Project PALOMERA

Policy Alignment of Open Access Monographs in the European Research Area

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EUA webinar series: The future of scholarly communication

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PALOMERA

Policy Alignment of Open Access Monographs in the European Research Area

In a nutshell, PALOMERA seeks to understand why so few open access funder policies include books, and to provide actionable recommendations to change this.

Key facts

- Funded by HORIZON Europe as part of the call: Reforming and Enhancing the European R&I System (https://cordis.europa.eu/project/id/101094270)
- 16 members and partners from across Europe
- Runs from January 2023 to December 2024
- Co-led by OPERAS

Members

OPERAS (Coordinator) - Belgium
OAPEN – Netherlands
Hanken School of Economics – Finland
IBL PAN – Poland
LIBER – Netherlands
University of Coimbra – Portugal
DARIAH – France
European Science Foundation – France
ZRC Sazu – Slovenia
SPARC Europe – Netherlands
Bielefeld University – Germany
Georg-August-Universität Göttingen – Germany
OASPA – Netherlands
Aix-Marseille Université – France

Partners

JISC – United Kingdom
Open Book Publishers – United Kingdom

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Aims of PALOMERA

- **Improve the understanding** of the current landscape of scientific book and monograph publishing in different fields of research, and in particular the **bottlenecks in strategies and policies** for facilitating open access to books.

- **Support aligned funder and institutional policies** for open access monographs and books within the European Research Area and facilitate their coordination.

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PALOMERA stakeholders

PALOMERA has conducted various activities throughout the project to gather evidence, feedback and foster engagement from each major stakeholder group

- ➔ **Research funding organisations**
- ➔ **Research performing organisations**
- ➔ National science policy-makers
- ➔ Publishers
- ➔ Scholarly societies
- ➔ Infrastructure providers
- ➔ Libraries
- ➔ Researchers

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Outputs

- ✓ Knowledge Base on the OA book funding and policy landscape as an extension of the OAPEN OA Books Toolkit
- ✓ Report covering the results of the analysis
- ✓ Actionable and evidence-based recommendations & Funder Forum & Policy Development Tool concept
- ✓ Increased engagement around OA books through validation events and OA Books Network
- ✓ Engagement with international research funders

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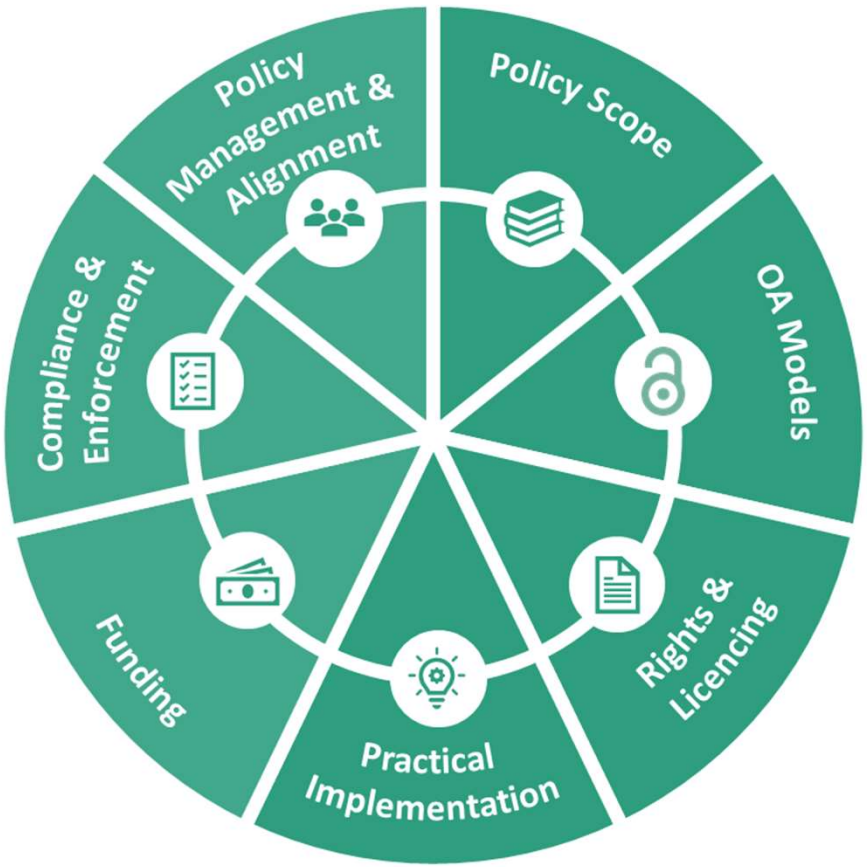
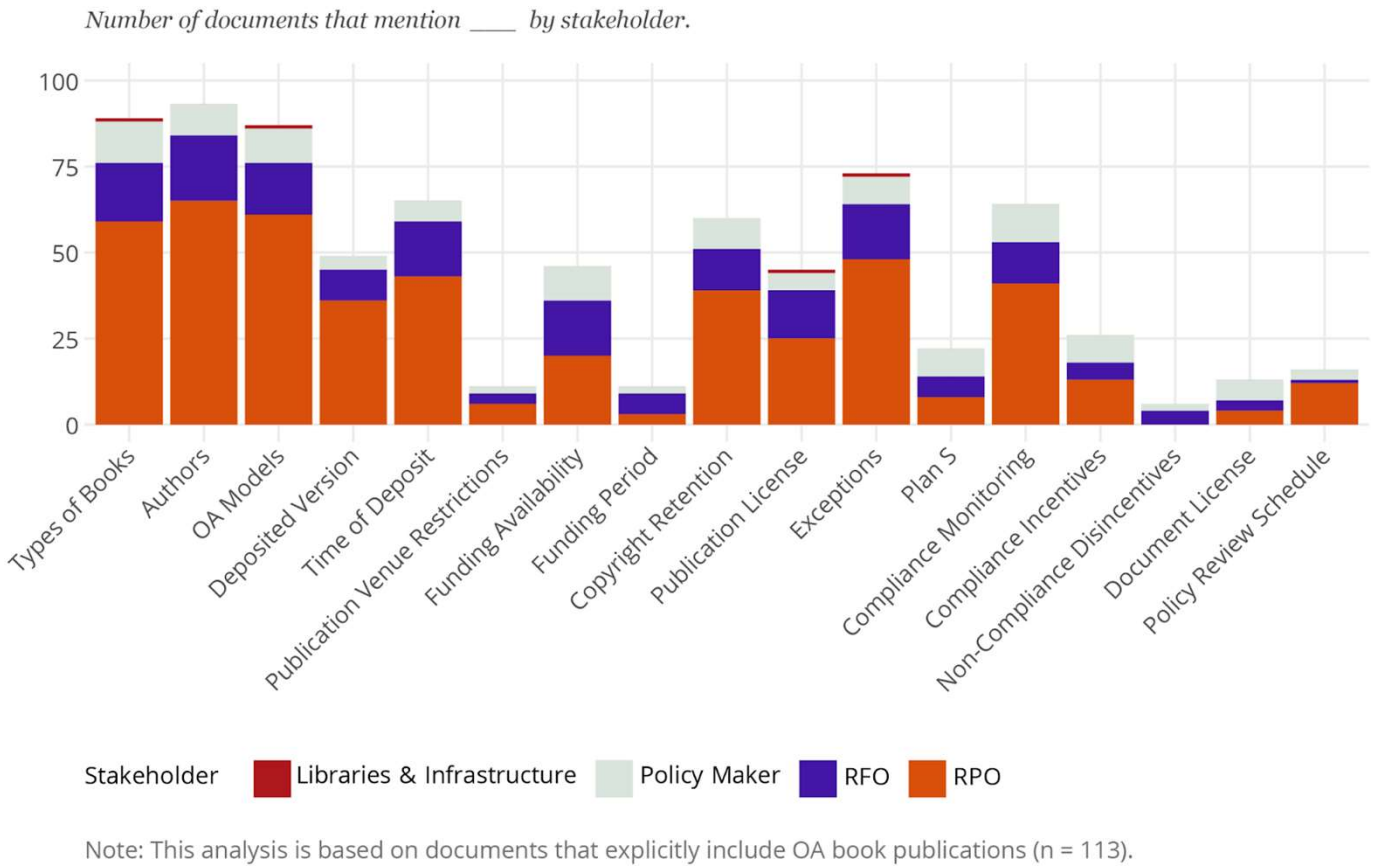


Existing open access policies were studied through a systemic lens

- 247 OA policies were coded/mapped for the presence or absence of 17 “policy elements”.
- For the 113 policies that specifically addressed books, text excerpts were collected and analysed in detail to gain deeper insights into the nuances of OA book policies.

Just a quick look at what the data policy mapping looks like so you get an idea



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The PALOMERA recommendations for Open Access academic books

Recommendations that are:

- Evidence based
- Aligned across stakeholders
- Actionable

Evidence based recommendations:

- 650 policy and policy-related documents of 39 ERA countries
- over 40 anonymised interviews with stakeholders from across the ERA
- Broad literature review

The PALOMERA methodology

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The PALOMERA recommendations for Open Access academic books

Recommendations that are **aligned across stakeholders** and thus allow for complementary OA academic book policies

Stakeholder engagement events revealed a lack of policy alignment between stakeholders

Practical, structured recommendations that distinguish between **general** recommendations and **stakeholder-specific** ones

The PALOMERA methodology

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The PALOMERA recommendations for Open Access academic books

Recommendation #1:
Address OA academic books specifically in OA policies

Recommendation #2:
Use simple language in OA academic book policies

Recommendation #3:
Raise awareness about OA academic books at all levels

Recommendation #4:
Consider funding mechanisms for OA books that do not involve BPCs.

Recommendation #5:
Engage in collaboration with related stakeholders

General recommendations

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The PALOMERA recommendations for Open Access academic books

Recommendation #1:
Incorporate existing policies about OA academic books into institutional action plans that are publicly available and monitored for compliance.

Recommendation #2:
Raise institutional awareness about OA academic book publication.

Recommendation #3:
Ensure that the missions of affiliated academic publishers are aligned with the OA policies of their institution.

Recommendation #4:
Include metadata in institutional research services and research output documentation

Recommendations for Research Performing Organizations (RPOs)

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Summary & what is still ahead in the project

- We argue to have the **most comprehensive and up-to-date materials available to describe the OA book policy landscape in the ERA countries**, The most important parts can easily be re-used and extended by anyone as part of future work

- **The PALOMERA Conference** 28-29 October 2024, online and in-person i Ljubljana, Slovenia https://operas-eu.org/projects/palomera/palomera-conference/

- **Analysis report, reccomendations document, and extended OA Book Toolkit will all be available in October, and you will get a notification e-mail about it**

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