01. About Copim Compass

Copim Compass is an online information hub developed by Copim's Open Book Futures project (2023-2026).

- Introduction: A guide of guides
  - Copim Compass. A guide
  - Navigate the Copim Compass
- Using the Opening the Future toolkit: An introduction to the resource
- Acknowledgements
- License
- Keep in touch!

Introduction: A guide of guides

Find out more about the Copim Compass.

Copim Compass. A guide

This toolkit is the output of one of Copim's Open Book Futures project deliverables: **to establish a knowledge base to provide comprehensive resources on alternative funding models and modes of publishing, acquiring and archiving open access books, alongside new training and guidance on archiving and preservation best practice.**

The aim was to:

- Develop resources for stakeholders
- Consolidate existing resources
- Promote business models best practice
- Showcase project work on metadata, experimental publishing and archiving

By providing a comprehensive tool suite of resources we will accelerate outreach to libraries, publishers, academics and the wider public, to advocate for, advise on and encourage open access publishing and initiatives. Scroll down for the table of contents.

Expand to read more background on why & how we developed this resource

In the course of our scoping research and gap analysis, we discovered that a great many resources, guidelines, and toolkits have been developed in the last few years, many of which are regularly maintained and updated, and that many others are currently under development. We therefore developed **Copim Compass** with the following aims:

1. That a valuable exercise would be in collating these existing resources, categorising them, and providing a central signposting location for external resources; aiming to complement rather than re-develop.
2. One of the major existing lacunae we identified was one which was well within our project competency: a resource on transitioning publishers from closed to open access.
3. An opportunity to provide a project wide resource for all areas of Copim's Open Book Futures project to use.

The Copim Compass is, therefore, a resource of several parts. The first sections feature success stories from author, library and press perspectives and contain the collated external resources on OA for books more generally; the middle sections detail the Opening the Future revenue model, tools and experiences at Copim on transitioning publishers from closed to open access, and the final sections introduce the different components of the Open Book Futures project,

and act as gateways to their resources.

Table of Contents

1 About Copim Compass

Introduction to Copim Compass: Background to the toolkit, how and why we developed the resource, acknowledgements and license information.

2 Open Access Book Publishing: A Comprehensive Overview of Resources

Collates and summarises a number of existing resources that provide insights about how to start and/or run an Open Access publisher, covering different areas of the publishing workflow. As far as possible, we have aimed to include non-UK and non-Anglophone resources to make it as broadly useful a resource as possible.

3 Author Success Stories

Collates **open access author stories**, to indicate the viability of OA publishing and the positive experiences that authors have with the process. These are generally produced by individual publishers and hosted on their own pages, so we felt that collating them could be widely valuable as a resource to support OA publishing.

4 Library Success Stories

Collates **library success stories.** We felt that it would be valuable to **collate evidence from libraries trying to direct their funding to OA**; demonstrating the processes this entailed internally, and the perceived value of doing so.

5 Publisher Success Stories

A collection of **inspiring success stories from publishers** around the world who have embraced OA for books and achieved meaningful results.

6 Opening the Future

Opening the Future: Introduction and Description. Background of, and context for, this particular model, as well as why we believe that collective funding is equitable and sustainable for publishers, authors, and libraries.

Describes the model in detail and explains how it differs from other similar models. **It also provides some direct feedback from those who have already implemented the model**.

7 Opening the Future

Opening the Future: Financial Modelling. Provides the detailed financial modelling spreadsheets and other tools that our participating presses have used, in order for you to make your own calculations.

8 Opening the Future

Opening the Future: Workflows, Partners & Marketing. Provides information about the relevant workflows for using Opening the Future, including details of **relevant third party services, licence templates, and a lengthy FAQ** that we have built up over several years of outreach and troubleshooting to **authors, libraries, and publishers.**

9 Open Book Accessibility

This book contains a knowledge base, guidance and planning models that will support small diamond open access publishers to improve their accessibility.

10 Open Book Collective

The **Open Book Collective** (OBC) are a UK registered charity (charity number: 1206287) that brings together publishers, publishing service providers, and scholarly libraries to secure the diversity and financial futures of open access book production and dissemination.

Provides information about the OBC and signposting to a number of resources beyond Copim Compass.

11 Thoth Open Metadata

Thoth Open Metadata is a non-profit UK community interest company (CIC) providing innovative metadata management and distribution solutions tailored to tackle the multiple issues faced by

publishers of getting open access works into the book supply chain, ensuring their long-term sustainability and accessibility.

Provides information about Thoth and signposting to software and services.

12 Archiving and Preservation

The **Archiving and Preservation** work package works to provide guidance and easy to use tools to help small open access presses archive and preserve their books and associated content.

Find out more, including the Thoth Open Archiving Network (TOAN).

13 Experimental Publishing Compendium

The **Experimental Publishing Group** are researching ways to more closely align existing software, tools and technologies, workflows and infrastructures for experimental publishing with the workflows of open access book publishers.

Provides information about the Experimental Publishing Group and signposting to tools, practices and books.

Navigate the Copim Compass

There are different ways to navigate the Copim Compass. It is divided into sections - or 'Books' as it is termed in the Compass - which are ordered numerically. You can browse all the books via the Copim Compass homepage, which you can also access by clicking the title at the top of any page.

One route is to begin with 02. Open Access Book Publishing: A Comprehensive Overview of Resources which provides signposting to resources and organisations that provide insights about how to start and/or run an Open Access publisher, covering different areas of the publishing workflow. Additionally, there is a search bar at the top of the page which you can use to search for key terms/organisations etc. that are of interest to you.

Another route is to browse Copim Compass by the different Open Book Futures project groups. Each group is its own 'Book' within the Copim Compass (apart from Opening the Future, which has three!). In each book, users will find an overview of the group, key outputs and contact details.

While Copim Compass is primarily aimed at publishers, we know that it will be useful to authors and libraries. So you can also browse case studies and success stories from the different audience group perspective.

Using the Opening the Future toolkit: An introduction to the resource

This toolkit sets out how we implemented the Opening the Future model, including the documentation of challenges, resources, timetables, and activities, from initial set up to renewals. It is intended as a roadmap for other presses that wish to implement an 'Opening the Future'-esque model.

In case you skipped over the previous section, a guide of guides, here is a breakdown of the next three books which focus on the Opening the Future model:

- **Introduction and description:** This section gives the background of, and context for, this particular model. It describes the model in detail and explains how it differs from other similar models. It also provides some direct feedback from those who have already implemented the model.
- **Financial modelling:** this section provides the detailed financial modelling spreadsheets and other tools that our participating presses have used, in order for you to make your own calculations.
- **Workflows and partners:** this section provides information about the relevant workflows for using Opening the Future, including details of relevant third party services, licence templates, and a lengthy FAQ that we have built up over several years of outreach and troubleshooting to authors, libraries, and publishers.

Some of the pages are quite long as we felt that a certain level of detail would be useful. Where this is the case, we begin the page with an executive summary that gives you the key points.

Acknowledgements

The development of this guide was led by Kira Hopkins and Anna Hughes, with additional input from Tom Grady. The authors would like to thank the following individuals who contributed to the creation, reviewing and editing of this guide: Lucy Barnes, Simon Bowie, Joe Deville, Jordy Findanis, Jo Fitzpatrick, Claire McGann, Kevin Sanders and Toby Steiner.

The Toolkit uses Bookstack for its structure. Bookstack is Open Source software, in line with the values of the Copim community.

The guide is an output of the Copim Open Book Futures project, which was funded from 2023 to 2026 by the Research England Development Fund and Arcadia.

The section on Opening the Future builds on the report, 'Opening the Future: How to Implement an Equitable Revenue Model for Open Access Monographs. We are grateful to the authors Martin Eve, Frances Pinter, Emily Poznanski and Tom Grady for this work.

License

This toolkit is licensed under a Creative Commons Attribution 4.0 International license (CC BY 4.0).

Bookstack, the platform used to run the Toolkit, is used under an MIT license.

Keep in touch!

The guide was first published in February 2025.

However, we recognise that publishing changes, Open Access changes. We therefore welcome any and all comments on the content included in the Copim Compass. Any observations can be sent directly to info@copim.ac.uk or using the Contact Details in the individual Books.

You can also leave comments directly on the text by marking up sections using hypothes.is. All are welcome; we hope you find Copim Compass of use!

-- The Copim Compass team