02. Open Access Book Publishing: A Comprehensive Overview of Resources

In many ways the open access (OA) books landscape has exploded in the last few years, with increasing numbers of OA initiatives, open infrastructures, policies, best practice guidelines, explanatory guides, how-to toolkits for OA publishing, and many more. Even for those who try to stay in the know, it can be overwhelming!

At Copim, therefore, we have tried to create a ‘guide of guides’, so to speak. This 'guide of guides' has been made within the following parameters: resources included were made specifically in support of OA, that they related to long-form publication, and that they provided guidance and information that was broadly applicable, rather than, e.g. being the guidelines for an individual publisher (except where they have been adopted more widely as a standard in lieu of more generic resources). We have collated, categorised, and described these existing resources, which are summarised in the sections below.

Please note that many of these resources can be found in more than one section, where we felt they were relevant to multiple subject headings.

We acknowledge that our collection here, while expansive, is undoubtedly biased in language and region, as the two principle creators of this ‘guide of guides’ are UK-based. However, we have tried

to mitigate this to an extent by seeking input to our list of resources from the US, EU, Middle East and Africa.

We welcome feedback from Copim Compass users regarding any key resources you believe are missing. Please reach out to us at info@copim.ac.uk. Your input is invaluable in helping us improve this resource for everyone!

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    - Copim WP7 Report on Archiving and Preserving Open Access Monographs
    - Guidance on managing copyright under UKRI open access policy
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- Dissemination: Metadata, Archiving, Platforms
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- Country-Specific Guides
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- Glossaries and Knowledge Bases
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    - Knowledge Bases

- Toolkits
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    - COPIM's toolkit for running an Opening the Future programme at an academic press
    - DIAMAS Best Practices checklist for Diamond OA publishers
    - European University Association: The new university Open Access checklist
    - Experimental Publishing Compendium
    - Focused Toolkit for Journal Editors and Publishers: Building Diversity, Equity, Inclusion, and Accessibility in Editorial Roles and Peer Review (C4DISC)
    - New University Press toolkit
    - OAPEN: OA books toolkit
    - Open Book Collective toolkit
    - Scholarly Communication Toolkit: Open Access Policies & Publishing toolkit
    - SCURL EDI Network: EDI toolkit
    - Toolkit to foster Open Access Agreements for Smaller Independent Publishers (cOAlitionS)
    - University of London Press launch a new Open Access in the Humanities online training course
    - Library Publishing: How to Launch, Enhance, and Sustain Your Program (ALA)

Introduction: What will I find here?

In this section, you will find a myriad of resources to support OA book publishing ranging from blog posts to practical experiences. This includes **toolkits, websites sign-posting to resources, directories and case studies.**

The resources are grouped in what we hope is a logical order! But users can also dip in and out to the sections they are most interested in. Resources may be found in multiple sections if they cover more than one topic. 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.

We hope there is something for everyone, whatever stage of their journey users are at. And while Copim Compass is primarily aimed at publishers, we know that it will also be useful to authors and libraries.

This Book lists all the resources we found as part of our Open Book Futures InfoHub scoping report, which included an overview of existing assets and guidance for OA book publishing, a gap analysis, and our initial recommendations to scope the direction and final format of Copim Compass.

Reports on the Open Access Landscape

This section includes reports on the current OA landscape in the UK and further afield.

Publishing Open Access

This section contains a variety of resources including reports and toolkits about the processes of OA publishing. It is divided into two sections: 'born-OA' publishing, where the publisher has only ever published OA books/journals, and transitioning to open, which has resources for traditional publishers aiming to move into OA. Where the resources relate to both, they are in both sections.

Testimonies and Case Studies

This section signposts to other parts of the Copim Compass that collate case studies about OA publishing success from the perspective of various stakeholders: authors, libraries, and publishers.

Business Models

This section provides links to information about OA business models. These largely focus on the different types available, how they work, their pros and cons, and some other relevant information about funding such as UKRI's OA policy and implementation of OA book funding. Other resources, such as Open policy finder (Jisc) and the Open Book Environment, collate publisher policies around OA and BPC costs.

Dissemination: Metadata, Archiving, Platforms

This section provides some standards, reporting, and service providers for OA book metadata and archiving.

Standards: Accessibility, Equity, Diversity

This section contains guidance on accessibility standards, and then on EDIB guidelines within scholarly publishing. Copim Open Book Futures is producing its own resource on Accessibility in OA books; this will be launching later in 2025 and will also be part of the Copim Compass.

Legalities: Contracts and Copyright

This section provides resources on OA contracts and on copyright; both third-party copyright in OA book, and the copyright requirements of the UK funding body.

Useful Organisations, Projects and Platforms

This section includes organisations, projects and platforms / tools relevant to OA book publishing.

Country-specific Guides

This section contains guidelines, reports and other resources, across a broad range of subjects, which pertain to specific geographic areas. These are roughly divided into the UK, the ERA, and the rest of the world. The compilers of this resource acknowledge unreservedly that the disproportionate weighting given to the UK and the ERA are a reflection of our own experience, despite some attempts to mitigate this.

Glossaries and Knowledge Bases

This section gathers together two broad types of informational resources. The first is glossaries, providing definitions of OA terms and translations into other languages; the second is a range of, compendiums of information about OA, policy finders, and some others.

Toolkits

This section contains toolkits already available which cover different aspects of open access. As such, they are thematically very varied. There is a lot of discussion about what actually constitutes

a toolkit, its aim and purpose but for simplicity's sake, we have kept it to self-identified toolkits, and or tools/guides that provide highly practical guidance to implement.

This 'guide of guides' has been made within the following parameters: resources included were made specifically in support of OA, that they related to long-form publication, and that they provided guidance and information that was broadly applicable, rather than, e.g. being the guidelines for an individual publisher (except where they have been adopted more widely as a standard in lieu of more generic resources).

We know that as the OA landscape develops, new resources are constantly coming online. Additionally, we acknowledge that our collection here, while expansive, is undoubtedly biased in language and region, as the two principle creators of this ‘guide of guides’ are UK-based. However, we have tried to mitigate this to an extent by seeking input to our list of resources from the US, EU, Middle East and Africa.

If you know of any other resources that would be suitable for this overview of resources, please email us: info@copim.ac.uk

Reports on the Open Access landscape

This section includes reports on the current OA landscape in the UK and further afield.

We acknowledge that as the Copim Open Book Futures is primarily a UK-based project, we are working with a highly UK and Anglophone-focussed perspective. So while we have endeavoured to make sure that we include relevant resources from around the world, we are aware that we are likely to have missed many, particularly those that are not in English.

Collaboration in Diamond Open Access publishing

The opportunities and benefits of collaboration within Diamond OA publishing are evident on individual, regional, national and global levels. Expanding beyond the confines of individual efforts offers significant benefits for enhancing publishing efficiency, quality, and impact. This approach also paves the way for fostering more productive collaborative opportunities in the future. In its effort to strengthen the Diamond OA archipelago and ensure its future financial sustainability, the DIAMAS project has aimed to identify current collaboration patterns at various levels, the obstacles hindering such collaborations, and potential new methods for publishers and service providers to work together.

This study from the DIAMAS project is based on a review of DIAMAS web survey responses, DIAMAS-led consultations with different stakeholder groups through public webinars and events, and six dedicated focus groups held with institutional publishers from across Europe in multiple languages, and a bibliometric investigation into Diamond OA journals and publishers.

Read the study

Reports on the Open Access landscape

Copim WP7 Report on Archiving and Preserving Open Access Monographs

A report on the Copim project's knowledge and recommendation on archiving and preservation. It provides guidance for smaller, scholar-led presses on metadata, archiving and preservation, on repositories, and on the Thoth Archiving Network.

Read the report

Guidance on managing copyright under UKRI open access policy

UKRI's report from 2023 provides guidance and explanations on third party copyright in the UK context when dealing with open access. It is aimed at researchers (and research organisations), who are seeking clarity on copyright for their open access publications.

Read the report

Landscape of no-fee open access publishing in Africa

A landscape study from EIFL on Diamond OA journals in Africa which provides detailed reports for several countries and thorough general conclusions about the state of Diamond OA journals in the region, their current challenges, and suggestions for the future. It also provides the survey data which provides a large amount of granular data.

Read the report

Landscape report on scholarly publishing in Ireland

This report maps scholarly publishing on the island of Ireland. It documents publishers on the island and assesses the readiness of Irish scholarly publishers to transition to open access publishing. It also examines their knowledge of the practices, needs, challenges and opportunities of Diamond Open Access.

Read the full report on Zenodo

Open Book Futures InfoHub scoping report

This scoping report was the first step in the process of establishing a ‘knowledge base’ (or equivalent) 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. Establishing a ‘knowledge base’ is is one of the deliverables of Copim's Open Book Futures project.

Drawing on the myriad of resources we know to already exist (produced within and outside the project), the scoping report presents an overview of existing assets and guidance for OA book publishing, a gap analysis, and our initial recommendations for the OBF working group to consider, all of which were used to scope the direction and final format of the ‘knowledge base’ AKA Compass Compass.

It is also a useful way to quickly search across all the resources we researched and collated using the Ctl+F shortcut.

Download and search the report

PALOMERA Recommendations for Open Access Academic Book Policies

The PALOMERA project, which ended in early 2025, aimed to ensure academic books and monographs are not neglected in Open Science and Open Access policies. One of the main project outputs was a Knowledge Base of relevant funder policies from within the European Research Area (ERA).

Subsequently, PALOMERA also created a set of actionable guidelines to support and coordinate funder and institutional policies for OA books, with the goal of speeding up the transition to OA for books in particular.

Reports on the Open Access landscape

Report from a workshop on sustainable open access book publishing in East Africa

In October 2024, a collaborative online-session for publishers from East Africa was co-organised by the Directory of Open Access Books (DOAB), OAPEN, the Open Access Scholarly Publishing Association (OASPA) and French research institutes in Africa, Les Afriques dans le monde (LAM) and the French Institute for Research in Africa (IFRA), supported by the National Centre for Scientific Research in France (CNRS). The session covered approaches towards equitable and sustainable open access for scholarly books.

Read the report

Supporting learned society, subject association, and smaller specialist publishers to transition to open access book publishing

This report, the result of a collaboration between UKRI, ALPSP, the British Academy, OASPA and Information Power, was published in 2025.

It was produced in the context of the UKRI OA policy change in 2024 that longform publications of UKRI-funded research were to be published open access. It seeks to understand the challenges faced by smaller, specialist publishers of business models, scale, and other issues as they seek to implement open access.

Among its many conclusions and recommendations, it notes the tension between OA models being largely reliant on library support, while libraries find it difficult to turn their budgets to supporting OA books. They also note that without improvement in the supply chain (especially at the discoverability stage) it will be hard for smaller publishers to work without support from larger publishing partners. Additionally, new open infrastructure will be needed.

This report contains a lot of detailed information about OA publishing pain points and supply chains, and also contains data such as librarian survey results about OA support, and case studies of publishers impacted.

Read the report

TOME Report: The Cost to Publish TOME Monographs

A study of the costs incurred by US university presses in publishing scholarly monographs as part of the TOME pilot project. It is very focussed on US institutional publishing, with extremely high costs that do not necessarily map onto those in the UK and elsewhere.

Read the report

Reports on the Open Access landscape

TOME Stakeholder Value Assessment: Final Report

The concluding report about the author experiences with the TOME project, and more general conclusions about how the groundwork with authors and universities would need to be built on by any subsequent projects.

Read the report

Generative AI in Diamond Open Access Publishing (EIFL)

This short report, released in late 2025 by EIFL, outlines some of the emerging opportunities and issues arising from the growth of generative AI around editorial workflows, metadata, authorship, research integrity, copyright and others. It provides very brief and clear summaries of these issues, along with links to external resources such as guides and courses for those seeking further clarification and guidance. While this resource is focussed on journals, we felt it was important to include because, as has happened with other guidelines in the past (e.g. research ethics) it seems like to us that guidance and policy innovated for journals will be adopted and adapted for books.

See report here

Publishing Open Access

This section contains a variety of resources including reports and toolkits about the processes of OA publishing. It is divided into two sections:

1. 'Born-OA' publishing, where the publisher has only ever published OA books/journals
2. Transitioning to open, which has resources for traditional publishers aiming to move into OA

Where the resources relate to both, they are included in both sections.

Born Open Access

How to Start an Open Access Journal: 2024 Small Publisher Primer

The Primer is a guide for those working with a scholarly society or institution to launch an OA journal in-house. It is a comprehensive resource for journals to flip to OA.

Read the Primer

Jisc New University Press toolkit

An online guide supporting and giving guidance to new university presses and library-led publishing ventures. It is a trusted and valued resource.

Read the guide

Language Science Press

Language Science Press is a born-digital scholar-led open access publisher in linguistics so a good example of what can be achieved.

Read their collaborative 'Cookbook'

The book is available for collaborative reading online. Readers can directly annotate the text there, raise questions, make comments or share personal experiences. Source code is also freely available. It doesn't claim to be written by experts but is complemented by the business model, open business data, and a spreadsheet for drafting and calculating own business models.

Open Book Collective toolkit

The Open Book Collective (OBC) toolkit is for small, scholar-led OA publishers who are either setting up a press or seeking to improve its operations. It covers a broad range of aspects about setting up a press and building one up logistically and reputationally. It also provides

case studies.

Access the toolkit

Find out more about the OBC

OPERAS Pathfinder

A publication service finder from Operas for editorial managers, editors and authors at any stage of a publication project. This version of the Pathfinder has been implemented as part of OPERAS-PLUS, a project funded by the European Commission under Grant Agreement No. 101079608.

Pathfinder works as a catalogue where scholarly communication services are offered, mainly by OPERAS members e.g. OBC, Thoth but possibly from other providers as well, to researchers acting as editors and editorial managers to support their work and improve its quality. Authors can also use the Pathfinder to receive suggestions for publishing the results of their research.

Find out more

How to transition / flip to Open Access

Cookbook for Open Access books

This book describes the experiences of setting up a community-based publisher, Language Science Press. It discusses the main principles of community-based publishing and gives a very granular breakdown of the different tasks. The discussion of the different tasks is complemented by readings, time lines, and a list of time sinks. This book is complemented by the business model , open business data, and a spreadsheet for drafting and calculating own business models.

Read the book

COPIM's toolkit for running an Opening the Future programme at an academic press

This document sets out how Copim implemented the OtF model, including the documentation of challenges, resources, timetables, and activities. It is intended as a roadmap for other presses that wish to implement an 'Opening the Future'-esque model. It is the only toolkit dedicated to flipping book publishing from closed to open (although the Information Power report due in December will likely render this incorrect). It is now slightly out of date as many of these funding models have developed greatly since 2020. It is also not currently very user-friendly and has not been widely adopted.

See: https://copim.pubpub.org/pub/copim-toolkit-for-running-an-opening-the-future-programme/release/3 or https://zenodo.org/records/7003979

It has now been superseded by Books 6 , 7 and 8 of Copim Compass.

How to Begin the OA Transition: a guide for smaller and specialist publishers

This guide, the result of a collaboration between UKRI, ALPSP, the British Academy, OASPA and Information Power, was published in 2025. It provides advice and tools for learned societies and other smaller specialist publishers seeking strategies and business models for transitioning to OA as well as guidance on advocating for OA to necessary stakeholders such as board members, potential pain or clarification points for any commercial publishing partners the smaller publisher may have, and a detailed guide to different available revenue models. It also provides practical guidance on licences, metadata, archiving, and tracking title performance.

Read the guide

How to Start an Open Access Journal: 2024 Small Publisher Primer

The Primer is a guide from Scholastica for those working with a scholarly society or institution to launch an OA journal in-house. A comprehensive resource for journals to flip to OA and might be useful background reading.

Read the Primer

How to flip your journal: A guide to more equitable publishing with Diamond Open Access

This guide, an output of the Strengthening Diamond OA in the Netherlands project, is a comprehensive guide to the rationale and logistics of flipping a journal to Diamond OA; what routes are available, how they work, the financial aspect, and case studies for implementation. While it is speaking primarily to the Dutch context, the suggestions are more widely applicable.

Read the guide

OPERAS Pathfinder

A publication service finder hosted by Operas for editorial managers, editors and authors at any stage of a publication project. Although a useful resource as it caters for different stakeholder groups, it is currently in beta so not fully developed.

Discover Pathfinder

Small Publishers and the Transition to Open Access

The Knowledge Exchange (KE) and and the German Centre for Higher Education Research and Science Studies (DZHW) published an initial landscape study of small journal publishers. This study includes a practical examination of small publishers which helps the research community to identify the challenges they may face in successfully transitioning to open access. The supplementary data forms the basis of the report. It demonstrates the data that has been used to examine the publishers.

Read the key findings

KE has commissioned a further study from Information Power to identify and analyse the challenges — both real and perceived — small publishers face when transitioning to open access publishing and to explore the pathways that these publishers consider and adopt in making the transition.

Supporting learned society, subject association, and smaller specialist publishers to transition to open access book publishing

This report, the result of a collaboration between UKRI, ALPSP, the British Academy, OASPA and Information Power, was published in 2025. It was produced in the context of the UKRI policy change in 2024 that longform publications of UKRI-funded research were to be published open access. It seeks to understand the challenges faced by smaller, specialist publishers of business models, scale, and other issues as they seek to implement open access.

Among its many conclusions and recommendations, it notes the tension between OA models being largely reliant on library support, while libraries find it difficult to turn their budgets to supporting OA books. They also note that without improvement in the supply chain (especially at the discoverability stage) it will be hard for smaller publishers to work without support from larger publishing partners. Additionally, new open infrastructure will be needed.

This report contains a lot of detailed information about OA publishing pain points and supply chains, and also contains data such as librarian survey results about OA support, and case studies of publishers impacted.

Read the report

TOME: The Cost to Publish TOME Monographs

A study of the costs incurred by US university presses in publishing scholarly monographs as part of the TOME pilot project. While it is very focussed on US institutional publishing, with

extremely high costs that do not necessarily map onto those in the UK and elsewhere, we still consider it a highly relevant resource.

Read the guide

TOME Stakeholder Value Assessment: Final Report

A concluding report about the author experiences with TOME, and more general conclusions about how the groundwork with authors and universities would need to be built on by any subsequent projects, and relevant to the proposed section of the InfoHub on flipping to OA.

Read the report

Testimonies and Case Studies

This section signposts to other parts of the Copim Compass, as well as more general advice from OA publishers about the benefits of publishing books OA:

- Author Success Stories
- Library Success Stories
- Publisher Success Stories

Please do get in touch if you know of any other Success Stories that can be added to these sections.

Why publish a book Open Access?

Berlin University Publishing | Should I publish my book open access?

Berlin Universities Press share the benefits of publishing a book open access.

Bristol University Press | Why publish open access?

Bristol University Press share the benefits of publishing a book open access, including:

- Making your work available to everyone
- Going beyond disciplinary boundaries
- Greater impact

Business models

This section provides links to information about OA business models. These largely focus on the different types available, how they work, their pros and cons, and some other relevant information about funding such as UKRI's OA policy and implementation of OA book funding. Other resources, such as Jisc's Open policy finder (formerly know as the Sherpa suite of resources) and the Open Book Environment, collate publisher policies around OA and BPC costs.

While our focus remains on OA books in particular, we have included a couple of more journal-focussed resources where they take a holistic view of a publisher rather than focus solely on their journal output.

Business models

An introduction to UKRI’s fund for longform outputs

This is a guide for UKRI-funded authors on how to use the UKRI research fund to make their longform works immediately available open access (mandatory since early 2024).

It sets out the available funding limits for BPCs, CPCs and for OA subscription funds. It also sets out the application process.

Read the guide

Business Models for Open Access Books

This collection of case studies was brought together by Lucy Barnes of Open Book Publishers and François van Schalkwyk of African Minds.

It showcases the business models of a range of open access (OA) academic book presses, and is intended to document the diverse ways that presses in different parts of the world have set up and now maintain their open access operations.

While the case studies are extremely detailed, they have not been updated since 2022 and are therefore a little out of date. However, they still help to illustrate the reasons behind the choices made by the presses, as well as detailing the models themselves.

Access the collection

Business models

Classifying open access business models

This opinion piece by Tasha Mellins-Cohen (founder at Mellins-Cohen Consulting and Executive Director at COUNTER Metrics) is an article offering a comprehensive classification system for OA models, categorising them into five core types, each with distinct characteristics and implications for funding, equity, and implementation:

- Transactional
- Bundled
- Cooperative
- Sponsored
- Alternative

This classification aims to clarify the myriad labels and terminologies used, addressing the inconsistencies and gaps in previous attempts to categorize OA models. By providing descriptions and analyses of different business models, the article seeks to enhance transparency around and understanding of OA options, ultimately supporting informed decision-making in the evolving landscape of academic publishing.

Read the article on Zenodo

Business models

Consider your options: explore the different funding streams for Diamond Open Access

This guide (an output from the DIAMAS project) lists different funding streams for Diamond OA publishing and service provision. It also appears as part of the toolsuite of sustainability resources on the European Diamond Capacity Hub (ECDH).

While it is mostly focussed on journals, there are elements of it relevant to books. It goes through a range of models, some of which are only relevant to journals (e.g. subscriptions to print copies) and some of which are more broadly applicable (e.g. collective supporter programmes), describes each model, sets out who the funder is and what exactly is funded, and provides examples. It gives pros and cons for each model. In our opinion, the pros and cons provided are realistic and reasonable.

Read and download

Business models

Cookbook for Open Access books

This book describes the experiences of setting up a community-based publisher, Language Science Press.

It discusses the main principles of community-based publishing and gives a very granular breakdown of the different tasks. The discussion of the different tasks is complemented by readings, time lines, and a list of time sinks.

The book is also complemented by the business model, open business data, and a spreadsheet for drafting and calculating own business models.

Download and read

Business models

Open Book Environment (OBE) Dashboard

Open Book Environment (OBE) Dashboard is a joint initiative from the Universities of Derby and Vermont, designed as a response to the myriad challenges faced by the scholarly community at large. It is a transparency dashboard about publishers, aimed at authors (and their funders) focussing on author fees, licensing, their policies on self-archiving, waiver and discount information, and any stated price justification.

OBE is intended to help reduce researcher burden and to bring about more transparency around open book publishing practices. It also aims to fill a gap by providing information on a range of different publishers categorized by how transparent the information is on OA books on their websites relating to pricing for BPCs, clarity on editorial quality, retrospective OA options, fee waivers and more.

Although a recent resource (2023), its longevity is unclear because it is a Google sheet maintained by two volunteer contributors (Publication Practice Librarian, Holly Limbert, University of Derby and Library Associate Professor Dan DeSanto, University of Vermont). However, OBE is designed to be a living resource and inventory which will grow. Amendments and additions can be suggested by submitting a request via this form.

Use the dashboard

Business models

Open policy finder (Jisc)

'Open Access for Books' is a new addition to Jisc’s well established Sherpa toolsuite of resources for journals. Now known as open policy finder, the Open Access for Books feature offers an overview of publishers' book policies to help authors and research organisations make informed and confident decisions in open access publishing and meeting funders' guidelines.

Developed to support the UKRI OA policy for longform, it is still relatively new (released in beta early 2024) and a limited number of publisher data sets included. It has since moved to live release and is under active development with the number of publisher policies increasing.

Try the new tool

Business models

Plan S: New tool to assess equity in scholarly communication models

This online assessment tool, launched in 2024, enables self-assessment of financial models by funders, publishers and others about access to read, access to publish (with or without fee), reuse rights, fee transparency, and promoting open data and code, and preprints and open peer review.

While this is, at least currently, explicitly for journals, and implicitly more relevant to STEM subjects (e.g. open code) much of it is applicable to books and to AHSS subjects.

Try the tool

Business models

Toolkit to foster Open Access Agreements for Smaller Independent Publishers (cOAlition S)

The toolkit was developed by Information Power, working together with librarians, publishers and library consortia in the framework of the third phase of the Society Publishers Accelerating Open Access (SPA OPS 3.0) project, commissioned by cOAlitionS and the Association of Learned and Professional Society Publishers (ALPSP).

It provides concise guidance, example licences and data templates for smaller publishers to use while negotiating agreements with libraries. While it is journal-focussed, there is a complementary Information Power report which focuses on books.

Access the toolkit

Dissemination: Metadata, Archiving, Platforms

This section provides some standards, reporting, and service providers for OA book metadata and archiving.

Dissemination: Metadata, Archiving, Platforms

Copim WP7 Report on Archiving and Preserving Open Access Monographs

A report on the Copim Project's knowledge and recommendation on archiving and preservation. It provides guidance for smaller, scholar-led presses on metadata, archiving and preservation, on repositories, and on the Thoth Archiving Network.

Access the report

Dissemination: Metadata, Archiving, Platforms

DIAMAS Best Practices checklist for Diamond OA publishers

This self-assessment checklist from the DIAMAS project is for publishers of Diamond OA books and journals. It provides guidelines for best practice in several areas (e.g. governance, funding, editorial integrity) and provides suggestions for improvement. It also provides external links for more information to support these guidelines.

See the checklist

Dissemination: Metadata, Archiving, Platforms

OPERAS Metrics

OPERAS, referenced elsewhere on Copim Compass in different capacities, offers metrics about the usage and impact of OA books, providing consolidated usage data for the publisher’s website but also other sites where the book is available.

View the service

Dissemination: Metadata, Archiving, Platforms

Thoth

Thoth is a non-profit, open metadata management and dissemination platform whose recent whose successful outreach campaign has enabled revenue targets to be met.

Visit their website

Thoth integrates into third party platforms, and these collaborations enable seamless access to Thoth's metadata management and distribution capabilities across diverse scholarly platforms.

Access their github

Standards: Accessibility, Equity, Diversity

This section contains guidance on accessibility standards, and then on Equity, Diversity, Inclusion, and Belonging (EDIB) guidelines within scholarly publishing.

Copim Open Book Futures Accessibility group is producing its own resource on Accessibility in OA books; this will be available on Copim Compass soon.

Accessibility

Copim Open Book Futures is producing its own resource on Accessibility in OA books; this will be launching later in 2025.

Manchester University Press Alt Text Guidelines

This resource provides clear guidelines for creating alt text for images in books in order to make them more accessible. It also links to other guidance, such as from United Nations Publications.

View the guidelines

Equity & Diversity

C4DISC - A Focused Toolkit for Journal Editors and Publishers: Building Diversity, Equity, Inclusion, and Accessibility in Editorial Roles and Peer Review

The toolkit is focused on building representation among peer reviewers and fostering equity in the actions of peer reviewers. It is also dedicated to building DEIA into core aspects of the wider editorial endeavor. While it has detailed, and in places, useful, guidance, and is very new (published May 2024) the majority of the advice is only relevant to very large and well-funded outfits with robust reporting tools, mostly with a focus on journals. It also mentions open access as a facet of equity, but suggests using transformative agreements.

View the toolkit

Equity, Diversity, Inclusion and Belonging (EDIB) in scholarly communication - working with communities to develop resources for multilingualism, gender equity and accessible and inclusive websites

This report from the DIAMAS project describes the project results, additional literature review, and collaborative process to develop the DIAMAS toolkits and guidelines related to Equity, Diversity, Inclusion and Belonging (EDIB). The focus of this report is on the topics of multilingualism, gender equity, and accessible and inclusive websites as key dimensions of EDIB, which is the seventh core component of the Diamond OA Standard (DOAS) (Consortium of the DIAMAS project, 2024). The report builds on the work summarized in the D3.1 IPSP Best Practices Quality evaluation criteria, best practices, and assessment systems for Institutional Publishing Service Providers (IPSPs) (Ševkušić & Kuchma, 2023).

The main activity for T4.6 is to develop toolkits and guidelines to help IPSPs to manage and increase the availability of multilingual content, to address language and gender biases in their operations, and to develop more accessible and inclusive websites, content and metadata. Rather than generating original information, the goal was to survey, analyse, curate and repackage existing work in this area. This report explains the collaborative process used to identify such materials and to develop the DIAMAS toolkits and guidelines related to EDIB.

Read the report

Plan S: New tool to assess equity in scholarly communication models

This online assessment tool, launched in 2024, enables self-assessment of financial models by funders, publishers and others about access to read, access to publish (with or without fee), reuse rights, fee transparency, and promoting open data and code, and preprints and open peer review. While this is, at least currently, explicitly for journals, and implicitly more relevant to STEM subjects (e.g. open code) much of it is applicable to books and to AHSS subjects.

View the tool

SCURL EDI Network: EDI toolkit

This toolkit from the SCURL EDI Network aims to support member libraries in embedding good practice consistently across services. It is comprehensive and useful and comes at the topic from several angles - that of evaluating EDI in the workplace and recruitment, but also from policy and how to support students in the library.

The plan is to annually evaluate and update it, and the resource is very recent (from 2023). It covers the topic from a library POV but has more widely applicable sections (e.g. on hiring policies). Good toolkit - but specifically library (and UK)-focussed so does not fulfill the publisher's perspective need - overall a very good resource for EDI in libraries.

View the toolkit

Legalities: Contracts and Copyright

This section provides resources on OA contracts and on copyright; both third-party copyright in OA book, and the copyright requirements of the UK funding body.

Contracts in Publishing

Contracts in Publishing: A toolkit for authors and publishers

Is it focused on journals or books? Does it matter? A comprehensive resource and not like anything else on the market (that we've been able to find).

View the toolkit

Copyright

Creative Commons

Creative Commons is an American non-profit organization and international network devoted to educational access and expanding the range of creative works available for others to build upon legally and to share.

Learn more

From Permission to Publication: Managing Third Party Materials in Open Access Books (OABN & UoL webinar)

This webinar, from late 2024, was given by the OABN and University of London Press and featured speakers on the subject of third party copyright, from the perspective of authors, publishers, copyright experts, and GLAM sector representatives.

Watch the webinar

Guidance on managing copyright under UKRI open access policy

This report by UKRI (2023) provides guidance and explanations on third party copyright in the UK context when dealing with open access. It is aimed at researchers (and research organisations). who are seeking clarity on copyright for their open access publications.

Read the report

Publishing under the UKRI open access policy: copyright and Creative Commons licences

This guide, written by Jisc, provides guidance on the UKRI open access policy as it pertains to copyright; both third party permissions for open access work, but also on authors' copyright and moral rights when they publish OA, the different licences available to them, and copyright exceptions. It covers both books and journals.

View the guide

Useful organisations, projects and platforms

This section includes organisations, projects and platforms / tools relevant to OA book publishing.

Organisations

AG Universitätsverlage (University Press Association)

AG Universitätsverlage brings together publishers from Germany, Austria, Switzerland, and South Tyrol; its aim is to support publishers in representing their interests externally and to promote the exchange of experiences. The publishers affiliated to the AG primarily publish academic publications from their own institutions.

Find out more

Association of European University Presses (AEUP)

The AEUP is an organisation of and for university presses across Europe to help them build stronger relationships between them, to co-operate and share knowledge in order to reach common goals and to jointly address important issues in publishing. It is a strong collective group.

Find out more

Association of Learned and Professional Society Publishers (ALPSP)

The Association of Learned and Professional Society Publishers is an association of non-profit, scholarly publishers. Among others, they represent the interests of society publishers and other small, specialist presses. They provide webinars, training and other resources on a range of subjects including open access, and have been stakeholders in recent reports, linked elsewhere on Copim Compass, about OA and society publishing.

Find out more

Association of University Presses (AUP)

AUP is a membership organisation of non-profit scholarly publishers, publishing to high editorial and professional standards. It is a strong collective group.

Find out more

Copim Open Book Futures

Copim is a community of people, organisations, and infrastructures working towards equitable and sustainable open access for scholarly books. It takes a community-led and values-driven approach to these. It is also, from 2023-2026, a Research England and Arcadia-funded research project into this topic. It consists of numerous work packages about equitable OA funding, experimental publishing forms, metadata and archiving for OA books, and other topics.

Find out more

Forum for Open Research in MENA

FORM (Forum for Open Research in MENA) is a non-profit membership organisation to advance open science and open access throughout the Arab world, providing a platform for stakeholders to exchange insights and experiences about policy development and implementation.

Find out more

Irish Open Access Publishers (IOAP)

IOAP is a community of practice for Irish open access publishers that promotes engagement with the Diamond Open Access publishing model (free to publish and free to read).

Find out more

Invest in Open Infrastructure (IOI)

IOI (Invest in Open Infrastructure) is an organisation that seeks to collate and platform open infrastructures, with the aim to to drive informed, strategic, and coordinated investment in and adoption of open infrastructure. Among its tools are the Infra Finder, which helps would-be adoptees of open infrastructure to find the right solutions.

Find out more

JSTOR Open Access

The open access portal for JSTOR, a large scale platform and aggregator for (largely HSS) books, journals, images and primary sources. It could be used as an example of where the reader could look for content.

Find out more

Library Publishing Coalition (LPC)

The LPC is an independent, community-led membership association of academic and research libraries and library consortia engaged in scholarly publishing. Their website features a range of useful materials. It is a strong collective group.

Find out more

New University Presses (NUPs) in The Netherlands

A consortium of Diamond OA publishers in the Netherlands which aims to advance scholarly publishing.

Find out more

OAPEN/Directory of Open Access Books

The OAPEN Foundation is a non-profit dedicated to open access, peer reviewed books, hosting their central repository, the OAPEN Toolkit, and also the Directory of Open Access Books (DOAB).

It aims to increase visibility and retrievability of high-quality OA publications and promote OA book publishing. It provides crucial services for a number of stakeholder groups, including PRISM: Peer Review Information Service for Monographs. This is a standardised way for publishers to display information about their peer review processes, aiming to provide transparency about publishing and thus build trust in the quality of OA books.

Find out more

Open Access Australasia

Open Access Australasia advocates for and supports practical initiatives on open access in Australia and Aotearoa New Zealand. It is a large community, with several written resources, groups, directories, and others.

Find out more

Open Access Books Network (OABN)

A shared community space / network for those interested in all things OA books, non judgemental, informal and open to all stakeholder groups. It also has its own FAQs, blog posts and other information. A great space for passionate conversations around OA books, it should be supported!

Find out more

Of particular interest may be:

Open Access Books Network: 'Mythbusters' video series

A video series by OABN to dispel key myths around OA books that may put prospective authors off. These address often-asked questions in an approachable and helpful way, and the answers are provided by relevant external partners including OA authors.

The videos are available here

Open Access Books Network: Around the World with the OABN

A series of blog posts which focus on OA books in a different country around the world, highlighting their regional experiences, problems and successes. This is an ongoing series that is still being updated, and unlike many OA resources provides (emic) perspectives from beyond the ERA.

Access the blog posts

Open Access Scholarly Publishing Association (OASPA)

OASPA is a diverse community of organisations engaged in open scholarship with a mission to encourage and enable open access as the predominant model of communication for scholarly outputs. OASPA encourage and enable open access as the predominant model of

communication for scholarly output.

Find out more

Open access tracking project

An interesting community project and a good source of information e.g. tracking, collating and sharing on social media.

Find out more

OPERAS Metrics

OPERAS, referenced elsewhere in Copim Compass in different capacities, offers metrics about the usage and impact of OA books, providing consolidated usage data for the publisher's website but also other sites where the book is available.

Find out more

Open Access Institutional Publishers (OIPA)

The Open Institutional Publishing Association (OIPA) was founded to connect and encourage open access publishing within the UK. Their mission is to create a new source of support and advocacy for established and emerging university presses and institutionally-affiliated publishing operations striving for open access.

Their website contains a list of useful resources which they have plans to expand as per member needs. Although relatively limited it is a reliable resource and probably the go to for UK-based IPs.

Find out more

The Publishers Learning and Community Exchange (PLACE)

A helpful forum offering information on publishing processes and standards, developed by a coalition of Committee on Publication Ethics (COPE), Crossref, the Directory of Open Access Journals (DOAJ) and the Open Access Scholarly Publishers Association (OASPA). Currently

journals-focused.

Find out more

Project Muse

A large scale platform (and aggregator) focusing on humanities output, not uniquely OA content, could be used as an e.g. of where the reader could look for content.

Find out more

SciELO

SciELO (Scientific Electronic Library Online) is an index and database of books and journals, which hosts several OA titles. It focuses on articles from Latin America and South Africa, in Spanish, Portuguese, and English. These are largely scientific titles.

Find out more

SPARC Europe

SPARC Europe is a Dutch foundation advocating for open access, open science, open scholarship and open education within Europe. They collaborate with numerous European stakeholders to attempt to shape policy maximising the access and reuse of research and educational resources.

Find out more

Thoth

Thoth is a non-profit, open metadata management and dissemination platform whose active and successful outreach campaign has enabled revenue targets to be met. Thoth integrates into third party platforms, these collaborations enable seamless access to Thoth's metadata management and distribution capabilities across diverse scholarly platforms.

Find out more

View their github

Ulibros

Ulibros is the platform of EU_LAC. It helps publishers to facilitate and streamline metadata management, and also hosts a repository of OA book titles from across the region.

Find out more

Platforms & services

ASK UP

Rotating presses give first hand experience answers. Also an FAQ section and list of previously curated answers. We like the idea, unsure how widely used it is.

Find out more

Experimental Publishing Compendium

A comprehensive online resource created by Copim’s Experimental Publishing Group bringing together tools, practices, and books to promote and support the publication of experimental book publications. Shows the advantages and opportunities that online publishing can offer for innovative collaboration, interactions and experimentations.

Find out more

Open policy finder | Jisc

Formerly know as Jisc’s well established Sherpa toolsuite of resources (journals) - Open policy finder developed to support the UKRI OA policy for longform, it is still relatively new (released early 2024) and a limited number of publisher data sets included. This is increasing and it will move to live release in autumn 2024. Strong sector and funder support.

Find out more

OPERAS Pathfinder

A publication service finder for editorial managers, editors and authors at any stage of a publication project. Useful resource as caters for different stakeholder groups; currently in beta so not fully developed but hosted by Operas so watch this space…

Find out more

Open Book Collective

The Open Book Collective is that brings together open access book publishers, open publishing service providers, and knowledge institutions, including libraries, working in collaboration to secure a more sustainable and equitable future for open access books. They accept member organisations in the form of publishers and open infrastructure providers.

Find out more

Open Book Environment (OBE)

The Open Book Environment is a transparency dashboard about publishers, aimed at authors (and their funders) focussing on author fees, licensing, their policies on self-archiving, waiver and discount information, and any stated price justification. It is a very recent resource (2023) however, its longevity is unclear because it is a Google sheet maintained by two volunteer contributors. It also currently does not cover many publishers, but is being added to over time. It may be worth contacting the creators to ask about their long-term plans for the resource.

Find out more

Open Science resources | Latin America

A visual / interactive dashboard and an example of a multilingual, regional / RoW resource.

Find out more

OA Book Stakeholders | African Context

This relational diagram is an unparalleled resource in a very under-described region for OA books. While the EIFL report on OA in Africa is very detailed and informative it only deals with journals, while this focuses on books. The relationships are not always clear, and since this is a relational diagram it is not very descriptive, but it is a very useful starting point.

The PDF of the relational diagram and the mission statement accompanying it are available here

IOI Infrafinder

This tool, created by IOI (Invest in Open Infrastructure) provides an avenue for those seeking open infrastructure to search their database by infrastructure type, and along a variety of other parameters, to find appropriate solutions.

Find out more

Thoth

Thoth is a non-profit, open metadata management and dissemination platform. An active and successful outreach campaign has enabled revenue targets to be met. Thoth integrates into third party platforms, these collaborations enable seamless access to Thoth's metadata management and distribution capabilities across diverse scholarly platforms.

Find out more and **see their github**

Projects

Copim Open Book Futures

Copim is a community of people, organisations, and infrastructures working towards equitable and sustainable open access for scholarly books. It takes a community-led and values-driven approach to these. It is also, from 2023-2026, a Research England and Arcadia-funded research project into this topic. It consists of numerous work packages about equitable OA funding, experimental publishing forms, metadata and archiving for OA books, and other topics.

Find out more

DIAMAS

The DIAMAS project is an ongoing Horizon Europe funded initiative that aims to improve the efficiency and quality of Diamond Open Access (OA) publishing in Europe. It focuses on developing a European Reference Standard for institutional publishing and supporting Diamond OA publishers and service providers.

This page below hosts links to a number of DIAMAS resources on Diamond OA publishing. While many are journal-specific, some are more generic and/or aimed at Diamond OA publishers more generally. Included are a series of high-level and in-depth articles about Diamond OA publishing, DOAS (the Diamond Open Access Standard), and its components. It also contains self-assessment tools, a glossary, and a number of resources on sustainability for publishers, service providers and funders.

Visit the resources

PALOMERA

The PALOMERA project, which ended in early 2025, aimed to ensure academic books and monographs are not neglected in Open Science and Open Access policies. Subsequently, they created a set of actionable guidelines to support and coordinate funder and institutional policies for OA books, with the goal of speeding up the transition to OA for books in particular.

View the actionable recommendations

Additionally, a collection of documents such as reports, policies, statistics, survey results and interview transcripts relevant to OA policies regarding OA books in the European Research Area (ERA), it is hosted on OAPEN's website, and includes over 600 documents in various languages, open to anyone to browse and read. The Knowledge Base aims to help the community as a first step towards a better overview of what documents exist or are available.

View the Knowledge Base

Reasonable Costs for Public Access project (IOI)

Since 2023, Invest in Open Infrastructure has been conducting a project entitled "Investigating 'reasonable costs' to achieve public access to federally funded research and scientific data", with financial support from NSF - National Science Foundation.

Find out more

Towards an Open Monograph Ecosystem (TOME)

Towards an Open Monograph Ecosystem was a US-based project aimed at changing the way monograph publishing in the humanities and social sciences is funded. It published a concluding report about the author experiences with the TOME project, and more general conclusions about how the groundwork with authors and universities would need to be built on by any subsequent projects.

View the report

Country-Specific Guides

This section contains guidelines, reports and other resources, across a broad range of subjects, which pertain to specific geographic areas. These are roughly divided into the UK, the European Research Area (ERA), and the rest of the world.

The compilers of this resource acknowledge unreservedly that the disproportionate weighting given to the UK and the ERA throughout this entire resource are a reflection of our own experience, despite some attempts to mitigate this.

We are very happy to receive further suggestions if you have any, at info@copim.ac.uk.

European Research Area (ERA)

The European Research Area (ERA) is the ambition to create a single, borderless market for research, innovation and technology across the EU. Find out more on European Commission website.

How to flip your journal: A guide to more equitable publishing with Diamond Open Access

This guide, an output of the Strengthening Diamond OA in the Netherlands project, is a comprehensive guide to the rationale and logistics of flipping a journal to Diamond OA; what routes are available, how they work, the financial aspect, and case studies for implementation. While it is speaking primarily to the Dutch context, the suggestions are more widely applicable.

View the guide

PALOMERA Knowledge Base

The Knowledge Base is a collection of documents, such as reports, policies, survey results and statistics, relevant to Open Access (OA) policies regarding OA books in the ERA. The collection was created as part of the PALOMERA project.

It is an unparalleled resource in terms of providing a centralised hub for OA documents from across the ERA in a range of languages, varying greatly in scope from individual publisher guidelines to national mandates.

View the Knowledge Base

Rest of World

Around the World with the Open Access Books Network (OABN)

A series of blog posts from the OABN which focus on OA books in a different country around the world, highlighting their regional experiences, problems and successes. This is an ongoing series that is still being updated, and unlike many OA resources provides perspectives from beyond the ERA.

View the blog posts

Canadian Library Journal Publishing: A Primer

This primer, produced by the Canadian Association of Research Libraries (CARL) in 2024, on library publishing in Canada. It has a focus on journal publishing. As well as providing a brief summary of the support available to journals at CARL libraries, it also summarises some of the core principles of library journal publishing more widely to do with commerciality and fees, diversity, and discovery/preservation.

View the Primer

CARL have also produced further reports, some of which are region-specific, such as copyright for Crown-published works, and on OER policy and infrastructure.

View a full list of their outputs

EIFL Report on 'Landscape of no-fee open access publishing in Africa'

A landscape study on Diamond OA journals in Africa which provides detailed reports for several countries and thorough general conclusions about the state of Diamond OA journals in the region, their current challenges, and suggestions for the future. It also provides the survey data which provides a large amount of granular data.

View the report

Open Access Australasia

This association, Open Access Australasia, advocates for and supports practical initiatives on open access in Australia and Aotearoa New Zealand. It is a large community, with several written resources, groups, directories, and others.

Find out more

OA Book Stakeholders (African Context)

This relational diagram is an unparalleled resource in a very under-described region for OA books. While the EIFL report on OA in Africa is very detailed and informative it only deals with journals, while this focuses on books. The relationships are not always clear, and since this is a relational diagram it is not very descriptive, but it is a very useful starting point.

View the PDF of the relational diagram and the accompanying mission statement

Open Science resources (Latin America)

A visual / interactive dashboard and an example of a multilingual, regional / Rest of the World resource.

Visit the dashboard

Report from a workshop on sustainable open access book publishing in East Africa

In October 2024, a collaborative online-session for publishers from East Africa was co-organised by the Directory of Open Access Books (DOAB), OAPEN, the Open Access Scholarly Publishing Association (OASPA) and French research institutes in Africa, Les Afriques dans le monde (LAM) and the French Institute for Research in Africa (IFRA), supported by the National Centre for Scientific Research in France (CNRS). The session covered approaches towards equitable and sustainable open access for scholarly books.

Read the report

UK Guidance

An introduction to UKRI’s fund for longform outputs

This is a guide for UKRI-funded authors on how to use the UKRI research fund to make their longform works immediately available open access (mandatory since early 2024).

It sets out the available funding limits for BPCs, CPCs and for OA subscription funds. It also sets out the application process.

Read the guide

Guidance on managing copyright under UKRI open access policy

UKRI's report from 2023 provides guidance and explanations on third party copyright in the UK context when dealing with open access. It is aimed at researchers (and research organisations). who are seeking clarity on copyright for their open access publications.

Read the report

Glossaries and Knowledge Bases

This section gathers together two broad types of informational resources. The first is two glossaries, providing definitions of OA terms and translations into other languages; the second is a range of, compendiums of information about OA, policy finders, and some others.

Glossaries

Forum for Open's Open Science Arabic-English Glossary

This glossary contains descriptions of key terms regarding open science in Arabic. Currently, it mostly covers open access journals and open data, with no mention of books.

Visit the glossary

IFLA Open Access Vocabularies

This resource is a PDF of some key terminology used in open access. Unlike many glossaries, it does cite its sources for definition - but this is also a weakness because it does not, therefore, appear like they have taken a range of definitions and collated/merged them into one broad definition. Additionally, this appears to be aimed at journals. One benefit is that it does contain some translations, while other glossaries that may be more comprehensive and considered (such as the OAPEN toolkit one) are in English only. This was produced in May 2024 so it is very up to date.

View the vocabulary

Knowledge Bases

A Guide to Publishing Open Access Monographs, Books, Book Chapters and Long-form Outputs

This guide has been designed by Lancaster University to provide an introduction to Open Access Book Publishing. Each section of the resource will introduce you to key themes related to Open Access Book publishing, make you aware of key considerations and provide you with useful resources to explore topics in more detail.

The resource can either be used as a reference guide and users can navigate directly to the topics they think relevant, or it can be utilised as a short online course with users working through each section individually.

Access the guide

Experimental Publishing Compendium

A comprehensive online resource created by Copim's Experimental Publishing Group bringing together tools, practices, and books to promote and support the publication of experimental book publications. It shows the advantages and opportunities that online publishing can offer for innovative collaboration, interactions and experimentations.

Visit the compendium

Library Partnership Rating Rubric

The Library Partnership Rating is a collaborative and library-developed framework for librarians who seek to quantify the alignment of publishers with themselves as they consider investing library resources. It was first developed by Rachel Caldwell at the University of Massachusetts Amherst and Robin Sinn at Iowa State University, although it now has a large advisory council made up of several libraries and publishers.

The current iteration of the rubric, which has been adopted and adapted by many libraries as they consider OA investment offers (among other resource requests from publishers), covers journals specifically. However, a working group is currently aiming to expand its coverage

to books. As it is primarily a US-focussed resource, librarians in other regions wishing to adopt a similar rubric may need to localise some parts of it.

Learn more about this resource

Open Access Directory

The Open Access Directory (OAD) is a wiki / compendium of simple factual lists about open access (OA) to science and scholarship, maintained by the OA community at large. While very journal-focussed it does have some book and wider OA lists/information.

It contains lists and data that is not replicated in other resources but would be interesting to some, e.g. around the history of open access. It is more relevant for those interested in open access in and of itself than many other listed resources.

However, its information is out of date in some highly relevant places such as OA book business models, which was a page last updated in 2020 and which is missing recent developments.

See the directory

Open Access for Books (Jisc)

A new feature in Jisc's Open policy finder (formerly Sherpa services, a toolsuite of resources for journals), this is a policy-finder developed to support the UKRI OA policy for longform.

It is still relatively new (released in beta early 2024 with a limited number of publisher data sets included) but this is increasing following the move to live release in autumn 2024. It has strong sector and funder support.

Use the tool

Open Access Network: Open Access Books summary Infohub

A German language (English option available) online summary info hub on OA books. Comprehensive coverage of all things OA but content probably covered in other resources.

Visit the infohub

PALOMERA Knowledge Base

The Knowledge Base is a collection of documents, such as reports, policies, survey results and statistics, relevant to Open Access (OA) policies regarding OA books in the European Research Area. The collection was created as part of the PALOMERA project.

It is an unparalleled resource in terms of providing a centralised hub for OA documents from across the ERA in a range of languages, varying greatly in scope from individual publisher guidelines to national mandates.

Visit the Knowledge Base

Where can I publish a book open access without (necessarily) paying a fee? A list of Diamond open access options

This list compiles Diamond OA book publishing options that are available to researchers who are interested in OA but do not have the means to cover a book processing charge.

View the list

Toolkits

This section contains toolkits already available which cover different aspects of open access. As such, they are thematically very varied. There is a lot of discussion about what actually constitutes a toolkit, its aim and purpose but for simplicity's sake, we have kept it to self-identified toolkits, and or tools/guides that provide highly practical guidance to implement.

Toolkits

Catalogue of Criteria for Assessing the Funding Eligibility of Open Science Infrastructures

This criteria catalogue and the accompanying assessment questions were developed by a working group of KEMÖ (Kooperation E-Medien Österreich, the Austrian Academic Library Consortium). They are intended to support research institutions and organisations in the evaluation of Open Science Infrastructures. The 20 criteria outlined in the catalogue provide a structured basis for making informed decisions regarding the financial support of these infrastructures.

The assessment questions are intended to be completed by Open Science Infrastructures.

Download the assessment questions

Toolkits

COPIM's toolkit for running an Opening the Future programme at an academic press

This document sets out how Copim implemented the Opening the Future (OtF) model, including the documentation of challenges, resources, timetables, and activities.

It is intended as a roadmap for other presses that wish to implement an ‘Opening the Future’-esque model. It is the only toolkit dedicated to flipping book publishing from closed to open (although the Information Power report due in December will likely render this incorrect).

It is now slightly out of date as many of these funding models have developed greatly since 2020. It is also not currently very user-friendly and has not been widely adopted.

View the resource

It has now been superseded by Books 6 , 7 and 8 of Copim Compass.

Toolkits

DIAMAS Best Practices checklist for Diamond OA publishers

This self-assessment checklist from the DIAMAS project is for publishers of Diamond OA books and journals. It provides guidelines for best practice in several areas (e.g. governance, funding, editorial integrity) and provides suggestions for improvement. It also provides external links for more information to support these guidelines.

View the checklist

Toolkits

European University Association: The new university Open Access checklist

This checklist, produced in 2021, made recommendations for advocacy and actions to support open access implementation within universities.

These are categorised into:

- Empowering the university
- Building capacity
- Reinforcing this capacity

It also provides clear parameters, rationales, suggestions for action, and expected outcome of these actions. While this report was aimed at universities as research centres and funders, it is extremely useful for publishers regarding the possible perspectives and strategic goals of universities.

View the checklist

Toolkits

Experimental Publishing Compendium

The Experimental Publishing Compendium is a guide and reference for scholars, publishers, developers, librarians, and designers who want to challenge, push and redefine the shape, form and rationale of scholarly books. The compendium brings together tools, practices, and books to promote the publication of experimental scholarly works.

Access the Compendium

Toolkits

Focused Toolkit for Journal Editors and Publishers: Building Diversity, Equity, Inclusion, and Accessibility in Editorial Roles and Peer Review (C4DISC)

The toolkit is focused on building representation among peer reviewers and fostering equity in the actions of peer reviewers. It is also dedicated to building DEIA into core aspects of the wider editorial endeavor. While it has detailed, and in places, useful, guidance, and is very new (published May 2024) the majority of the advice is only relevant to very large and well-funded outfits with robust reporting tools, mostly with a focus on journals. It also mentions open access as a facet of equity, but suggests using transformative agreements.

View the toolkit

Toolkits

New University Press toolkit

An online guide from Jisc supporting and giving guidance to new university presses and library-led publishing ventures. It is a trusted and valued resource.

View the toolkit

Toolkits

OAPEN: OA books toolkit

This toolkit aims to help book authors to better understand open access book publishing and to increase trust in open access books. Authors can find relevant articles on open access book publishing following the research lifecycle, by browsing frequently asked questions or by searching with keywords.

In our research we broke this wide-ranging and comprehensive author-focussed tool into three sections:

- **Life Cycle** - a series of articles laid out in the 'life cycle' of a book from choosing a publisher through to publication, dissemination and reuse
- **FAQs** - a list of FAQs about OA books that link to brief answers, and also to associated Life Cycle article
- **Keywords and Glossary** - a list of frequently used terms to do with OA books, and the keywords, which is a similar (but not identical) list which links to articles in the toolkit which contain that word

The toolkit is extremely thorough, detailed, clear, comprehensive, well-referenced and useful, and should be used as the main place to point OA authors to. It is also being regularly updated and maintained, and is likely to be supported for a long time as it is at OAPEN.

View the toolkit

Toolkits

Open Book Collective toolkit

The Open Book Collective toolkit is for small, scholar-led OA publishers who are either setting up a press or seeking to improve its operations. It covers a broad range of aspects about setting up a press and building one up logistically and reputationally. It also provides case studies. It can be used alongside the Jisc NUP toolkit.

View the toolkit

Toolkits

Scholarly Communication Toolkit: Open Access Policies & Publishing toolkit

This resource has also pointed to some other toolkits that could be interesting as a lot of them cover negotiating agreements from library POV. However, the authors do not personally feel qualified to assess this particular resource given it is a North American resource (other than noting it has not been updated for a few years!).

View the toolkit

Toolkits

SCURL EDI Network: EDI toolkit

This toolkit from the SCURL EDI Network aims to support member libraries in embedding good practice consistently across services. It is comprehensive and useful and comes at the topic from several angles - that of evaluating EDI in the workplace and recruitment, but also from policy and how to support students in the library.

The plan is to annually evaluate and update it, and the resource is very recent (from 2023). It covers the topic from a library point of view but has more widely applicable sections (e.g. on hiring policies).

It is a good toolkit - but specifically library (and UK)-focussed so does not fulfill the publisher's perspective need - overall a very good resource for EDI in libraries.

View the toolkit

Toolkits

Toolkit to foster Open Access Agreements for Smaller Independent Publishers (cOAlitionS)

This toolkit was developed by Information Power, commissioned by cOAlition S and ALPSP. It provides concise guidance, example licences and data templates for smaller publishers to use while negotiating agreements with libraries. It is journal-focussed, and there is another Information Power report (2025) which focuses on books.

View the toolkit

Toolkits

University of London Press launch a new Open Access in the Humanities online training course

University of London Press have developed a new online training course on open access publishing with the School of Advanced Study. The course is free and available via the School's RESHAPED platform – a new training and research community space for researchers in the Humanities.

The course offers an introduction to open access publishing for humanities researchers at all career stages, as well as students, librarians and research support staff, and provides the practical information needed to navigate today's open access landscape. It is divided into three interactive, accessible 20–30-minute modules covering what open access is; models, funding and licensing; and how to make your publications open access. It provides the practical information needed to navigate today's open access landscape. The course also includes interactive activities, knowledge checks, resource banks for further learning and videos with other experts in this space.

Explore the RESHAPED platform and the new open access course: Open Access in the Humanities. You can either create an account on the platform, or you access it as a guest with no login required.

Toolkits

Library Publishing: How to Launch, Enhance, and Sustain Your Program (ALA)

This volume, put out in 2025 by the American Library Association, provides comprehensive and extensive guidance on how to launch, grow, and sustain library publishing programmes. It does this through detailed case studies and reflections from libraries who have managed this in different ways, and therefore provides a flexible, rather than proscriptive, set of tools and advice. While it has a focus on journals, both scholarly monographs and OERs are included. As it consists of case studies, it does not contain end to end guidance for library publishing workflows, but will certainly provide useful suggestions, caveats and other information for libraries looking to implement, grow, or attain sustainability for their publishing endeavours.

View resource here.