



The Paradox of Open Access: Article Processing Charges, Knowledge Inequality, and the Quest for Equitable Scholarly Communication

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Abstract

Purpose – This study examines how Open Access redistributes inequality within scholarly communication, particularly through Article Processing Charges (APCs). It addresses the gap in existing literature that often treats access, publishing participation, and scholarly recognition as separate issues. The study argues that openness should be evaluated not only by whether knowledge is free to read, but also by whether scholars have equitable opportunities to publish and gain recognition.

Design/methods/approach – An integrative literature review was conducted using 52 records identified through Boolean searches on Open Access, APCs, scholarly communication, knowledge inequality, and epistemic justice. After removing duplicates, 49 unique publications were screened and analyzed through thematic synthesis and conceptual coding.

Findings – The findings show that Open Access reduces reader-side barriers but may shift inequality toward authors through APC-based publishing. Financial, geographical, institutional, linguistic, and prestige-related barriers interact across the scholarly communication cycle. The study identifies three interconnected dimensions of Open Access Justice: Access Justice, Participation Justice, and Recognition Justice. It also identifies an inequality cascade through which resource disparities may influence publication opportunities, visibility, recognition, and future academic resources.

Research implications/limitations – The framework provides a basis for evaluating Open Access policies beyond accessibility alone. However, the study is limited by its integrative design and the heterogeneous nature of the reviewed literature, requiring further empirical validation.

Originality/value – The study proposes a multidimensional Open Access Justice framework and conceptualizes inequality as a cumulative process across scholarly communication.

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INTRODUCTION

Open Access has become one of the most significant transformations in contemporary scholarly communication. The movement emerged partly in response to the limitations of subscription-based publishing models that restrict access to scholarly literature through paywalls, particularly for researchers, students, and institutions with limited financial resources. In this context, Open Access is not merely concerned with the technical accessibility of scholarly articles, but also reflects broader aspirations toward the democratization of knowledge, equitable access to research outputs, and wider societal participation in the use of scientific knowledge. Previous studies have shown that expanding open access can improve the availability of scholarly literature, broaden the use of research findings, and reduce access barriers that disproportionately affect resource-constrained institutions and countries (Ford and Alemneh, 2022; Saloojee and Pettifor, 2024; Smith et al., 2017; Strydom et al., 2022).

However, the expansion of Open Access has also generated a new paradox within scholarly communication. One widely adopted model in Open Access publishing requires authors or their affiliated institutions to pay Article Processing Charges (APCs). Although this model enables articles to be freely accessible to readers, it may simultaneously shift the economic burden from the reader side to the author side. In this sense, barriers that previously took the form of *pay-to-read* may be transformed into *pay-to-publish*. Green (2019) questioned the affordability of fee-based Open Access models, while other studies have demonstrated that the ability to pay APCs is unevenly distributed across researchers according to national income level, academic position, disciplinary background, and institutional resources (Segado-Boj et al., 2022). Research focusing on early-career researchers has similarly shown that publication costs may create greater disadvantages for scholars who have not yet secured strong institutional or financial support (Nicholas et al., 2024).

This issue becomes even more significant when Open Access is situated within broader global inequalities in knowledge production. Researchers from low- and middle-income countries and scholars affiliated with under-resourced institutions often have more limited publishing options than those supported by institutional APC funds, transformative agreements, or stronger research infrastructures. Druelinger and Ma (2023) identified disparities in Open Access publishing patterns across national income groups, while Eneh et al. (2025) highlighted the implications of APCs for research output in low-income countries. Cox (2023) further conceptualized this problem through the lens of *testimonial injustice*, arguing that financial barriers to publication may influence whose knowledge is able to enter the global scholarly record. APCs, therefore, should not be understood merely as publication costs, but as a broader issue of justice in participation in knowledge production.

Inequality in scholarly communication does not end with the ability to pay publication fees. Successfully publishing an article does not necessarily guarantee equal levels of visibility, discoverability, citation, or academic recognition. Scholarly communication continues to be shaped by journal prestige, indexing systems, publication language, citation practices, digital visibility, and epistemic legitimacy. MoChridhe (2019), for example, demonstrated how linguistic dominance in scholarly communication can operate as a hidden barrier to equitable participation and academic visibility. Dote Pardo (2025) likewise emphasized that the relationship between Open Access and academic visibility is not straightforward, but is mediated by various factors that determine how research is discovered, used, and cited. At a

more conceptual level, Maliao and Tóthmérész (2026) showed that scholarly visibility may remain conditional when knowledge from particular communities gains recognition only when it aligns with dominant epistemic structures. Thus, openness of access does not automatically result in equality of recognition.

A growing body of literature has examined these issues from different perspectives. Studies on APCs have focused on affordability, authors' willingness and ability to pay, the consequences for researchers in low-income settings, and the commercialization of Open Access publishing (Green, 2019; Ili, 2025; Segado-Boj et al., 2022). Other studies have explored epistemic injustice, linguistic inequality, unequal knowledge production, and the dominance of particular academic structures within global scholarly publishing (Berger, 2021; Knöchelmann, 2021; Meagher, 2021; MoChridhe, 2019). Meanwhile, Diamond Open Access has increasingly been promoted as an alternative model that removes fees for both readers and authors (Peruginelli and Faro, 2024). Nevertheless, this model also faces challenges related to sustainability, infrastructure, professionalization, visibility, and academic recognition, particularly in Global South contexts (Kwanya and Ateka, 2026).

Despite the growing literature on Open Access, APCs, and inequality in scholarly communication, these issues are still frequently examined in isolation. Reader-side access barriers, the inability to pay APCs, geographical and institutional inequalities, linguistic barriers, and disparities in scholarly visibility and recognition are often treated as separate problems. In practice, however, these forms of inequality may be interconnected and may accumulate across the scholarly communication cycle. Limited access to financial and institutional resources, for example, may narrow a researcher's choice of publication venues; constrained publication choices may subsequently affect indexing and visibility; and reduced visibility may influence citation, academic reputation, collaboration opportunities, and future access to research resources. Literature on cumulative advantage in Open Science further suggests that openness does not necessarily eliminate pre-existing inequalities and, under certain conditions, may reinforce advantages already enjoyed by better-resourced actors (Ross-Hellauer et al., 2021).

Building on this gap, the present study proposes the concept of Open Access Justice, comprising three interconnected dimensions: Access Justice, Participation Justice, and Recognition Justice. *Access Justice* refers to equity in obtaining and using scholarly knowledge; *Participation Justice* concerns equitable opportunities to produce and publish knowledge; and *Recognition Justice* addresses equity in the visibility, legitimacy, and academic recognition of published knowledge. This framework is grounded in the premise that a scholarly communication system cannot be regarded as genuinely equitable simply because its published outputs are freely accessible. Justice also requires equitable opportunities to participate in knowledge production and to receive appropriate recognition for scholarly contributions.

Using an integrative literature review, this study examines how Open Access redistributes inequalities within scholarly communication, particularly through APC-based publishing, and how financial, geographical, institutional, linguistic, and structural barriers interact in shaping scholarly participation and recognition. The study also considers the position of alternative models, particularly Diamond Open Access, in addressing these forms of inequality. By shifting the discussion of Open Access from accessibility alone toward

broader questions of justice, this study seeks to offer a conceptual framework for evaluating the extent to which scholarly communication systems provide equitable opportunities to access, produce, publish, and gain recognition for knowledge.

METHOD

This study employed an integrative literature review combined with thematic synthesis to examine inequalities in Open Access scholarly communication, particularly those related to Article Processing Charges (APCs), participation in knowledge production, scholarly visibility, and academic recognition. This approach was selected because the literature includes diverse types of scholarship, such as empirical studies, reviews, bibliometric analyses, conceptual papers, and critical essays.

The literature search was conducted in September 2026 using Boolean combinations of terms related to Open Access, APCs, scholarly communication, knowledge inequality, epistemic justice, the Global South, scholarly visibility, and Diamond Open Access. A representative search string was: (“open access” OR “open access publishing” OR “open scholarly communication”) AND (“article processing charge*” OR APC OR “publication fee*” OR “author fee*”) AND (“knowledge inequality” OR “knowledge justice” OR “epistemic justice” OR “publication inequality” OR equity) AND (“scholarly communication” OR “academic publishing” OR “scholarly publishing”).

The initial search identified 52 records. After removing three duplicates, 49 unique publications remained for title and abstract screening. Studies were included when they substantively addressed at least two of the following areas: Open Access or scholarly communication; APCs or publication barriers; inequality or justice in knowledge production; and scholarly visibility, recognition, linguistic barriers, prestige, indexing, or alternative Open Access models. Publications with only peripheral relevance were excluded from the main analytical corpus.

Data were extracted into an evidence matrix containing publication characteristics, research context, study design, Open Access model, major barriers, forms of inequality, affected actors, and proposed solutions. The studies were then coded according to three higher-order dimensions: Access Justice, referring to equitable access to scholarly knowledge; Participation Justice, referring to equitable opportunities to produce and publish knowledge; and Recognition Justice, referring to equitable visibility, legitimacy, and academic recognition of published knowledge.

Thematic synthesis was used to identify recurring patterns across the literature. Four major themes guided the analysis: the shift from reader-side paywalls to author-side publication barriers; unequal participation in scholarly knowledge production; inequalities in visibility, prestige, and recognition; and the potential and limitations of Diamond and other non-APC Open Access models. These themes were subsequently integrated into the proposed Open Access Justice framework, while also examining how inequalities may accumulate across the scholarly communication cycle.

RESULTS AND DISCUSSION

Characteristics and Emerging Patterns in the Literature

The review identified 52 records, of which three were duplicates, resulting in 49 unique publications for screening. The literature was dominated by journal articles and was concentrated in the most recent years, particularly from 2023 onward. This temporal pattern reflects the growing scholarly concern with the consequences of Open Access publishing models, particularly the expansion of Article Processing Charges (APCs), the increasing commercialization of scholarly publishing, and broader debates concerning equity, epistemic justice, and the participation of scholars from resource-constrained settings.

The reviewed literature was methodologically and conceptually heterogeneous. Some studies empirically examined authors' willingness and ability to pay APCs, publication patterns across national income groups, or the costs associated with specific publishing environments (Drueling and Ma, 2023; Kim and Shrimel, 2023; Segado-Boj et al., 2022). Others critically examined the political economy of Open Access, the commercialization of publishing, epistemic inequality, linguistic exclusion, and the structural position of researchers from the Global South (Berger, 2021; Cox, 2023; Knöchelmann, 2021; Meagher, 2021; MoChridhe, 2019). A further group of studies considered alternatives to APC-based publishing, particularly Diamond Open Access and community-led scholarly communication (Beigel, 2026; Kwanya and Ateka, 2026; Peruginelli and Faro, 2024).

Despite their methodological and conceptual differences, these studies reveal a common pattern: the transition toward Open Access has not eliminated inequality from scholarly communication. Instead, different forms of inequality appear at different stages of the knowledge-production and communication cycle. The thematic synthesis demonstrates that the literature converges around several interconnected concerns, particularly the redistribution of barriers from reading to publishing, unequal participation in knowledge production, disparities in scholarly visibility and recognition, and the possibilities and limitations of non-APC publishing models. These concerns indicate that the question of openness cannot be separated from the broader distribution of resources, opportunities, and academic recognition within the global scholarly communication system.

From Paywalls to Publication Walls: The Redistribution of Inequality

One of the strongest patterns in the literature concerns the transformation of economic barriers within scholarly communication. Traditional subscription-based publishing primarily places the financial burden on readers, libraries, and institutions. Access to research is therefore contingent upon the ability to purchase individual articles, maintain journal subscriptions, or provide institutional access to commercial databases. Open Access emerged partly as a response to this exclusionary structure by enabling scholarly outputs to be accessed without direct payment from readers.

This transformation has produced substantial benefits in terms of accessibility. Studies situated in contexts where access to scholarly literature is particularly constrained emphasize the potential of Open Access to reduce informational disparities and broaden the circulation and utilization of research (Ford and Alemneh, 2022; Saloojee and Pettifor, 2024; Smith et al., 2017; Strydom et al., 2022). From this perspective, Open Access constitutes an important intervention against reader-side inequality because the removal of a paywall substantially expands the potential audience for scholarly work. Students, researchers, professionals,

policymakers, and members of the public who lack access to expensive subscription databases may gain direct access to research that would otherwise remain inaccessible.

However, the reviewed literature consistently demonstrates that removing reader-side charges does not necessarily eliminate the underlying economic barrier. In APC-based Gold Open Access, the financial responsibility associated with publication may instead be transferred to authors or their institutions. Green (2019) questioned the affordability of this model and argued that publication charges can create a new barrier to participation. Segado-Boj et al. (2022) similarly found that researchers' willingness and capacity to pay APCs vary according to national income level, academic position, disciplinary background, age, and previous Open Access experience. These findings demonstrate that financial ability becomes relevant not merely to the consumption of research but also to the capacity to contribute research to the scholarly record.

The shift toward APC-funded Open Access can therefore be interpreted as a redistribution of exclusion from *pay-to-read* to *pay-to-publish*. Under a subscription model, inequality is experienced primarily by readers and institutions that cannot afford access, whereas under an author-pays model, inequality may increasingly be experienced by researchers who lack the financial or institutional support required to publish in particular Open Access venues. The system may consequently appear open at the point of consumption while remaining selective at the point of production. This distinction challenges the assumption that the removal of a reader paywall is sufficient to demonstrate that a publishing system has become equitable.

Acharjee and Acharjee (2024) capture this contradiction by questioning whether APC-based Open Access genuinely democratizes knowledge or instead creates new forms of gatekeeping. Frank et al. (2023) similarly highlight the tension between the egalitarian aspirations of Open Access and the practical consequences of models that depend heavily on payments from authors. Together, these critiques suggest that the central question is no longer simply whether Open Access expands readership, because its ability to do so is well established. A more pressing question concerns whether the financial architecture used to sustain openness distributes opportunities to publish in an equitable manner.

The significance of this distinction becomes particularly evident when publication costs are situated within the uneven distribution of research funding. Researchers affiliated with wealthy institutions may have access to dedicated APC funds, institutional agreements with publishers, project-based publication budgets, national research funding, or other forms of financial support. Researchers located in less-resourced institutions may lack comparable mechanisms. Consequently, two researchers whose manuscripts possess comparable scholarly quality may face substantially different possibilities when selecting publication venues. The difference may result not from intellectual quality but from the resources available within their respective institutional environments.

The literature therefore suggests that Open Access should not be evaluated solely according to the accessibility of its final outputs. It should also be assessed according to the conditions under which those outputs are produced. A publishing system can successfully remove the reader paywall while simultaneously constructing a new form of publication wall for authors who lack sufficient financial support. From this perspective, the paradox of Open

Access lies not in the failure of openness itself, but in the possibility that an intervention designed to democratize access may redistribute rather than eliminate structural inequality.

Article Processing Charges and Unequal Participation in Knowledge Production

The second major theme concerns participation in knowledge production. APCs are not merely a financial issue because their effects intersect with existing inequalities in institutional resources, geographical location, career stage, disciplinary funding, and research infrastructure. These intersecting conditions influence who can participate effectively in scholarly publishing, the journals available to them, and the conditions under which their research enters the global scholarly record.

Druelinger and Ma (2023), in their analysis of Open Access publication trends by national income level, demonstrate that participation in Open Access publishing is unevenly distributed. Their findings reinforce the argument that differences in national economic resources are reflected within the global publishing system. Eneh et al. (2025) similarly draw attention to the implications of APCs for research output in low-income countries, particularly where limited or declining research funding intersects with rising publication costs. The financial demands of publishing therefore do not operate in isolation from the broader political economy of knowledge production.

The problem is consequently broader than an individual author's inability to pay a particular publication fee. APC affordability is embedded within institutional and national research ecosystems. Scholars working in institutions with limited research budgets may face considerable disadvantages even when their countries are not formally categorized as low-income. Conversely, researchers affiliated with highly funded universities may be largely insulated from APC costs because payments are covered through institutional arrangements or research grants. Publishing inequality therefore cannot be reduced to a simple binary distinction between the Global North and Global South, although global economic inequalities remain a significant dimension of the problem.

Career stage provides another example of how financial barriers interact with existing academic inequalities. Nicholas et al. (2024) show that early-career researchers experience particular challenges in relation to Open Access publishing costs. Scholars at the beginning of their careers often have weaker access to independent research grants, less discretionary funding, and limited authority within their institutions to negotiate publication support. An APC that may be relatively manageable for a senior academic leading a well-funded project may therefore represent a substantial obstacle for a doctoral graduate, postdoctoral researcher, or junior faculty member. Publication costs can consequently reinforce inequalities that already exist within academic career structures.

These differences demonstrate the distinction between formal openness and substantive participation. A journal may formally permit every researcher to submit a manuscript, but meaningful participation depends on whether authors possess the financial, institutional, linguistic, and professional resources necessary to navigate the publication process. Equal permission to participate does not necessarily produce an equal capacity to participate. In this context, scholarly openness must be assessed not only in terms of formal availability but also in terms of the actual conditions that enable researchers to become contributors to the scholarly record.

Cox (2023) extends the discussion beyond economic inequality by conceptualizing APCs through the notion of *testimonial injustice*. When the ability to disseminate scholarly testimony depends partly on the capacity to finance publication, financial barriers may influence which voices become part of the recognized scholarly record and which remain underrepresented. APCs can therefore shape not only individual publication opportunities but also the composition of global knowledge itself. If particular communities, regions, or institutional settings are systematically disadvantaged in scholarly publishing, the resulting literature may disproportionately reflect the experiences and priorities of actors with greater publishing resources.

This issue is especially important because scholarly publishing is not a neutral distribution mechanism. Publication represents one of the principal pathways through which research becomes discoverable, citable, discussable, and institutionally legitimate. Restricting the ability of certain researchers to participate can therefore influence which research problems, geographical experiences, methodological traditions, and forms of knowledge receive international attention. Inequality in publishing opportunity may eventually become inequality in the intellectual composition of scholarly fields.

The reviewed literature therefore supports the concept of Participation Justice. Participation Justice refers not merely to a formal right to submit a manuscript but to the existence of meaningful and equitable opportunities to produce and publish scholarly knowledge. These opportunities are conditioned by APC affordability, research funding, institutional support, national research infrastructure, career position, linguistic resources, and access to established publishing networks. Participation Justice consequently shifts the discussion from whether journals are technically open to authors toward whether researchers possess comparable capabilities to participate in the knowledge-production system.

Participation Inequality as a Multidimensional Problem

The reviewed studies further demonstrate that participation inequality is inherently multidimensional. Financial inequality is its most visible manifestation, but publication opportunities are simultaneously shaped by geographical, institutional, career-related, disciplinary, and linguistic inequalities. These forms of disadvantage rarely operate independently; instead, they can overlap and reinforce one another.

Geographical inequality influences access to research infrastructure, grant funding, institutional subscriptions, international academic networks, and publication support. Researchers working in low- and middle-income countries may encounter the combined effects of limited research budgets and publication charges denominated in stronger foreign currencies. Consequently, an APC that appears moderate within the financial structure of a high-income research institution may constitute a substantial portion of the research budget available to scholars elsewhere. Geographical location therefore influences the practical meaning of publication cost.

Institutional inequality further shapes the range of publishing options available to researchers. Well-resourced universities can subsidize APCs, negotiate transformative agreements with major publishers, provide professional language editing, maintain research support offices, and assist academics in navigating publication requirements. Smaller universities, teaching-oriented institutions, independent research centers, and institutions in resource-constrained settings may provide far fewer forms of support. The capacity of

individual scholars to participate in Open Access publishing is therefore partially determined by the institutional environments in which they work.

Career inequality intersects with these institutional differences. Early-career researchers frequently face intense pressure to establish publication records while possessing fewer resources to cover publication expenses or negotiate institutional support (Nicholas et al., 2024). Senior researchers may also benefit from established networks, accumulated research funding, and greater familiarity with journal systems. Differences in career position can therefore translate into unequal capacities to benefit from publishing opportunities even when journals formally apply the same procedures to all contributors.

Disciplinary inequality also deserves consideration because publication funding varies considerably across academic fields. Research areas supported by large laboratory grants or external funding may be better positioned to incorporate publication costs into research budgets, whereas fields characterized by individual scholarship, smaller grants, or limited external funding may find equivalent APCs considerably more burdensome. A uniform author-pays model can therefore generate different practical consequences across disciplines.

Linguistic inequality adds another layer to this structure. MoChridhe (2019) characterizes linguistic dominance as a form of hidden paywall because researchers who do not work primarily in internationally dominant academic languages may incur additional costs related to translation, professional editing, or language correction. The challenge is not merely financial. Authors may also need to adapt concepts, rhetorical styles, and locally embedded intellectual traditions to publication conventions designed around dominant linguistic and epistemic communities. Language therefore influences both the ability to enter scholarly publishing and the way knowledge is represented within it.

These dimensions demonstrate why APCs should not be treated as an isolated variable. A researcher may simultaneously work at a resource-constrained institution, lack external research funding, belong to a poorly funded discipline, be at an early career stage, and write in a second or third language. The cumulative interaction of these conditions may produce a much greater disadvantage than any single factor considered independently. Participation Justice must therefore account for the combined effects of different structural barriers when assessing the equity of scholarly communication.

Beyond Publication: Visibility, Discoverability, and Recognition

A third major finding of the review is that obtaining access to publication does not automatically produce equality in scholarly recognition. Much of the Open Access debate has understandably focused on whether research can be accessed or whether authors can afford to publish. However, the reviewed literature increasingly demonstrates that important inequalities persist after publication, particularly in relation to discoverability, visibility, citation, prestige, and epistemic recognition.

Dote Pardo (2025), through a systematic review of the relationship between Open Access and academic visibility, demonstrates that open availability can increase opportunities for research exposure, but its effects are mediated by citation practices, disciplinary characteristics, indexing systems, and other mechanisms of discoverability. Open availability therefore increases the possibility that research will be encountered, but it does not guarantee equivalent levels of scholarly attention. The visibility advantage associated with Open Access

depends partly on the wider infrastructures through which research is searched, indexed, recommended, cited, and evaluated.

The distinction between accessibility and recognition is consequently crucial. An article can be freely available online but remain difficult to discover when its journal is poorly indexed, has weak metadata, has limited international visibility, or is insufficiently integrated into major academic discovery systems. Similarly, a publication appearing in a locally oriented Open Access journal may possess substantial scholarly and societal relevance but generate less academic capital than a comparable publication in a highly prestigious internationally indexed journal. Both articles may be equally open to readers while occupying substantially different positions within systems of academic recognition.

Language further complicates this relationship. MoChridhe (2019) demonstrates that the dominance of English within global scholarly communication creates additional barriers to equitable participation. The same linguistic hierarchy can shape recognition after publication. Research published in nationally or regionally significant languages may be highly relevant to local scholarly and professional communities while receiving limited visibility within international indexing and citation systems. Conversely, researchers seeking international visibility may feel compelled to publish in English or adapt their scholarship to Anglophone academic conventions, potentially affecting how locally embedded concepts and experiences are represented.

The problem consequently extends beyond linguistic accessibility to the deeper question of epistemic recognition. Maliao and Tóthmérész (2026) draw attention to conditional visibility, whereby research originating from particular communities or geographical settings may receive greater recognition when it aligns with dominant epistemic priorities and established scholarly expectations. The issue is therefore not simply whether knowledge enters the publishing system but the conditions under which that knowledge becomes recognizable as authoritative, relevant, and worthy of citation within dominant scholarly communities.

Knöchelmann (2021) similarly challenges the assumption that Open Access automatically democratizes knowledge. Removing technical restrictions on reading does not necessarily dismantle entrenched hierarchies of prestige, legitimacy, language, disciplinary authority, and institutional reputation. Existing structures can continue to shape which journals are regarded as prestigious, which topics attract international attention, which methodologies are recognized as legitimate, and which scholarly communities exert disproportionate influence over global research agendas.

These findings provide the basis for the concept of Recognition Justice, which refers to equitable opportunities for scholarly contributions to become discoverable, visible, cited, valued, and epistemically legitimate. Recognition Justice moves the analysis beyond the opportunity to publish by examining what happens after a contribution enters the scholarly communication system. While Participation Justice concerns whether researchers have meaningful opportunities to contribute and publish knowledge, Recognition Justice concerns whether those contributions subsequently receive equitable opportunities for visibility, credibility, scholarly use, and academic recognition. The underlying issue is therefore not simply whether knowledge has been published, but whose published knowledge ultimately acquires authority and value within the academic system.

Open Access Does Not Automatically Produce Epistemic Equality

The distinction between openness, participation, and recognition reveals a broader conceptual limitation within conventional assessments of Open Access. Open Access is often operationalized as a characteristic of the published object: an article can either be accessed freely or remains behind a financial or technical barrier. Justice, however, concerns the wider social and institutional system through which scholarly knowledge is produced, communicated, evaluated, and recognized.

An article can therefore be technically open while the system surrounding its production and recognition remains unequal. Researchers may publish without imposing a paywall on readers while still experiencing unequal access to publication funding, restricted choices of publication venues, linguistic disadvantages, limited indexing, weak discoverability, lower citation visibility, prestige hierarchies, and institutional evaluation systems that assign greater value to some journals or publishing infrastructures than to others. These inequalities demonstrate that the openness of an individual article cannot by itself provide a complete measure of the equity of scholarly communication.

The reviewed literature consequently supports an understanding of openness as a multidimensional condition rather than a binary publication status. Pinfield (2024), for example, argues that achieving global Open Access requires attention not only to openness of research outputs but also to scientific, epistemic, and participatory dimensions of openness. This broader perspective is consistent with the synthesis developed in the present review because it recognizes that the accessibility of an article and the fairness of the scholarly system in which it circulates are analytically related but not identical.

A justice-oriented understanding of Open Access therefore requires examination of the entire scholarly communication cycle. It must account for who can access research, who can participate in producing and publishing it, how different publishing infrastructures distribute visibility, and whose contributions are ultimately treated as legitimate and influential knowledge. From this perspective, Open Access represents an important but incomplete component of a wider project of knowledge justice.

Diamond Open Access as an Alternative to APC-Based Publishing

Diamond Open Access represents one of the most significant alternatives to APC-based publishing identified in the literature. Under this model, neither readers nor authors pay direct publication fees. Publishing costs are instead supported through universities, scholarly associations, research institutions, public funding, consortia, or other forms of collective infrastructure. Diamond Open Access therefore directly challenges the assumption that scholarly communication must be financed either through reader subscriptions or through payments from authors.

Peruginelli and Faro (2024) describe Diamond Open Access as a potentially viable and more inclusive approach to scholarly communication because it avoids financial barriers on both sides of the publication process. Within the framework developed in this review, its principal advantage lies in its potential to improve both Access Justice and Participation Justice simultaneously. Readers can access published scholarship without payment, while authors can contribute without being required to finance publication through APCs.

Kumari and A (2025) further demonstrate the importance of comparing Gold and Diamond Open Access in relation to researchers' perceptions, publication costs, accessibility,

and institutional support. Such comparisons reinforce the argument that publication models do not merely determine how readers access research; they also influence how opportunities to participate in scholarly publishing are distributed among researchers with different levels of institutional and financial support.

Nevertheless, Diamond Open Access should not be treated as an automatically equitable solution. Kwanya and Ateka (2026), in their examination of Diamond Open Access in Africa, emphasize its potential for supporting knowledge equity and community-driven publishing while simultaneously identifying persistent structural challenges related to sustainability. Diamond journals may depend heavily on institutional subsidies, volunteer labor, limited technical infrastructure, or uncertain long-term financial arrangements. Their ability to eliminate author charges therefore does not mean that the broader conditions required for sustainable and visible scholarly publishing are automatically secured.

Beigel (2026) similarly raises questions concerning quality standards, institutional recognition, and the future development of Diamond publishing. If Diamond journals remain under-resourced, poorly indexed, weakly integrated into international discovery systems, or undervalued within research assessment structures, the removal of APCs may address financial participation barriers without resolving inequalities in visibility and recognition. This is particularly relevant in academic systems where promotion, research funding, and institutional reputation remain strongly associated with publication in established commercial journals or internationally recognized citation indexes.

The comparison between APC-based and Diamond models consequently reveals an important distinction between financial openness and epistemic equality. A journal may be free for both readers and authors and yet remain marginal within global systems of scholarly prestige. Diamond Open Access can therefore substantially reduce particular forms of exclusion without automatically eliminating the hierarchies through which scholarly contributions become visible and valued. Fee-free publishing should thus be understood as an important condition for certain forms of equity, but not as a sufficient condition for comprehensive knowledge justice.

The literature suggests that alternative Open Access models require supportive infrastructures beyond the elimination of publication fees. Sustainable financing, professional editorial capacity, robust digital infrastructure, effective metadata, international and regional indexing, discoverability, multilingual publishing, preservation systems, and recognition within research evaluation policies are all necessary if Diamond and other community-oriented models are to provide a comprehensive alternative to commercially dominated scholarly communication. The challenge is therefore not merely to make publishing free but to ensure that non-commercial scholarly infrastructures are sustainable, discoverable, credible, and institutionally valued.

Bibliodiversity, Community-Led Publishing, and the Global South

Another important pattern in the reviewed literature concerns the position of the Global South. Discussions of APC inequality frequently portray researchers and institutions in resource-constrained regions primarily as disadvantaged participants within a publishing system structured elsewhere. Although this inequality is well documented, such a perspective risks obscuring the role of the Global South as a source of alternative publishing practices, infrastructures, and epistemic traditions.

Berger (2021) positions bibliodiversity as a central principle for decolonizing Open Access. Rather than assuming that a single commercial, linguistic, technological, or organizational model should define global scholarly communication, bibliodiversity emphasizes pluralism in publication languages, infrastructures, organizational structures, financing mechanisms, editorial traditions, and forms of knowledge. This perspective shifts the objective from simply integrating marginalized researchers into dominant publishing structures toward creating a scholarly communication environment capable of sustaining multiple knowledge ecosystems.

Such an approach is particularly important because scholarly equity cannot be achieved merely by improving access to established commercial platforms. Community-led and institutionally supported publishing infrastructures in different regions demonstrate that scholarly communication can be organized according to non-commercial and public-interest principles. The significance of these initiatives lies not only in their ability to eliminate or reduce publication costs but also in their potential to preserve regional research agendas, multilingual scholarship, local intellectual traditions, and forms of knowledge that might be marginalized within highly standardized global publishing systems.

The work of Debat et al. on the ways in which the Global South is reshaping scholarly communication reinforces this more active interpretation. Institutions and scholarly communities in the Global South are not simply seeking greater participation within dominant publication systems; they are also developing models that challenge conventional assumptions about commercial ownership, publication financing, language, infrastructure, and scholarly prestige. This shift is significant because it reframes knowledge equity as a question of institutional agency and publishing sovereignty rather than solely as a problem of access to existing systems.

This perspective also has implications for policy. Responses to APC inequality frequently emphasize waiver programs or publication discounts for authors in particular countries. Although such mechanisms can provide immediate relief, they leave the fundamental author-pays logic largely unchanged and place publishers in the position of determining who qualifies for exemption. More structural interventions may involve investment in publicly funded scholarly infrastructures, university and library publishing, scholarly society platforms, institutional and disciplinary repositories (Muid et al., 2026), Diamond Open Access, cooperative publishing arrangements, and multilingual knowledge systems. Such initiatives can move the debate from compensating disadvantaged participants toward restructuring the conditions under which scholarly communication operates.

The Open Access Justice Framework

The thematic synthesis indicates that Open Access should be conceptualized not only as a question of accessibility but as a broader question of justice. Based on the reviewed literature, this study proposes Open Access Justice as a multidimensional framework consisting of Access Justice, Participation Justice, and Recognition Justice. These three dimensions represent different but interconnected stages through which inequality can enter scholarly communication.

Access Justice concerns the equitable ability to obtain, read, use, and potentially reuse scholarly knowledge. Its principal barriers include subscription fees, paywalls, unequal institutional access to databases, and other restrictions that limit the availability of scholarly

literature. Traditional Open Access initiatives have addressed this dimension most directly by removing financial barriers faced by readers.

Participation Justice concerns equitable opportunities to contribute to the production and publication of scholarly knowledge. It encompasses the ability of researchers to conduct, prepare, submit, and publish their work without being disproportionately constrained by APCs, inadequate research funding, institutional inequality, geographical disparities, career-stage disadvantages, or linguistic barriers. Participation Justice therefore recognizes that scholarly communication cannot be considered genuinely open when the ability to contribute is strongly dependent on resources unrelated to the intellectual quality of the research.

Recognition Justice concerns whether published knowledge receives equitable opportunities for visibility, discoverability, legitimacy, scholarly use, and academic recognition. Its barriers include unequal indexing, journal prestige hierarchies, citation structures, language dominance, epistemic marginalization, and research evaluation systems that privilege certain forms of publication over others. Recognition Justice therefore extends beyond publication itself by asking whether different forms of scholarship have comparable opportunities to become part of the recognized and influential scholarly record.

The three dimensions are analytically distinguishable but functionally interconnected. Improvements in one dimension do not automatically produce improvements in the others. Gold Open Access, for example, may substantially improve Access Justice because readers encounter no paywall, while Participation Justice remains constrained where authors cannot afford APCs. Diamond Open Access can strengthen both Access Justice and Participation Justice by eliminating direct fees for readers and authors, yet Recognition Justice may remain limited when Diamond journals experience weaker indexing, visibility, prestige, or institutional recognition.

This multidimensional perspective challenges the assumption that openness can be evaluated solely according to whether a publication is freely accessible. A more comprehensive assessment requires attention to how access, participation, and recognition are distributed throughout scholarly communication. Open Access Justice therefore shifts the analytical unit from the accessibility status of an individual article toward the fairness of the scholarly ecosystem within which knowledge is produced, communicated, and recognized.

The Inequality Cascade in Scholarly Communication

The relationship among Access Justice, Participation Justice, and Recognition Justice also reveals a dynamic pattern in which scholarly inequalities may accumulate across successive stages of the communication cycle. This study conceptualizes that pattern as an inequality cascade. Rather than viewing financial, institutional, linguistic, visibility, and recognition inequalities as isolated problems, the inequality cascade emphasizes the possibility that disadvantages experienced at one stage can shape opportunities at subsequent stages.

A researcher beginning with limited institutional or financial resources, for example, may have fewer publication venues available because certain APCs are unaffordable. Restricted publication choices may lead the researcher toward journals with lower visibility or weaker indexing within dominant scholarly databases. Lower discoverability can subsequently affect readership and citation, while limited citation and prestige can influence academic recognition, professional advancement, collaboration opportunities, and competitiveness for

future research funding. In this way, resource inequality can become participation inequality, which can then become inequality in publication opportunity, visibility, recognition, and eventually access to future academic resources.

The significance of this process lies in its cumulative character. Scholarly inequality is not necessarily a static disadvantage that appears at only one moment in publication. A structural disadvantage experienced early in the scholarly communication cycle can create consequences that extend well beyond the initial barrier. Conversely, scholars and institutions with greater initial resources may have greater freedom to choose prestigious publishing outlets, achieve stronger visibility, accumulate citations and reputation, and subsequently gain further funding and collaborative opportunities. The scholarly communication system can therefore participate in the reproduction of cumulative advantage.

This interpretation is consistent with broader discussions of cumulative advantage in Open Science. Ross-Hellauer et al. show that openness can function within academic systems in which already advantaged actors possess greater capacities to exploit newly available opportunities. Policies that expand openness without addressing unequal starting conditions can therefore produce uneven benefits. The same logic applies to Open Access. Removing a barrier does not necessarily equalize the resources that scholars possess to benefit from the resulting opportunity.

The inequality cascade also helps explain why isolated interventions, such as APC waivers, may provide only partial solutions. A waiver can allow a researcher to overcome a publication fee in a particular instance, but it does not necessarily resolve linguistic disadvantage, limited research infrastructure, journal prestige hierarchies, indexing disparities, citation inequality, or unequal access to future funding. Effective responses to knowledge inequality therefore require interventions across multiple stages of scholarly communication rather than concentrating solely on the price of publication.

Reconsidering What It Means for Scholarly Communication to Be Open

Taken together, the reviewed literature suggests that the meaning of “open” in scholarly communication requires reconsideration. When openness is defined narrowly as free access to published outputs, the success of Open Access can be evaluated largely through the removal of reader paywalls. Such a definition captures an important achievement of the movement but does not fully address how opportunities and recognition are distributed throughout scholarly communication.

A broader conception of openness requires scholarly knowledge to be accessible without unreasonable barriers, while also ensuring that researchers have meaningful opportunities to participate in knowledge production and publication regardless of economic or institutional position. In addition, the knowledge produced through such participation should have equitable opportunities to become visible, discoverable, valued, and recognized. These conditions correspond respectively to Access Justice, Participation Justice, and Recognition Justice, and together they provide a more comprehensive standard for evaluating the equity of scholarly communication.

This broader perspective changes the central analytical concern from whether an individual article is technically open to whether the scholarly communication system in which that article is produced and circulated is just. Such a distinction shifts the debate away from a narrow technical definition of Open Access toward questions concerning the social

organization of knowledge, the distribution of publishing resources, and the structures through which scholarly value is produced.

Within this perspective, APCs remain an important and highly visible manifestation of inequality, but they are not the entirety of the problem. The broader challenge involves constructing scholarly communication systems in which access to knowledge, participation in knowledge production, and recognition of scholarly contributions are distributed more equitably. Financial reform alone cannot address the full range of inequalities produced through language, indexing, prestige, institutional capacity, disciplinary norms, and epistemic hierarchies.

The central implication of this review is therefore that free access should be regarded as a necessary but insufficient condition for knowledge justice. Open Access can fulfill its democratizing promise only when the openness of scholarly outputs is accompanied by equitable conditions for producing, publishing, disseminating, discovering, and recognizing knowledge. The question facing scholarly communication is consequently no longer limited to how knowledge can be made open, but extends to how the entire system through which knowledge is created and valued can become more just.

CONCLUSION

This study demonstrates that the expansion of Open Access has not eliminated inequality from scholarly communication; rather, it has redistributed and transformed the locations at which inequality occurs. While Open Access substantially reduces reader-side barriers by removing paywalls, APC-based publishing may create new barriers for authors, particularly those working in resource-constrained institutions, low- and middle-income countries, underfunded disciplines, and early-career positions. The findings further show that inequality does not end once publication is achieved. Differences in language, indexing, discoverability, journal prestige, citation structures, and epistemic legitimacy continue to shape whose knowledge becomes visible and academically recognized.

To capture these interconnected dimensions, this study proposes the concept of Open Access Justice, comprising Access Justice, Participation Justice, and Recognition Justice. Access Justice concerns equitable opportunities to obtain and use scholarly knowledge, Participation Justice concerns equitable opportunities to produce and publish it, and Recognition Justice concerns equitable opportunities for published knowledge to become visible, valued, and recognized. The study also introduces the notion of an inequality cascade, highlighting how disparities in financial and institutional resources can affect publication opportunities, scholarly visibility, academic recognition, and subsequent access to research resources. In this sense, inequality in scholarly communication should be understood as cumulative rather than as a set of isolated barriers.

The analysis also indicates that Diamond Open Access and other non-APC models offer important alternatives to author-pays publishing by reducing financial barriers for both readers and authors. However, fee-free publishing alone does not guarantee comprehensive knowledge justice. Sustainable infrastructure, professional editorial support, multilingualism, indexing, discoverability, institutional recognition, and long-term funding remain necessary to ensure that alternative publishing models can achieve not only openness of access but also equity in participation and recognition.

These findings carry important implications for libraries, universities, funders, journals, publishers, and research policymakers. Open Access policies should not be evaluated solely by the proportion of freely accessible publications, but also by the extent to which they reduce structural barriers across the scholarly communication cycle. Greater attention should therefore be directed toward sustainable non-APC publishing infrastructures, equitable publication funding, multilingual scholarly communication, inclusive indexing practices, and research evaluation systems that recognize diverse publishing venues and knowledge traditions.

This study is limited by its reliance on an integrative review of a heterogeneous body of literature and by the availability of bibliographic and abstract-level information for some records. The proposed Open Access Justice framework and inequality cascade are therefore conceptual syntheses that require further empirical validation across different disciplines, geographical regions, publishing systems, and institutional contexts. Future research could test these dimensions quantitatively, compare APC-based and non-APC publishing ecosystems, and examine how access, participation, and recognition inequalities operate across specific national and disciplinary settings. Ultimately, Open Access can fulfill its democratizing promise only when openness is understood not merely as free access to published knowledge, but as the equitable distribution of opportunities to access, produce, disseminate, and gain recognition for scholarly knowledge.

DECLARATION OF AI AND AI ASSISTED TECHNOLOGIES IN THE WRITING PROCESS

In the preparation of this manuscript, the authors utilized ChatGPT (OpenAI) to assist with language editing, improving readability, refining academic expression, organizing the presentation of arguments, and improving the clarity of the manuscript. All AI-assisted outputs were critically reviewed, verified, and revised by the authors, who assume full responsibility for the accuracy, originality, integrity, analysis, and final content of the publication.

AUTHOR CONTRIBUTION STATEMENT

Muhamad Abdul Muid: Conceptualization, methodology, literature search, data curation, thematic analysis, framework development, and writing – original draft. **Muhammad Khoirul Umam:** Literature screening, formal analysis, validation, interpretation of findings, and writing – review & editing. **Barlian Fajri:** Literature screening, conceptual analysis, validation, visualization of the conceptual framework, and writing – review & editing. All authors reviewed and approved the final version of the manuscript.

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No new primary empirical dataset was generated in this study. The evidence base consists of scholarly publications identified and analyzed through the integrative literature review. The bibliographic sources supporting the findings are publicly available through the publications cited in the manuscript. The review coding and evidence matrix may be made available by the corresponding author upon reasonable request.

DECLARATION OF INTERESTS

The authors declare that they have no known financial, personal, professional, or other competing interests that could have influenced the research reported in this manuscript.

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