

# 08. Opening the Future: Workflows, partners & marketing

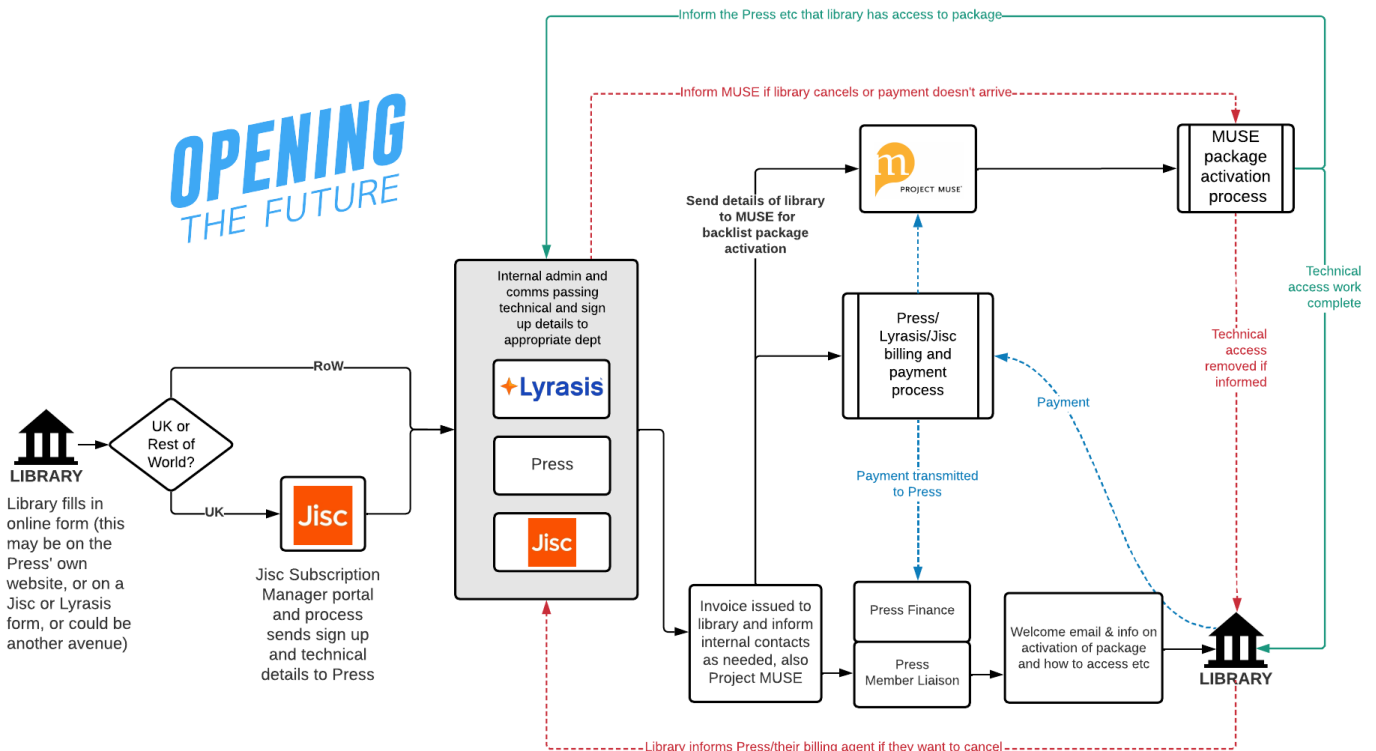
In order to implement Opening the Future on a day to day level, several organisational partnerships, website updates, workflows, and other BAU activities will be necessary. This section provides information about the workflows for using Opening the Future, including details of third party services, licence templates, and a lengthy FAQ that we have built up over several years of outreach and troubleshooting to authors, libraries, and publishers.

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# Organisational partnerships

Delivering a worldwide membership programme requires significant resources. You can make the process more streamlined for yourself by working with trusted partners who can slot into different points in the process. The diagram below shows the relationships and membership workflow of the 'standard' implementation of OtF. We would also like to emphasise that **it can of course be modified to suit you, based on capabilities and agreements you may already have or prefer**. For example, for backlist package hosting and activation, while Project MUSE are in the diagram and provide these services for both CEU Press and Michigan State University Press, this is not a universal rule. Liverpool UP don't use Project MUSE to host their backlist as they have their own LUP platform, Boydell & Brewer work with Fulcrum in this capacity, and Basler Afrika Bibliographien work with the African Books Collective.

## Diagram of the membership sign up workflow and relationships



## Explanation of the steps in the diagram

The attached short document describes in more detail the various steps highlighted in the diagram. Download the Word document here [Generic OtF billing & package activation access process steps Feb 2025.docx](#)

## Important partners in the workflow of the model

Below we list the partnerships that we developed for Opening the Future, their role in the delivery, pricing, and their contact details.

## **1. Billing and sales partnerships**

Listing your OtF offering with Lyrasis and Jisc is extremely important, as they are highly experienced in organising the sign up and billing of these sorts of agreements between publishers and libraries in the US and UK respectively, where many supporting libraries are based. It is also an indicator of trustworthiness for the libraries to be hosted on these platforms.

### **Lyrasis**

Lyrasis is a non-profit membership organization that catalyzes and enables equitable access to the world's knowledge and cultural heritage. Lyrasis helps its members succeed by working with them to identify their needs, issues and challenges, and by providing products, services and learning experiences to address them. Lyrasis provides leadership in, and opportunities for, innovation and sustainability and in facilitating their members' pursuit of a preferred future.

Lyrasis has long been a supporter of membership-based open access models in North America. It is also usually already setup as a supplier in many North American institutional systems, thereby substantially lessening the overhead of payment processing for most presses.

Lyrasis charges a percentage transaction fee, which can be included in the financial modelling spreadsheet found elsewhere in this toolkit.

**Contact:** Sharla Lair, Senior Strategist, Open Access & Scholarly Communication Initiatives ([sharla.lair@lyrasis.org](mailto:sharla.lair@lyrasis.org))

### **Jisc**

#### Jisc

Jisc works on behalf of its members and customers in the United Kingdom, to negotiate and license the high-quality digital content agreements needed to support academic research, teaching and learning. Its strategic groups set the direction of national-level negotiations.

Jisc is the official intermediary for most content made available to UK libraries. Many UK libraries expect to be able to sign up through [Jisc Library Subscription Manager](#). Jisc has a template license developed in partnership with Copim that can be used quickly to establish new Opening the Future programmes. Jisc levy a 2% transaction fee to publishers per library subscription.

For the Jisc Licensing Template you can download this example copy but note that it will need adapting to your own packages, date ranges and prices etc in discussion with Jisc [□ Example Jisc Opening the Future Licence & Offer.docx](#)

**Contact:** Caroline Mackay, Licensing manager ([caroline.mackay@jisc.ac.uk](mailto:caroline.mackay@jisc.ac.uk))

## **2. Partnerships for delivering the content**

Content delivery is an important component of this model; firstly the delivery of backlist packages to libraries, and secondly ensuring that the frontlist OA titles enabled by the library funding are findable.

### Backlist pack delivery

#### **Fulcrum**

One option for backlist package hosting is Fulcrum at the University of Michigan. They have provided a range of publishing services to mission-driven publishers since their full launch in 2018, all driven by five core design principles: flexibility, durability, discoverability, accessibility, and integrity.

Fulcrum offer robust metadata provision to participating libraries, many of whom are already using the platform (for library members they offer free MARC records and KBART files, along with COUNTER 5-compliant usage reports). Of particular note, Fulcrum provides the access control for the subscription portions of Opening the Future, thereby avoiding the need for presses to implement their own access control measures (see below on Technical Infrastructure).

They offer library fulfilment, and presentation of publisher lists among many other services, and **can work with for-profit publishers**. Currently, they work with Boydell & Brewer on their iteration of Opening the Future.

**Contact:** [fulcrum-info@umich.edu](mailto:fulcrum-info@umich.edu)

#### **Project MUSE**

Project MUSE is a leading provider of digital humanities and social science content for the scholarly community around the world.

For more than 25 years, Project MUSE has been the trusted and reliable source of complete, full-text versions of scholarly journals from many of the world's leading universities and

scholarly societies. Currently, Project MUSE has over 700 journals from 125 publishers and offers nearly 70,000 books from more than 140 presses.

Project MUSE offers robust metadata provision to participating libraries, many of whom are already using the platform (for library members they offer free MARC records and KBART files, along with COUNTER 5-compliant usage reports). Of particular note, Project MUSE provides the access control for the subscription portions of Opening the Future, thereby avoiding the need for presses to implement their own access control measures (see below on Technical Infrastructure).

However, it must be noted that **Project MUSE can only work with non-profit organisations**. Therefore, any commercial publishers wishing to implement OtF will need to find an alternative platform for libraries to access the backlist packages.

Currently, they work with CEU Press and Michigan State University Press on their iteration of Opening the Future.

**Contact:** Nicole Kendzejeski, Associate Director ([MUSE@jh.edu](mailto:MUSE@jh.edu))

### The African Books Collective

The African Books Collective was established in 1989 to provide infrastructure for African publishers who were finding it difficult to disseminate their books to buyers and libraries in other regions. Since this time, they have responded to the evolving needs of publishers and now distribute and market eBooks, undertake production work, and provide marketing services. They remain a vital infrastructure for over 150 academic and trade publishers in the region, leveraging economies of scale on their behalf to ensure their eBooks are available on major global platforms.

Participating libraries will be able to access MARC records and KBART files customised to their holdings, and to retrieve COUNTER 5-compliant usage statistics.

Currently, they work with Basler Afrika Bibliographien on their iteration of Opening the Future.

Contact: Stephanie Kitchen, Executive Director ([stephanie@africanbookscollective.com](mailto:stephanie@africanbookscollective.com))

### Sciendo

Another alternative service provider for backlist package hosting is Sciendo, a provider of publishing solutions based in Poland who already undertake library fulfilment services of this kind, and have confirmed they are open to hosting for the OtF scheme in particular.

**Contact:** Kasia Zasada, Product Manager ([Katarzyna.Zasada@sciendo.com](mailto:Katarzyna.Zasada@sciendo.com))

## Ensuring findability of frontlist OA titles

### **OAPEN & DOAB**

OAPEN promotes and supports the transition to open access for academic books by providing open infrastructure services to stakeholders in scholarly communication. They work with publishers to build a quality-controlled collection of open access books and provide services for publishers, libraries, and research funders in the areas of hosting, deposit, quality assurance, dissemination, and digital preservation.

They deposit all books published openly through the Opening the Future scheme in OAPEN to enhance discoverability and use of the open content.

DOAB is a community-driven discovery service that indexes and provides access to scholarly, peer-reviewed open access books and helps users to find trusted open access book publishers.

**Contact:** Silke Davison, Community Manager ([s.davison@oapen.org](mailto:s.davison@oapen.org))

### **Thoth Open Metadata hosting service**

Thoth is an Open Dissemination System for Open Access books, and a fellow work-package on Copim. They are founded on the principle that OA publications are only as good as their metadata - i.e. their findability. They have both free and paid services for metadata creation and dissemination.

It is specifically designed for OA books and consists of:

- An API to export open metadata (CC0) in multiple formats such as ONIX, MARC, etc.
- An easy-to-use front end to manage metadata records.

They also offer Thoth Hosting, which offers seamless, efficient, and globally-optimised solutions for content and website / catalogue hosting to streamline distribution of a publisher's publications, and will also provide open and privacy-respecting usage statistics. If you need a site to host your OA frontlist publications, **Thoth Hosting may be a solution but they cannot host the closed backlist content.**

**Contact:** <https://thoth.pub>

## Related networks

The groups outlined below are not all part of the OtF model or partner workflow, but may be of interest to presses looking to pool resources. For example, the Open Book Collective (OBC) functions comfortably alongside OtF so you could consider both implementing OtF as well as applying to join the OBC.

### **The Opening the Future Community of Practice**

In April 2026, Opening the Future is launching a new Community of Practice comprising its participating publishers and members of the Library Advisory Board that was active until March 2026. It will meet quarterly to share experiences and information and for mutual support - all interested librarians and prospective publishers are welcome to join. More details to follow!

### **Open Book Collective**

The Open Book Collective is a group of OA publishers, publishing service providers and research libraries who work together through an online platform to sustain an equitable infrastructure for OA Books. They are a sister work package to Opening the Future, **providing collective funding without offering backlist packages**. However, they have strict requirements for their publishers regarding current and future commitment to flipping a press' entire frontlist to OA. If you meet their criteria, their model functions comfortably alongside OtF and you may want to consider both implementing this model, and applying to join the Open Book Collective.

Link to <https://openbookcollective.org/>

# Further logistics and workflows

- **You will need to display information on what packages of backlist books you are offering, and where to sign up for them.**
- **A sign up or simple enquiry form could be on your website, or on that of a 3rd party, and/or it may point potential members to the subscription pages on Jisc and Lyris' websites.**
- **If you are handling your own sign ups, or for those not handling by another party, you will need to capture a few details but this can be as straightforward as a contact form with a few mandatory fields.**
- **Your backlist content delivery platform of choice will need to provide appropriate metadata and metrics as well as gated, time-bound access to the backlist package for members. We have suggestions for platform providers in the section on 'Organisational Partnerships'.**
- **We recommend using the lightweight Shared E-Resource Understanding (SERU) to govern library access to the backlist.**
- **Transparency is crucial on where library member investment has been spent (i.e. you need to display information on what books have been published by members, and who those members are)**

## Making your offer public and transparent

You will need to make some updates to your Press website in order to promote and implement Opening the Future effectively; libraries need clear information about what is on offer, and what the funds raised are for. Even if you are using a 3rd party partner to deliver some or all of the programme, you will need at least to display the following information as a minimum on your and/or their website or portal:

1. A list of your backlist offering(s) i.e. what books are included in the deal, why they are important in their subject, what topics are covered
2. We recommend also supplying a simple downloadable list of the titles with some extra metadata like co-authors, ISBN etc
3. The price bands for different institutions, and for the duration of their subscription (noting any annual increases)
4. A link to the sign up process you use - make it easy for libraries to engage with as few clicks as possible
5. General information about the model, why you are implementing it, how it works, and the key benefits to the library and to you as the publisher, as well as some information about your press. You will have your own reasons for implementation and what benefits you feel

your particular offering has to libraries; the information on how it works can be adapted from this toolkit.

6. FAQs of useful information for libraries and authors; we have reproduced our FAQ page later in this toolkit for you to draw from.
7. A section or page listing and thanking your library supporters: an important pillar of community-funded programmes like OtF is transparency not only on prices but on who else is involved too. Note also that some libraries are more likely to sign up when they can see others in their network are also involved.
8. An updateable section or page collating the list of titles you have published so far using Opening the Future and titles that are earmarked for Opening the Future but are still forthcoming. This should contain links to access the published OA books, be that on OAPEN or elsewhere. This is another crucial pillar of community-funded programmes: as trusted stewards of their institution's money, library members need to know how/where that investment is being spent. Information on what has been published through their investment may also be critical for libraries building internal cases to justify renewing their membership. Two-way trust is one of the key pillars of the OtF model, so any ways in which you can be transparent will help to sustain this trust.

**Expand the box below to see example web pages of how the Copim project displayed this information for Central European University Press's OtF programme.**

**Example web pages displaying crucial OtF information for CEU Press**



An updateable list of supporting members is crucial to show libraries who else is supporting and is a way of publicly saying thank you as well as demonstrating wide take-up of the model.

Also crucial is an updateable list of how many books have been funded by the programme, what they are, where they can be found, and what other books are funded/in the pipeline. This is key to demonstrating transparency and engendering trust between the press and the library community who are investing their budgets.

# How do library members join?

You need to make it as simple as possible for libraries to engage with the model and to become members. The Copim project created a free open source sign up tool that anyone can implement with a little bit of technical knowledge but in fact your sign up interface could be as simple as an email address or a contact form on your website. **As long as you display the information recommended in the section above and have a quick way for libraries to pledge, enquire or join then you can launch the model.**

We strongly recommend you also have an agreement with Jisc in the UK, and Lyris in North America, to get them to list your offer on their websites/catalogues. As well as these being trusted library network partners, they offer you more exposure and they can handle some billing for you too. Details on how to get an agreement with them can be found in the previous section of this toolkit, under the section **Organisational Partnerships**.

If you want to explore using the free open source tool Copim designed for displaying the model and managing sign ups then you can find all the details and code on Github [\[1\]](#)

<https://github.com/openlibhums/otf-signup>

Expand the box for more in-depth technical detail on the sign up system developed by Copim.

### The OtF signup system technical details

Features of this platform include:

- Content Management System [CMS], allowing editing of webpages to display packages and other info
- Ability to collect sign up data
- Access control notification system
- News page functionality
- Per user and per role access control

Running the sign up infrastructure requires an independent web host capable of serving wsgi applications in python. The overheads of running this system locally should be matched to the Press's in-house technical capacity. As always, the cost of free software must be measured in the time that it takes for an in-house individual to maintain a site vs. the cost of externalising/outsourcing such provision. Additionally, this will not be supported after April 2026. Therefore, unless you are confident that you have the technological capability to implement and sustain this, we do not recommend that you use it.

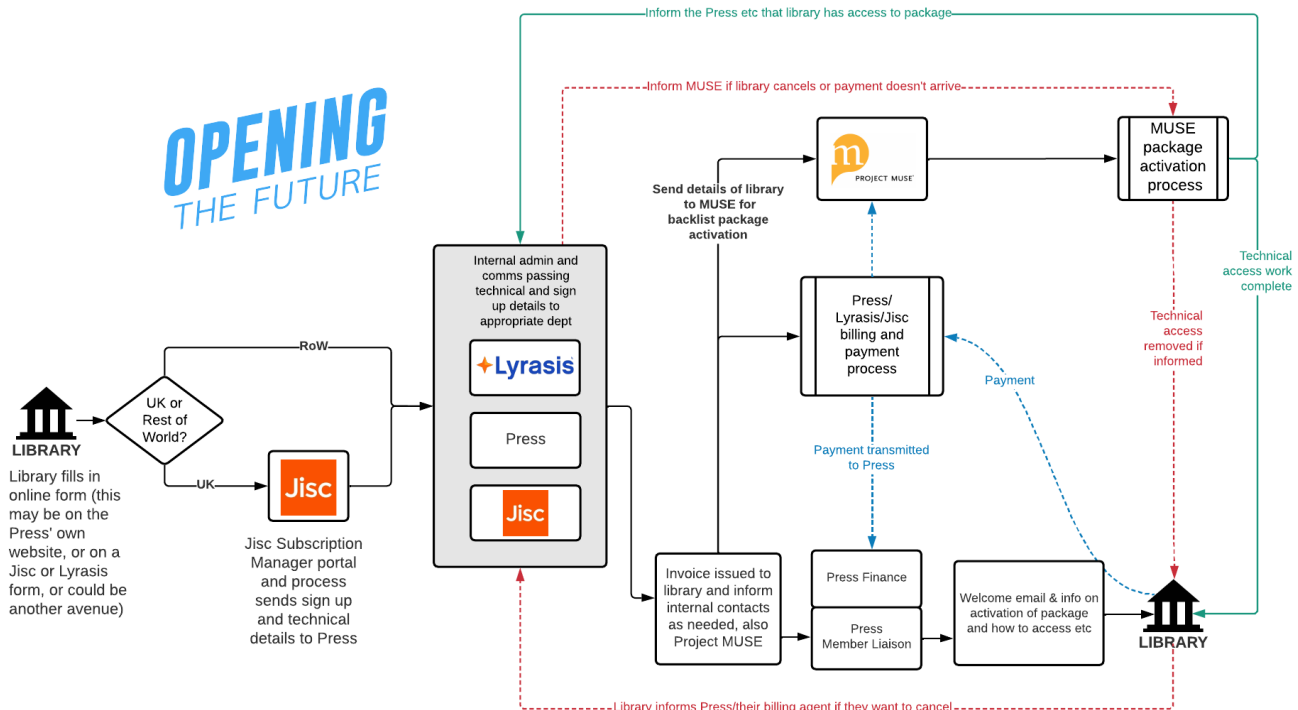
## Sign-up Workflow

The workflow for Opening the Future can be as simple or as complex as you want it to be but it does involve multiple actors involved at different times, so coordination between different parties requires a little care and some technological interfaces.

The workflow has to handle the following core activities:

- **Library sign up**
- **Payment processing** (this may be your normal financial process, for example, you may already invoice and manage subscriptions to journals you publish and can adapt this process very slightly for OtF members)
- **Access control management** (if you use Project MUSE they will handle this for you, but you may have your own platform or a relationship with another provider who will need to be able to control access to a package of your backlist books)
- **Library cancellation** (a library may need to cancel their membership before their 3 years subscription has expired. In practice, this never happened once during the Copim project implementation of the model)

# OPENING THE FUTURE



## Actors and Actions

Actors	Action	Notes
Library	Completes form on website or sends email	Alerts the appropriate contact at the Press and intermediaries
Jisc, Lyrisis, Press	Depending on the region (or on your partnerships), Jisc, Lyrisis or the Press itself will process the signup. In the case of Jisc or Lyrisis, the Library may complete a signup on their system instead of contacting the press directly.	If a library signs up through Lyrisis or Jisc's independent catalogue platform, it may be necessary to copy the details into the Press's own CRM system, subs system, or however they choose to track and manage members internally.
Jisc, Lyrisis, Press, Project MUSE, Other platforms	The Press or intermediary (Jisc, Lyrisis) informs the platform provider (e.g. Project MUSE) that access should be granted to the signup institution	By default we recommend enabling perpetual access just before payment is received and retracting it if not received within 3 months. The beauty of making access perpetual from the start is that after 3 years' membership, no further admin is required on the library's backlist access.
Jisc, Lyrisis, Press, 3rd party	Issue invoice to Library.	

Actors	Action	Notes
Press	Send welcome email to Library.	The welcome email is an opportunity to thank the library and should include: Details of access to subscription packages and what metadata records are available (e.g. MARC, KBART) A proposed comms announcement (see more info under Marketing and Outreach)
Library	Cancellation	If a library cancels within the three year window, access should be revoked.

# Sign-up Infrastructure

In essence, the sign up process is just the delivery of various pieces of information from the library to you, the publisher. These are:

- The identity and location of the library.
- The library's IP range for your content delivery provider to switch on their access to the backlist (or whatever other technical access control you/your platform uses e.g. OpenAthens ID)
- Which package(s) they would like to sign up to
- A contact for you/your agent to invoice and to discuss various payment details such as if they will pay all three years upfront or in annual instalments.

As noted before, Jisc and Lyrasis can provide some technical sign-up functionality on their subscription manager platforms which you can link to on your site. But if you are managing your own subscriptions, and for subscriptions outside of the UK and US, you will need your own sign up interface (a sign up tool, a contact form, an email address, whatever). You may already have internal processes and a CMS and/or Customer Relationship Manager (CRM) that you can adapt to use on your Opening the Future programme in manage the back office smoothly. **As noted, it can be as simple as a sign up form, which triggers a notification to you with the relevant information in order to process the sign up.**

# Delivering the closed Backlist & OA Frontlist content

## Delivery of the closed backlist subscription content

The final part of the membership workflow is the delivery of subscription content to participating libraries.

This is a process that will be familiar to libraries via their ordinary subscriptions and other forms of collections access. As detailed in the previous section on **Organisational Partnerships**, there are multiple options (listed are Project MUSE, Fulcrum and Sciendo), with whom you may already have a relationship.

The conditions of access must be made clear in your offering. It is important that the content is hosted on a reputable platform that delivers appropriate metadata in standards-compliant formats (e.g. COUNTER) and that the content is indexed in order to appear in library discoverability services. **The platform hosts we suggest are able to provide this.** Additionally, you must make clear the licensing terms under which the libraries will have access to the backlist package.

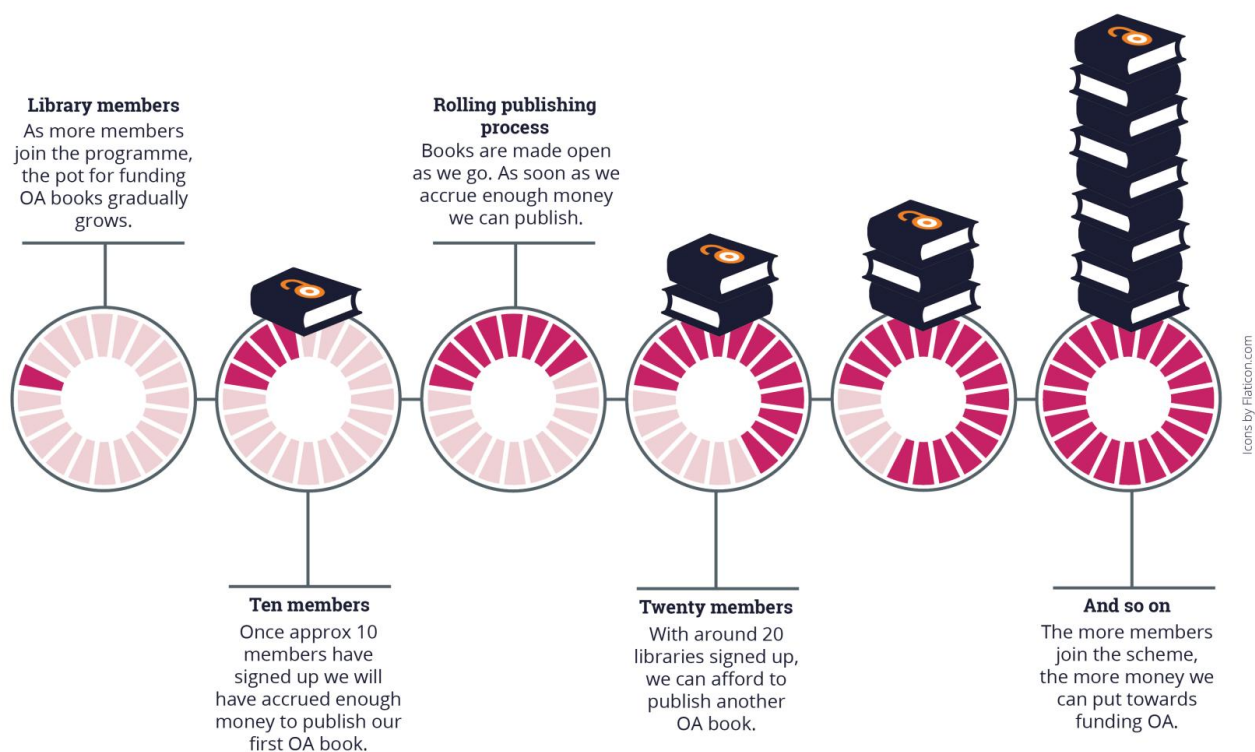
See the later section on licensing and the Shared E-Resource Understanding (SERU) for the easiest path towards licensing of subscription content.

## Delivery of the OA frontlist content funded by OtF

It is imperative that the selection process for open access books be transparent and trustworthy. Libraries fear that publishers will select books for the open access route that they believe will not sell, thereby implicitly devaluing open access.

We recommend that Opening the Future presses adopt a strict chronological hierarchy for the selection of the next open access monograph. In other words, at the moment when sufficient funds have accumulated to make another book open access, the chosen volume should be the book that is next scheduled in the current production schedule, but which hasn't yet been announced as OA vs. non-OA.

The diagram below demonstrates the gradual nature of accruing funds before publishing the next book in the production pipeline. As more members join, frontlist books can gradually be published OA:



**Note:** the OA modelling here is based on an average membership of €800 per year (our medium-size band pricing). Appraising the cost per book/per library is only possible once we've had time to accrue members. This is a pilot project.

If multiple books are on the same production schedule, the Press has latitude to select which book will be OA, but we would urge transparency around this process and for the Press to issue a justificatory statement of the title's worth in such instances.

## Avoid 'Double Dipping'

Your new frontlist titles will likely be at first planned as traditionally-sold 'closed' books. But as soon as you have accrued enough library support through OtF to fund an OA book, you should change the metadata before any sales are made and move the book to an OA status with any distributors too. This needs to happen well before the book is published: we've estimated between 2-3 months is workable. Again, transparency and trust is at the heart of this: if libraries are asked to pay twice through buying a 'closed' copy before it then flips to OA then they will perceive this as double-dipping.

Many OA publishers continue to sell print editions and digital retail editions of their OA books and indeed the **Ithaka S+R Print Revenue and Open Access Monographs Report** from September 2023 (written in collaboration with the Association of University Presses) suggests that "OA titles can generate significant print revenue [and] OA titles can generate meaningful digital

revenue".

- You can read the Ithaka S+R report here <https://doi.org/10.18665/sr.319642>

Take a look at the **Organisational Partnerships** section of this toolkit for details on where you can host and promote your OA books.

## The contents of your backlist packages should not change

Don't be tempted to bait and switch with the backlist package: library members need assurance that they are getting what they originally paid for. Once they have access to a package, don't change its contents or withdraw it unless they cancel. There are also technical considerations around ensuring consistent metadata is delivered to and from Project MUSE.

# Further considerations: licensing and archiving

- **Use CC licencing for the OtF-funded frontlist and a Shared E-Resource Understanding (SERU) to govern library access to the backlist.**
- **Use a reputable host for your OA frontlist (if you do not self-host) who will ensure long-term archiving. We have suggestions on the section on 'Organisational Partnerships'.**

## Frontlist licensing: use Creative Commons

We strongly recommend using an open-access, [Creative Commons](#) licence for front-list open-access content released under the scheme. This is the standard open licence used, and is either mandated or heavily favoured by some funders. The most open version is the '[CC BY](#)' although there are other more restrictive non-commercial and/or non-derivative versions if necessary: this will be dictated by your Press policy.

## Backlist licensing: use SERU where possible

The terms under which the library can use the backlist package also require their own licensing agreement.

While some institutions will require a specific licence, using the [Shared E-Resource Understanding \(SERU\)](#) eliminates much legal wrangling and overhead around licensing while working in a good faith capacity. SERU is not actually a licence, it is a NISO best practice shared understanding governed by copyright law. Because SERU is not a licence, legal terms (such as jurisdiction, warranties, and liabilities) are not used. Rather, the SERU statements describe a set of commonly agreed-upon expectations for using and providing electronic resources. While licences are appropriate in many situations, SERU offers an alternative when both the acquiring institution and the provider are satisfied with this approach.

As the NISO document on SERU describes itself:

*"SERU embodies a desire by publishers and libraries for a cooperative and collaborative relationship that recognizes that the provision of timely, high-quality materials and their protection is in the mutual interests of all parties.*

*SERU offers providers (such as publishers) and acquiring institutions (such as libraries) the opportunity to save both the time and the costs associated with a negotiated and signed licence agreement by agreeing to operate within a framework of shared understanding and good faith."*

Nearly all of our participating libraries have been able to use SERU to govern access to the backlist packages - the couple of libraries that were unable to do so and required a slightly more formal agreement signed a lightweight licence arranged by Lyris, the wording of which mirrored SERU very closely.

In cases where a formal licence is required, the Press must take its own legal advice as to the suitability of any particular clause. However, we recommend that any license provides the following clauses:

- Term access for the first three years;
- Perpetual access after three years' of subscription;
- An open-access, Creative Commons licence for frontlist open access content funded by the scheme.

## Digital Preservation and Perpetual Access

Depending on the specific delivery platform, it may be appropriate to deposit books in third-party platforms, held in trust in case of future Press insolvency. 'Perpetual access' as promised by this programme should also mean perpetual access beyond the lifespan of a press. By using robust, third-party digital preservation systems, presses can provide a higher level of guaranteed availability to libraries.

As a Press you will already have plans and processes in place on digital preservation and there is lots of information available through member societies like OASPA, ALPSP, AUP etc.

- One place to look for further information on OA book preservation is through **Think. Check. Submit.** <https://thinkchecksubmit.org/books-and-chapters/>

# Author and library outreach

Here we detail general outreach. However, direct outreach to libraries that you hope will support you is vital to spreading awareness of your scheme and gaining new support. This section covers suggestions and templates for this sort of direct outreach. This can be done via your authors, by asking them to ask their own institution, and/or by direct library outreach. While author outreach to their own institutions can be extremely important, in our experience, direct outreach to libraries has seen the most impact.

With a model of this kind there is another consideration for library outreach; where there is a clear distinction, do you contact the scholarly communications librarian who may oversee an OA budget, or do you contact the subject librarian relevant to the backlist package you are offering? I.e., are you asking them to invest directly in an open access initiative with a backlist as a sweetener, or are you asking them to purchase books for their collection, with funds that will go towards open access? Ideally you would contact both. Both approaches are outlined below.

# Outreach to former and current authors

**Where possible, ask your authors to undertake outreach to their own library about the model.**

## Outreach to backlist authors

Authors who have published with the press are likely to be among the keenest to ensure its future prosperity. Authors who have previously published with the Press are, therefore, a key outreach point for institutional contact. That said, it is by no means guaranteed that these authors will understand the Opening the Future model or, indeed, have any knowledge of open access publishing in general. There is, for example, no guarantee that authors have heard of book processing charges or arguments why BPCs are not the best way to fund OA books. However, authors can present a very compelling case to the library about possibly avoiding future BPCs if the library pays a much smaller fee to contribute to flipping your Press' frontlist.

Emails to these individuals should:

- Be addressed from a known and trusted figure, such as the acquisitions editor who worked with the author previously.
  - Be specifically actionable. The email should clearly ask the author to reach out to a particular librarian, if possible with a name and contact address.
  - Require as little work on the author's part as possible. Use the below templates to attach the email that you would like the author to send to the library.
  - Be personalised so as not to come across as marketing spam.
  - Comply with all General Data Protection Regulation (GDPR) provisions for opt-out if an author does not wish to hear any more.
1. **For our template email to authors, click here** [☐ ☐ Template outreach email to authors](#)
  2. **For our template email for your authors to send to their libraries, click here** [☐ ☐ Template outreach email from authors to libraries](#)

## Outreach to frontlist authors

The degree of enthusiasm for open access varies hugely between authors. Nonetheless, frontlist authors who are convinced of the merits of OA make for powerful allies. Writing to authors in this category is particularly efficacious, when a work is in production or under contract, as they will often be keen to help the Press to thrive.

Many of the same principles apply as in the above outreach to backlist authors section, except that the relationship here is likely to be warmer and more active. The key is to do as much work on behalf of the academic as possible so that it is easy for them to write to their librarian.

# Outreach to open access or scholarly communications librarians

**OA/scholarly communications librarians may support this model as part of the broader effort to shift the academic landscape towards open research.**

Open access librarians are often extremely savvy and well versed in new models for open access. Given the affordability of Opening the Future and the fact that scholarly communications budgets are often being cut back, this initiative offers a powerful and affordable way for institutions to signal their support for open access books, even when they do not have a great deal of available funding.

One potential point of confusion for this group is that they may misconstrue Opening the Future as a read-and-publish or transformative agreement. That is, they may erroneously believe that they are paying for their authors to publish openly with the press. Communication with librarians in this group must stress the novelty of the approach and that the aim is to reach the entire frontlist becoming OA, thereby avoiding the need for hybrid interim measures.

One of the aims of models like OtF is to try to uncouple the link between a university (library) paying a fee so its own researchers can publish openly. Instead the model endeavours to encourage universities to sustain presses that they value, and that publish work in relevant fields: if BPC-free models like OtF are successful then *any* authors (including their own) who come to those presses with a book proposal will be able to publish OA.

**See also this toolkit's FAQ section on OtF:** [☐ Comprehensive list of OtF FAQs](#)

Key elements of outreach to OA/Schol Comm librarians include:

- Stressing the affordability of the initiative, with particular reference comparison to BPCs.
- Emphasising the need to avoid Book Processing Charges.
- Where accurate and where you have the data to support this, tying the request to authors from the institution without implying that this is a transformative agreement (i.e. showing that authors from the institution are publishing with the Press).
- Tying the request to subject-specific readership/usages (e.g. are there books set on courses at the university that are published by the Press?).
- Stress the relevance of the backlist being offered to their research and/or teaching collections.

- Personalisation so as not to come across as marketing spam.
- Complying with all General Data Protection Regulation (GDPR) provisions for opt-out if a librarian does not wish to hear any more.

In order to find OA librarians who may be sympathetic to a scheme of this sort, there are a few options. One is to research which libraries are participating in other similar collective funding models, or who have advocated for them strongly in forums such as OA webinars or via [Jiscmail](#) such as:

- [oagoodpractice@jiscmail.ac.uk](mailto:oagoodpractice@jiscmail.ac.uk)
- [lis-e-resources@jiscmail.ac.uk](mailto:lis-e-resources@jiscmail.ac.uk)
- [lis-link@jiscmail.ac.uk](mailto:lis-link@jiscmail.ac.uk)

**For a template based on our own outreach to open access / scholarly communications librarians please click here [□□ Template direct outreach to OA or scholarly communications librarians](#)**

# Outreach to acquisitions/collection librarians and using Worldcat data

**Acquisition/collection librarians may wish to participate in OtF in order to enhance their collections in a cost-efficient way (while also supporting open access).**

One of the core goals of the Opening the Future model is to shift from a bifurcated environment where acquisitions budgets are used to buy books, while scholarly communications budgets are used to fund OA, into a more holistic environment in which all acquisitions expenditure contributes to making content open for all. However, at time of writing that shift in library budgets is still a long way off from happening, and outreach needs to take account of this.

When 'selling' the benefits of the Opening the Future model to acquisitions librarians, the focus should be on the unique content that is delivered to each participating library (the backlist). Institutions will often want to see a teaching need for the title or whether faculty have requested a purchase, which can be challenging to demonstrate. Demand-driven acquisition paradigms have also instilled a false belief in the sustainability of on-demand access.

Various data sources, such as Worldcat or Open Syllabus, can help to make the case to acquisitions librarians, although the data can be read in different ways by different institutions. For instance, if Worldcat data indicate that a library has previously purchased every title from a press, some libraries will see this as a good indication that they should join the Opening the Future model as it represents a cheaper way to acquire all new books. Others, though, may question why they should subscribe when they already have all the titles. Hence, data are never neutral and require contextualisation for each library.

- Stress the link between the backlist packages and their own teaching and research aims.
- Focus instead on how this enhances their collections at a low cost, and by acquisition after the three years.
- Stress the affordability of the initiative, with particular reference comparison to BPCs.

In order to find relevant acquisitions/collection librarians, you can use Worldcat or Open Syllabus data, or you can purchase access to subject librarian contact lists from reputable marketers. Alternatively, you can research which universities have a heavy teaching or research focus in the subject you are offering. You may already have strong links to libraries via your current sales activities.

**For a generic template based on our own outreach to acquisitions / collections librarians please click here [☐ Template direct outreach to acquisitions librarians.docx](#)**

# Library consortia

**Library consortia can offer extremely useful financial support, but their processes can be lengthy and complex.**

**You should seek out consortia whose members may already publish (extensively) with you to demonstrate the value of investment.**

Approaching library consortia can be a powerful way to generate multi-library signups and quickly gain many members. CEU Press and Liverpool UP have received important financial support from consortia during our project.

That said, there are a number of aspects to bear in mind with consortial groups:

- Consortial groupings can be slow in their decision making. There are often multiple layers of committees, and budgets can be set up to 12 months in advance. Hence, while the rewards can be great, the lead time for consortial participation can be lengthy.
- Consortial groups are more likely to respond to larger presses with more substantial asks. There is almost a sense that below a certain threshold, it is not worth the time/participation of the big groups. Nevertheless, we have been supported on an individual press level, so while the path to consortial funding may be more difficult and time-consuming, it is feasible.
- Consortia can sometimes be distant from the purchasing process. Speaking directly on the ground with individual acquisitions and scholarly communications librarians can often yield more immediate direct results, although the rewards of landing a large-scale consortial group is key.
- Some library systems act as mini-consortia. The California Digital Library (CDL), for instance, acts on behalf of the California system and is an extremely important player in the US market. Nine libraries of the CDL group are subscribing members of Opening the Future at both Liverpool University Press and CEU Press.
- Some consortia have a large reach as advocates, if not as purchasing schemes. The Center for Research Libraries (CRL) in the USA is a powerful ally who has endorsed the Opening the Future model at the Central European University Press.
- Some libraries are members of multiple consortial groups. Avoiding overlap in pricing calculations and factoring this in during growth predictions is important.
- Being able to demonstrate to consortia that their institutional authors publish with you can be persuasive for gaining support.

Consortia have their own timeframes for applications, as well as different application processes. Some may be appropriate for your press. We have only had discussions with consortia in North America and Canada, which may influence our perspective. As a starting point, several US consortia are listed [on the ICOLC website](#).



# Marketing

**We recommend regularly (e.g. weekly) disseminating news on your platform and social media about new library sign ups and new Otf-funded titles. We also recommend quarterly updates to your library subscribers.**

**If you have the resources, you may want to market at relevant conferences.**

The main focus of your marketing should be libraries. They are your primary 'customer'; it is their financial support that you are seeking, and while one of the main virtues of open access publishing is that anyone can access the publications, it is still likely to be academic libraries that are the primary readers.

We appreciate that marketing can be time-consuming and that as a small press, you don't have unlimited resources to dedicate to this. It is key to market efficiently, rather than to try to market to everyone all the time.

The most effective marketing strategies present potential customers with multiple engagement opportunities. Because of the way that the timescales work in Opening the Future, there are many opportunities to bring the scheme to the attention of libraries.

These points include:

- Launch of the scheme/model
- Every time a library signs up (a press release with a quote from the library in question gives the library the opportunity to signal their support for open publication practices and also allows you to thank them publicly)
- Reaching the revenue threshold for the next book to become open access
- Deciding which next new title will be open access (i.e. declaring the intent for a book to be published openly)
- The publication of an open-access title

Press releases that feature books and authors should be illustrated and eye catching. When launching these announcements via a social media presence, you should 'tag' the associated individuals - whether that is a library or an author - to ensure the broadest spread of material.

All press releases should clearly indicate how libraries can support the model, with as few clicks as possible.

## Regular Marketing Activities

We undertake modest marketing activities about OtF on two different timescales; weekly and quarterly. We attempt to share one piece of news weekly from the category above, about new supporters, renewing supporters or new OA title decisions/publications. We tag the participating libraries and authors where possible in social media posts which boosts visibility to other libraries, OA initiatives/enthusiasts and other interested parties.

Additionally, we created a mailing list of our supporter libraries and send a quarterly update. This can be quite brief, mostly summarising the information above. It may also be worth looking at the usage stats of the OA frontlist funded by OtF (comprehensive and privacy-respecting stats are very easily available if you use OAPEN and [Thoth Hosting](#)) to give the libraries an insight into the impact of the work they have funded.

## Conferences and Events

Examples of conferences where we have tried to market the scheme are in the expandable box below.

### Conference Suggestion List

- Advancing Research Communication and Scholarship (ARCS) Conference
- ALA Annual meeting
- ALPSP conference
- Association of College & Research Libraries (ACRL) conference(s)
- AUPresses Annual Meeting
- Australian Library and Information Association (ALIA) Information Online conference
- Berlin Open Access Conference
- Canadian Association of Research Libraries
- Canadian Library Association (CLA) conference
- Charleston Conference (also Preconference)
- CNI / Jisc library leaders conference
- Conference of Directors of National Libraries of Asia and Oceania (CDNLAO)
- Congress of Southeast Asian Librarians (CONSAL)
- DCDC (RLUK, National Archives & Jisc)
- Electronic Resources and Libraries Conference (EL&R)
- Frankfurt Book Fair
- Geneva Workshop on Innovations in Scholarly Communication
- IFLA / WLIC International Federation of Library Associations
- International Coalition of Library Consortia (ICOLC)
- International Conference on Asia-Pacific Digital Libraries (ICADL)
- LIBER - Association of European Research Libraries
- Library Publishing Forum
- London Book Fair

- Munin Conference
- MUSE Meets conference
- National Acquisitions Group, UK (NAG)
- NISO Plus
- North American Serials Interest Group (NASIG)
- OA Tage/Open Access Days (Germany)
- OASPA conference
- Researcher 2 Reader (R2R)
- RLUK
- SCONUL - UK Society of College, National and University Libraries conference
- UKSG

Note that we have not targeted all of these and that measuring success as a result of the ones we did target has been tricky. Consider this list to be possible suggestions, depending on your resources, and not essential 'must dos'.

If possible, you may also want to market at subject-focussed conferences relevant to the series or list you are applying the model to.

If you have additional marketing resources, you may find relevant suggestions at the Jisc New University Press toolkit [marketing section](#) or the Open Book Collective toolkit [marketing section](#).

# Renewals

- **When the current subscription has a few months left, you should get in touch with the librarian you are already in contact with to discuss renewal.**
- **Renewals may take the form of additional backlist packages, or a supporter package without backlist content.**
- **Despite the extremely difficult financial environment for HEIs, we have seen about 40% of our initial subscribers renew so far, alongside continuing new sign ups. We therefore feel like this is a sustainable model in the short to mid term.**
- **We have also provided a [template email to libraries about renewals](#).**

A natural question for schemes of this sort, and one we get asked quite frequently, is about their sustainability. Questions certainly remain about this in the long-term, if for no other reason than for the fact that all publishers - eventually - reach the end of backlist they have which is viable for packages. At Copim, we have made no secret of the fact that we believe a fundamental and systemic change about how closely library budgets are tied to direct acquisitions is required, with money instead being used to enable OA publishing to the benefit of all.

However, there is good reason to believe that these sorts of models work in the short-to-medium term, and that they will, as more and more publishers use them, becoming a more fixed part of the OA funding landscape. Our confidence in this rests on a few factors.

1. We have continued to accrue new supporters over the whole period from 2020 to late 2024, which increases the pool of potential renewals and also extends it by, at this point, to the period 2027-2030 (as our most recent new members will enter their first renewal period in 2027 and, if they renew for three years, will continue their subscription until 2030).
2. CEUP entered its first renewal period in early 2024 and we therefore have nearly a year of renewal data to work with. Our renewal rate so far has been around 35-40%. While this may not seem very robust, we must look at it in the following context:
  - a. Library budgets are under immense strain right now particularly in the UK, and budget cuts have been the main reason given to us for non-renewals.
  - b. As this model does not work by term access but acquisitions, there is less incentive to renew for this model than for some other collective funding model (the pay-off for this being that the model is able to access acquisition budgets than a temporary access cannot, which is reflected in the amount of money accrued by CEUP and LUP).
3. The landscape of collective OA funding models for books has grown hugely since 2020, and has been adopted by several large commercial publishers and large institutional presses. As they become less experimental and more advocated-for and understood by libraries, we expect more libraries to be willing to, and interested in, engaging with them.

As the subscription is for a three year period, by the end of the second year you are going to want to start thinking about renewals. Your CMS of choice ought to have a running list of when library memberships began so that you can keep track of this time period. We use a spreadsheet which we manually check regularly to see whose memberships are nearing their end point, in order to get in touch about renewals.

There are two main options when it comes to renewal:

1. Creating a new package of your back content to offer them.
2. Creating an 'OA' supporter package which comes with no back content attached to it.

There are pros and cons to each. A massive point in favour of a new package of back content is that it comes with further acquisitions to the library, which are ultimately the main draw for participation. On the other hand, though, it means committing more of your backlist. Theoretically, if it were in a very different subject area, it would also mean that a different librarian at the supporting institution would be responsible for signing it off than the one you originally dealt with, but ideally they would provide internal advocacy to their colleague supporting the acquisition.

The benefit of an OA supporter package is that you do not need to commit more backlist, or go through the work of creating an additional package (i.e. curating the theme, selecting titles). Both of our presses offer an OA supporter package. At CEUP this is in addition to 5 backlist packages. At LUP it is the only alternative to their one original package. CEUP is getting renewals on both additional content packages, and OA supporter packages, but it is also clear that libraries prefer backlist packages where the option is available. As we are only just now at the start of our renewals for LUP (CEUP began earlier this year) we cannot yet say how attractive the OA supporter packages are as the sole renewal option. Additionally, an OA supporter package without content being acquired may have to come out of a different part of the library budget than the initial package, which may add complications, although in our own experience it has not yet.

We have also seen, in reality, that some libraries choose to renew with the same package they originally had despite being aware that this is unnecessary (as they have permanent access after their initial three year subscription), presumably as they would like to keep supporting the programme and this is logistically easier within their administrative structures than opting for a second package.

Once you have decided what your renewal option will be, you should email the librarian you were in touch with originally. You should do this a few months before their current subscription term is due to end. If they have moved role or retired, you should be able to get in touch with the library's general help or contact page to find who their replacement is.

**We have also provided a [template email to libraries about renewals](#).**

# Frequently Asked Questions (FAQs)

This section contains answers to the most frequently asked questions that we encountered in deploying Opening the Future. These FAQs can be used in response to queries about the model or simply to answer these questions if you have them yourself. The numbers in these FAQ responses pertain to the model at the Central European University Press's implementation of Opening the Future. They may be more or less relevant to your own institution, but may in any case provide a helpful jumping off point.

## Why OA and Why Now?

In line with our mission and following all the evidence of expanded readership of our books when OA, we are working with this model because it is the most effective way to reduce costs to libraries and provide equitable access to publishing for authors who do not have BPCs available to them.

We agree on the positive benefits of OA as listed in the [OAPEN Books Toolkit](#):

- Increased readership, usage and citation
- Wider and more diverse audiences
- Real-world impact and public engagement
- Quicker and more lasting impact
- More possibilities for readers to engage with and improve research
- Greater author control
- Compliance with funder mandates

Opening the Future is compliant with funder mandates and most importantly is used alongside BPC funding where available so as not to 'double dip' and only apply library funding for those books that do not have alternative sources of funding.

Most of these FAQs are for librarians, but we urge anyone interested in OA for books to read on.

## Why now when library budgets are under so much pressure?

The Covid pandemic exposed how vital open access is to the future of scholarly communications while also ripping the heart out of the library budgets that can make that transition possible. Opening the Future is designed to be affordable to yield excellent value per book. At an average projected cost of €16.00 per backlist title, €32.00 per frontlist title, or €10.67 per book on aggregate. Whichever way you look at it, Opening the Future provides a good return on library investment.

## What happens if a frontlist title has access to other funding as a BPC from a research grant?

Our policy is to first seek funding from other sources and only if that is not available (which it is still not in most cases) would we apply the funds raised from this project to make books open.

Can this model scale for use by other publishers without inundating libraries with lots of tiny deals?

We hope that with the documented success of Opening the Future we will have a model that could lead to the widespread transition of university presses worldwide to OA.

## What are the key features about Opening the Future that are of interest to librarians?

The model is designed to service different types of libraries.

If you already have most or all of our backlist books it is likely that you would continue to buy our books in the future, but the more we can make OA the fewer books you would need to purchase. On the other hand, if you want a smaller selection of titles for a very economic price, then buying our backlist packages is for you. All the proceeds go to funding the OA frontlist and again this will broaden the range of books for your readers.

You can either purchase the backlist package(s) if your procurement policies require content in exchange for payment, or you can pay through your OA funds. And we offer an 'OA membership' option which comes with no backlist titles but which still helps to fund our open access efforts on the frontlist.

Either way, we are seeing a shift to supporting OA models from acquisitions budgets and we are hoping that this will be the source of support for OA, not only for us, but for all OA initiatives for books. Otherwise it will be impossible to move from pilots to regular practice. Regular revenue like this will greatly ease the way for new initiatives to become established and reliable funding for publishing activities.

## How does Opening the Future help libraries use their budgets efficiently?

Whether you're interested in acquiring additional backlist titles, or if you have them all already and want to support the frontlist going OA, the cost of our programme is very attractive. Our members are banded according to their size, as recognised by Lyris and Jisc, and a three-year subscription for even the highest band library is equivalent to less than an industry average single BPC.

## What is the goal of this model?

Nothing less than to show a route to sustainable and equitable OA for foundational publications in the Humanities and Social Sciences.

We understand that as a small publisher we cannot change the world alone and that the next few years will require adjustments all along the supply chain including the role of intermediaries and aggregators. We are working closely with others to ensure this transition happens.

## Is this like a 'read and publish' deal, but for books?

No, the model is not based on the support of individual titles. If anything it's more like a 'Subscribe to Open' offer. Participating libraries get unlimited, DRM-free access to curated selections of backlist eBooks at a much cheaper price than buying them in print one at a time. The subscription fees are then used to publish new, frontlist books in OA format. It's that simple. There are no BPCs charged. Authors at participating libraries do not get 'preferential' or 'discounted' publishing deals: OA books are chosen on merit, through the normal editorial proposal process and are rigorously peer reviewed. The cost of producing OA books is paid for by the collected library subscription fees: so the more libraries sign up, the more books can be published as OA. If we can get to a fully open frontlist then any authors, including those based at subscribing member institutions, will be able to publish openly with us.

# Can this model scale for use by other publishers without inundating libraries with lots of tiny deals?

We believe that with the documented success of Opening the Future we have a model that could lead to the widespread transition of university and mission-driven presses worldwide to OA. Others, including the Copim Community and the Open Book Collective, are working on reducing the friction of OA publishing through managing and selling funding schemes to libraries.

## Information for librarians

### When will you make frontlist books open access?

All new frontlist titles are at first planned as traditionally-sold 'closed' books. But as soon as we have accrued enough library support to fund a book, we change the metadata before any sales are made and our distributors move the book to an OA status. This happens well before the book is published: so far, we've estimated between 2-3 months. In this way we hope to avoid libraries buying books because their OA status was announced too late.

Please note that GOBI now indicates if a book is available OA and does so as soon as our metadata is changed to OA status. You are still able to purchase print or digital retail editions as usual.

You can keep track of our OA publishing progress by clicking the button below:

### Is this programme open to library consortia deals?

Yes. We've already signed a deal with the California Digital Library (CDL) Consortium and are in discussion with others. We aim to pass on any savings in administration costs to libraries. Please contact us to discuss: [openingthefuture@copim.ac.uk](mailto:openingthefuture@copim.ac.uk)

### What happens if a frontlist title has access to other funding such as a BPC from a research grant?

Our policy is to first seek funding from other sources and only if that is not available would we apply the funds raised from this project to make books open. In this way we are ensuring we do not 'double-dip'.

## How can the Press revenue targets be reached? And what happens if and when they are reached?

If it is not reached, how does the Press decide what will be published OA?

Revenue targets can be reached as more libraries join up. Once we get there we can make more books open access, and we can consult our member community on how else we can support open infrastructures and publishing. We wrote a news piece in early 2024 outlining our planned OA frontlist trajectory, which you can read here: [ceup.openingthefuture.net/news/111/](https://ceup.openingthefuture.net/news/111/)

We have several relevant criteria regarding what titles to make available OA through OTF funding; primarily that the authors want (or need) to publish their monographs OA, and that there is no other funding available. After that, we assign titles in order of publication date, with as much notice to the libraries as possible through our metadata distributions to ensure they are aware of the status change to OA.

## Questions about Signing Up - Money and Conditions

### What do subscribing members get for their money?

Members receive access to packages of 50-200 titles from CEU Press's extensive backlist on Central and East Europe and the former Soviet Union - the history of the region dating back to the middle ages, communism and transitions to democracy (and in some cases backsliding on democracy).

There are five book packages to choose from and each contains titles proven by recent download figures to be popular and current according to data from Project MUSE. One package has been curated by an independent panel of subject expert library colleagues (the 'Librarian Selection'). While not a pick and mix model entirely there is sufficient choice for libraries to select what meets their collection and reader requirements best. The newest package, 'East Meets West' concentrates on Russia, Ukraine and the context of the Full Scale Invasion.

## Do member libraries/institutions have unlimited access to the books in the subscription packages? And what happens at the end of three years?

Member libraries and institutions have unlimited concurrent/simultaneous access to all titles in the package(s) you've subscribed to during the term of your three-year membership. You will be entitled to perpetual access to the package(s) at the end of your three year membership. There is no 'bait and switch' and packages won't suddenly change after you have joined.

## What is the format of the book subscription package and what services are available to members?

The books in the subscription packages are hosted on Project MUSE in their standard DRM-free, unlimited-use model for eBooks. Full-text searching is available across all books and within individual titles. MUSE supports authentication via IP, Shibboleth, and referring URL. Participating libraries can make use of MUSE's Library Dashboard to access MARC records and KBART files customised to their holdings, and retrieve COUNTER 5-compliant usage statistics.

MUSE collaborates with all major library discovery vendors and ensures the packages are set up as collections to be activated in all pertinent discovery services. Books on the MUSE platform are preserved through participation in PORTICO's E-Book Preservation service.

Project MUSE is committed to the accessibility of content and complies with the Americans with Disabilities Act (ADA), in a manner consistent with the Web Accessibility Initiative Web Content Accessibility Guidelines 2.1 AA. They have a full accessibility statement on their website.

## What if we want to access more than one package?

You can sign up to as many packages as you like - simply fill in the form for each package you want access to, or you can contact us if you want to discuss it first.

## If my library doesn't have a discretionary OA budget can we still participate?

Yes, absolutely. Funds from any budget are accepted. In fact, we are hoping that as libraries see this to be a cheaper way of building collections they will pay for this type of offer through their acquisitions budgets.

## How do we sign up and join?

Joining takes about 1 minute by filling in a form with your details and the package(s) you wish to have access to. We will initiate membership and billing when we receive your details.

USA & Canada: Sign up via Lyrasis [supply a quick link or button to take them straight there]

UK: Sign up via Jisc [quick link]

Rest of the World: Sign up via our site [quick link]

## About the Books and Collections

### How have the packages been composed?

The first four packages of 50 titles each have been assembled in different ways. The first covers History and is primarily made up of the most accessed titles on the Project MUSE platform. The second is Political Science, again selected by their subject ranking on Project MUSE. The third (Editors' Choice), selected by the editors at CEU Press, is wider in subject areas and includes gems in literature, such as the Classics list, gender studies, Roma, labour, public health, nationalities, Jewish studies, human rights and more. The fourth is a package made up of titles selected from the other three packages, by a small independent panel of librarians ('Librarian Selection').

The fifth package is the newest. Called East Meets West, it is a collection of books that shed light on the war between Russia and Ukraine.

There is also the opportunity to support the programme even without buying any of the backlist packages. Should you already have all or most of our titles then the OA Supporter membership is for you. For a fraction of the cost of a single typical BPC you will be contributing to reducing your future spend on closed titles as more and more of our frontlist books go open.

### Are there any DRM restrictions on the backlist?

No, all backlist package titles that you are subscribed to are DRM-free and accessible by multiple users simultaneously.

# How are the OA books made available? And how are supporting libraries informed?

The new titles funded by the programme to be published open access are hosted on Project MUSE, JSTOR, OAPEN, ORL and findable via other aggregators such as Proquest, DeGruyter and EBSCO. OA books are available in PDF format with CC BY NC ND licences. Project MUSE supports open access books with MARC records, KBART files, and metadata sharing with major library vendors, to ensure that OA content is widely discoverable through library systems. The books are also listed in DOAB.

You can keep track of our OA publishing progress at: [link to page where you keep up to date information about published and forthcoming OtF titles].

We update our progress page on the website, and issue news items <https://ceup.openingthefuture.net/forthcoming/> as well as send details through listservs. We also include a note of new OA titles in our librarian newsletter, which you should receive as a confirmed customer. All titles get distributed to as wide a network as possible, this includes JSTOR, Project MUSE, DOAB, ORL, ProQuest, EBSCO, De Gruyter etc - this way, if you are set up to receive catalogue data from any of these services, you will get details of our OA titles as well wherever you choose to make them available.

## Do CEU Press books also sell print copies of the OA books?

Yes. All OA titles are available to purchase in print form. Print books can be bought through the normal channels.

## We already own the backlist titles/don't need access to the books, but would still like to support the OA programme. Can we do this?

Yes. We appreciate that some institutions may not wish to sign up to a book package, or may not be able to. However they might still want to support, and help to fund, the open access monographs that CEU Press publishes. For these institutions we have created an 'OA Supporter Membership'. It is simple and quick to join: just fill in the sign up form with your details and we'll do the rest. No further action is required from you once we have processed the payment.

For those institutions that want to commit a larger budget, the OA Supporter Package also comes in 2x and 3x the value per year (equivalent to subscribing to 2 or 3 packages per year).

# About the CEU Press and OtF Partners

## Why do we get invoicing help from partners like Jisc and Lyrasis?

Transitioning to open access is hard and we're in the midst of a transition where we need to accommodate the needs of libraries with a model that is still quite new. We understand that libraries often need to go through extensive deliberations amongst their own stakeholders to see if it is worth investing in our particular offer. As a small press we do not have the resources to talk to every librarian, so we rely on trusted library partners like Lyrasis and Jisc who are already communicating with librarians every day.

## What is Copim and how is it supporting Opening the Future?

Copim is a community of people and organisations working to build a fairer, more open future for scholarly books. Together, they collaborate on community-led and values-driven initiatives, which help to support open access authors, publishers and readers. CEU Press has been provided with assistance in implementing the OtF model through Copim.

## FAQs for Authors

### Is my book eligible for the OtF programme?

Opening the Future is meant to support authors who do not have access to BPCs. Where there is funding from a grant funder or an institution we will use those funds first. Only after these avenues have been explored will we see if your book meets the criteria we've set for our OtF programme. Our acquisitions editors welcome your enquiry and can discuss your own particular situation.

### Is this programme compliant with funder mandates?

Yes. For more detailed information contact us via email at: [add your email] For some general information see the next FAQ.

## What if my research grant insists on OA but doesn't guarantee funding for it – either before or after a book contract is signed?

Funding support for OA is variable and is changing all the time as the move towards making more books OA continues. We are working within the guidelines all the time even as they change, making sure that books get funded. This is the case, for example with the new UKRI rules where there is some funding, but not enough to cover all book outputs from grant supported researchers. Talk with one of our acquisitions editors for more information.

## I'm not sure about going open access for my book. Can it remain closed if I publish with you?

Yes, it can remain closed – but we'd like to discuss with you whether this is the best way to publish your book. At the moment we don't have sufficient funding to cover all books going OA, and while that is our aspiration, we would not force anyone to go OA - the final choice is with the author.

## Do you apply the same peer review process to your OA books as closed ones?

Yes, we do. In fact all the publishing processes are identical, with the same promotional activities as well as making print editions available. For more information see our OA page for authors: [insert your webpage link here]

## My University is a member of Opening the Future with CEU Press. Does this mean I can publish OA books with you without need for funding?

There is no linkage between an institution supporting our programme and their own authors being allowed to publish OA. Authors at member institutions do not get 'preferential' or 'discounted' publishing deals: OA books are chosen on merit, through the normal editorial proposal process and are peer reviewed. Authors are always welcome to submit a monograph proposal through our normal process but membership of Opening the Future is not a factor in the editorial or acceptance process.

# Is this a 'read and publish deal' or a transformative agreement?

Opening the Future is not like a 'transformative agreement' in the journal world. There is no linkage between an institution supporting the model and their own authors being allowed to publish OA, and it's not based on the support of individual titles. If anything it's more like a 'Subscribe to Open' offer. Participating libraries get unlimited access to curated selections of backlist eBooks at a much cheaper price than buying them in print one at a time. The subscription fees are then used to publish new OA books.

In a sense, the programme is trying to break the link between institutions paying and their own authors being allowed to publish openly, in favour of the press securing a 100% open frontlist and so achieving the former by default. It's perhaps better thought of as an attempt to build an open, global 'collection' that is shared by libraries in common, around the world. There are no BPCs charged, and authors at participating institutions do not get 'preferential' or 'discounted' publishing deals: OA books are chosen on merit through the normal editorial proposal process and are peer reviewed. The cost of producing OA books is paid for by the collected library subscription fees: the more libraries sign up, the more OA books can be published.

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