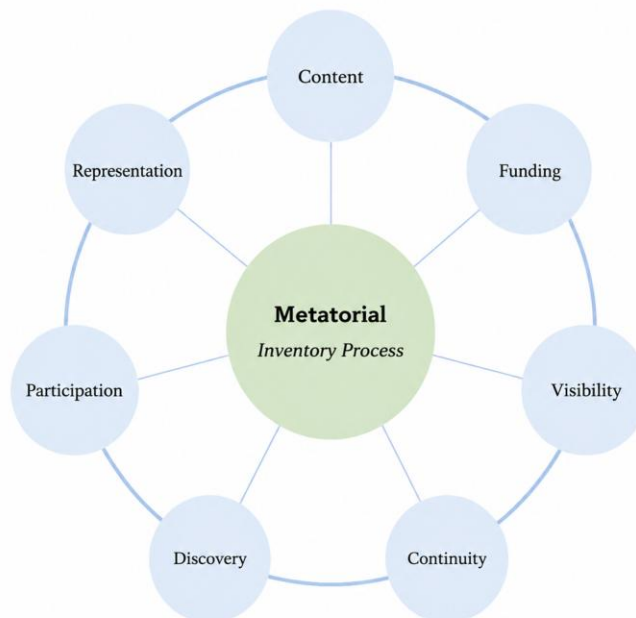
The preceding chapters introduced metatorial as a framework for understanding how scholarly content is evaluated, funded, published, distributed, discovered, preserved, and ultimately integrated into broader environments. Through the distinction between metatorial imprint and metatorial footprint, the framework draws attention to responsibilities that extend beyond traditional editorial evaluation and beyond OA publication itself.

The purpose of metatorial is not to create another assessment system, reporting requirement, or administrative layer. Nor is it intended to function as a checklist or a ‘test’ which initiatives either pass or fail. Rather, metatorial is best understood as an inventory process (Figure 5).

Figure 5

Metatorial Inventory Process

Metatorial is an inventory process through which institutions, publishers, intermediaries, and funders examine seven interconnected dimensions of collaborative OA publishing



A checklist asks whether specific tasks have been completed. An inventory asks what is actually present. It seeks to understand what content is being financially supported, which scholarly communities are being sustained through this support, how funding decisions

shape publishing priorities, how scholarship is organized and described, how it becomes discoverable, and whether it remains visible and usable over time.

Viewed in this way, metatorial encourages institutions, publishers, intermediaries, and funders to examine seven interconnected dimensions of collaborative OA publishing:

- *Content* (what is being funded, published, and made openly available)
- *Participation* (who is able to contribute to, participate in, and benefit from the funded publishing environment)
- *Representation* (which disciplines, language communities, research networks, and scholarly traditions are represented and sustained through collective funding)
- *Funding* (how collective financial support helps determine what knowledge is supported and sustained over time)
- *Discovery* (how content is described, organized, indexed, and made findable post-publication)
- *Visibility* (how content is surfaced, distributed, encountered, and reused across various online environments)
- *Continuity* (how content remains accessible, connected, preserved, and meaningful across future scholarly and knowledge environments)

By encouraging a closer examination of these dimensions, metatorial increases the likelihood that collective investments result in the publication of OA content that is relevant, useful, and responsive to the needs of the communities it is intended to serve.

Another way to understand metatorial is to consider the progression that emerges when all seven dimensions are examined together:

*What exists → Who participates → Who is represented → How it is supported →
How it is found → How it is encountered → How it endures*

Viewed collectively, these dimensions provide a structured inventory of the factors that shape not only what scholarship becomes openly available, but also how it remains useful, visible, and meaningful over time.

5.1 Beyond Access

Many of the challenges facing scholarly communication today are no longer primarily questions of access. Considerable progress has been made in expanding the availability of OA content through publisher-led initiatives, scholar-led publishing, multi-disciplinary and multi-publisher funding models, university presses, S2O programs for journals, and a growing network of supporting organizations and infrastructures.

Yet making scholarship openly available does not automatically ensure that it remains discoverable, coherent, well described, widely distributed, or preserved over time. Nor does openness alone explain how institutions should evaluate competing initiatives, determine funding priorities, or understand the long-term consequences of their funding decisions.

Metatorial addresses this widening gap between availability and understanding. It encourages stakeholders to look beyond whether content is open and to consider how that content is selected, positioned, distributed, maintained, and incorporated into broader systems of scholarly communication.

In this sense, metatorial matters because it does not replace existing forms of evaluation. It complements them by drawing attention to relationships that often remain invisible until problems emerge.

5.2 What Metatorial Changes

Without metatorial, collective OA initiatives are often evaluated through isolated indicators such as participation levels, publication counts, download statistics, citation metrics, or short-term funding outcomes. While these measures can be quite useful, they rarely capture the broader environments being created through collective support.

Metatorial shifts attention from transactions to inventories. Rather than focusing exclusively on whether funding was provided, it encourages participants across the OA ecosystem to examine what that funding accomplishes produces over time. In this way, the goal is not simply to determine whether an initiative succeeded financially because it received enough financial support, but to understand what was actually created through collective participation and whether those outcomes align with the objectives originally presented to participating institutions.

5.3 Why the Stakes Are Higher Now

The importance of metatorial grows significantly with the emergence of large-scale AI systems and machine-mediated knowledge environments. Recent discussions among libraries and publishing professionals suggest that AI is becoming an unavoidably important factor in how scholarly content is discovered, interpreted, and reused across the scholarly communication ecosystem (Springer Nature, 2025).

Historically, weaknesses in discoverability, metadata quality, preservation, reporting, or distribution often affected individual platforms, publishers, or collections. Today, those same weaknesses can influence how scholarship is aggregated, connected, interpreted, and redistributed across much larger systems, extending well beyond traditional academic environments.

AI systems do not evaluate content in the same manner as traditional editors, librarians, reviewers, or researchers. They rely on large-scale ingestion, indexing, retrieval, synthesis, and recombination of existing scholarly materials. As a result, decisions made throughout the publishing lifecycle greatly influence not only whether content is available, but also whether it becomes visible within future knowledge environments.

- What enters these systems matters.
- What remains discoverable matters.

- What becomes repeatedly surfaced matters.
- What disappears matters.

The consequences extend far beyond individual books, journal articles, or hosting platforms. They shape and will continue to shape how scholarship is encountered, interpreted, connected, and reused by researchers, students, institutions, and knowledge systems.

5.4 Collective Responsibility

One of the central findings emerging from this paper is that responsibility for the long-term value of scholarly communication can no longer be understood as residing within any single organization or group.

Publishers remain responsible for editorial quality and publishing decisions. Libraries continue evaluating relevance and institutional value. Funders establish priorities and provide resources. Intermediaries coordinate participation and communication. Metadata specialists, infrastructure providers, repositories, indexing services, and preservation networks all contribute to the continued visibility and accessibility of scholarly content.

Increasingly, however, the outcomes produced by these actors are interconnected.

Questions of discoverability, visibility, continuity, and long-term scholarly value cannot be addressed by any one organization acting alone. They emerge through collective decisions distributed across the broader ecosystem. Metatorial, therefore, provides a framework through which those shared responsibilities can be more clearly understood and embraced.

5.5 Conclusion

The Open Science movement has expanded access to knowledge on a scale that would have been difficult to imagine only a generation ago. Yet openness alone does not determine which knowledge is funded, which scholarly communities are sustained, which publications remain visible in perpetuity, or which forms of scholarship continue shaping future systems of discovery and interpretation.

This paper proposes metatorial as one possible response to that growing challenge. It positions metatorial not as a checklist, a certification system, or a new layer of bureaucracy. Rather, it identifies it as an inventory process through which institutions, publishers, funders, intermediaries, and the scholarly community at large can better understand the content, funding structures of existing and emerging OA business models, the discovery environments, visibility patterns, and long-term impact of the scholarship they are helping to make visible and easily found.

Some readers may reasonably ask whether introducing the concept of metatorial is even necessary. Some questions that may arise:

- ❖ Do we really need a new term to describe those activities?

- ❖ Isn't this already covered by assessment, reporting, or research evaluation?
- ❖ Isn't this simply a formal description of work that libraries, publishers, intermediaries, and funders have always performed?
- ❖ Are institutions already too constrained by limited resources and competing priorities to take on another layer of analysis and terminology?
- ❖ Can the dimensions proposed here be evaluated consistently across different initiatives, disciplines, and publishing models?
- ❖ Does introducing a new framework risk adding complexity to an environment that many participants already find difficult to navigate?

These are fair questions. Indeed, if metatorial does not invite scrutiny, comparison, refinement, and even disagreement, then it is unlikely to be addressing a meaningful problem.

The purpose of this paper is not to suggest that existing evaluation practices are inadequate, nor to imply that libraries, publishers, intermediaries, and funders have failed to consider these issues. Rather, it argues that many of these activities have historically been treated as separate concerns, distributed across different organizations, workflows, and stages of the publishing lifecycle. While some activities have received sustained attention and investment, others have often remained fragmented, inconsistently performed, dependent upon individual initiative or organizational commitment, or difficult to prioritize within existing organizational structures and funding environments.

The framework proposed here emerged from years of observing how collaborative OA publishing operates in practice across libraries, publishers, intermediaries, and funding programs. During that time, it became increasingly apparent that many activities shaping the long-term value, discoverability, visibility, continuity, and broader impact of openly available scholarship were frequently discussed in isolation, addressed unevenly, or left without a clear conceptual home. The author's observation was not simply that these activities received varying levels of attention, but that they were rarely understood as interconnected responsibilities contributing to a shared publishing ecosystem. This is especially true of activities involving the acumen of editors, editorial leaders, content curators, and all those professionals whose roles involved content creation, production, presentation, and informed and educated assessment of quality.

Metatorial is thus not presented as a critique of organizations or existing models. Rather, it is an attempt to name, describe, and bring greater coherence to a set of practices that have long existed in partial and distributed forms, but which have become important within collaborative OA publishing and contemporary knowledge environments.

Metatorial proposes a way of viewing those practices and activities together. Whether the framework ultimately proves useful will depend not on the introduction of a new term, but on whether it helps institutions and organizations better understand what they are collectively supporting, how those decisions shape scholarly communication, and what consequences emerge long after scholarly publications become openly available.

Ultimately, metatorial begins from a simple premise: the future of scholarly research depends not only on making knowledge openly available, but also on ensuring that knowledge in its many forms remains trustworthy, relevant, and meaningful over time. If Open Science seeks to expand access to human knowledge, metatorial seeks to ensure that the knowledge made open and accessible remains capable of serving future generations of research, while those who fund, publish, and support it remain accountable for how that knowledge is discovered, interpreted, and used within ever-changing technological environments.

Metatorial does not prescribe.

Metatorial inventories.

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About the Author

Mirela Roncevic, Ph.D., is a scholarly communication specialist, Open Access (OA) publishing strategist, and researcher with more than twenty-five years of experience spanning publishing, libraries, editorial leadership, and international OA initiatives.

Her work focuses on the intersection of publishing practice, collective funding models for OA publications, institutional decision-making, and the long-term sustainability of OA. Throughout her career, she has worked closely with publishers, libraries, intermediaries, funders, and scholarly communities across Europe and North America, helping organizations navigate the rapidly evolving landscape of scholarly communication, including open science and OA.

In addition to her publishing and research activities, Roncevic has taught, lectured, and spoken extensively on topics related to scholarly communication, digital publishing, OA, and Open Education. She has presented her work in academic, professional, and international settings, contributing to ongoing discussions about the future of publishing, libraries, and knowledge dissemination in an increasingly digital and interconnected world.

Roncevic's research examines collaborative funding models, institutional participation in OA initiatives, and the broader structures that shape how scholarly knowledge is published, disseminated, and sustained over time. She has authored and edited articles, scholarly blog posts, reviews, and books exploring the evolution of publishing in rapidly changing digital environments. She has also published several studies on the sustainability of collective OA funding and the role of libraries within emerging publishing ecosystems.

She holds a Ph.D. in Information Sciences from the University of Zagreb, with a specialization in OA publishing, as well as graduate degrees in literature and the humanities from New York University.

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