

EIFL DIAMOND OA SUSTAINABILITY PLANNING PROGRAMME

Financial sustainability planning toolkit for Diamond Open Access journals

A working companion for editorial teams planning the financial future of their journal over the next three years

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01
About this toolkit

This toolkit is a working companion for the editors, editorial teams and host-institution colleagues who run African Diamond Open Access journals, and for the librarians, faculty advocates and institutional sponsors who support them. It was developed with EIFL grantee journals in Kenya, Tanzania, Togo, Ethiopia and Ghana through the EIFL Diamond OA sustainability planning programme. Its focus is the **financial dimension of sustainability planning**: how to set out what your journal costs to run, where the resources will come from, and how to make the case to those who can support you over the next three years.

Who you are writing this plan for

Your sustainability plan will be read by several audiences. Each will want to see something slightly different.

Your parent institution

Usually the host university or library. Wants to see the in-kind support it already gives, the cash being asked for, and how the journal serves its strategy.

Programme and project funders

Funders of time-limited programmes and projects. Will look for evidence that the journal can stand on its own once their grant ends.

National and regional research funders, and potential donors

Need the case made in terms that a funder unfamiliar with your journal will recognise.

Your own editorial community

Needs a shared understanding of what the journal costs, what it depends on, and what each person is committing to.

What it does

The toolkit translates good practice in Diamond OA financial sustainability into questions you can ask of your own journal, criteria you can measure your plan against, and prompts for the things that are most often missed. **It does not tell you what your plan should say.** Your context, your community and your judgement do that. The toolkit helps you make sure your plan is complete and credible.

The financial sustainability template sits alongside the toolkit, together with a worked example of the template completed for an illustrative journal; the toolkit and template are designed to be used together.

How to use it

Use the toolkit as you draft your plan, return to it when you revise, and pick up the sections that are relevant to where you are.

THIS PLAN HAS TO BE YOURS

A sustainability plan written for a journal by someone outside it, whether a consultant, a funder or a colleague at another institution, rarely survives contact with the year ahead. The people who will carry out the actions need to be the people who decided on them. Use external advice, templates and peer review to test your thinking, but **write the plan yourselves**, so the editorial team and host institution own both the commitments and the follow-through.

Making the shift to multi-year planning

Most editorial teams plan year to year: how many issues to publish, who will handle submissions, and whether the budget covers immediate costs. A sustainability plan asks instead **what you want your journal to look like in three years' time, and what it will take to get there.** The shift has three practical dimensions.

From activity to strategy

Annual plans describe what you will do. A sustainability plan explains why, and which choices will get you there: whether you spend the next twelve months building an institutional relationship, developing a new funding stream, or reducing dependence on a single supporter.

From approximation to specificity

Rough estimates of costs and income may do for one year, but over three years the gaps compound. The financial sustainability template asks you to name the providers of in-kind support, state the hours they contribute, and identify which funding streams you expect to activate, and in which year.

From single-track to scenarios

A multi-year plan needs at least two versions: a **base case** (your best realistic expectation) and a **contingency** (what happens if your largest source of support reduces or stops). Building both now means you have a plan ready if the contingency occurs, rather than improvising when it does.

A PRACTICAL STARTING POINT

Take your current annual costs and income, make in-kind contributions visible, and ask of each funding source: **is this committed, probable or possible for each of the next three years?** The answers will show where your plan is robust and where it is fragile.

Sustainability is more than finances

Recent work on sustaining African Diamond OA journals by Kwanya and Ateka (2026), drawing on an EIFL grantee journal, shows that sustainability rests on **four interdependent pillars**:

Financial sustainability

Stable and diversified resources, projected over multiple years

THE FOCUS OF THIS TOOLKIT

Knowledge equity

Open licensing, multilingualism, inclusive editorial practices, bibliodiversity

Community engagement

Author, reviewer and reader communities; editorial workforce; succession

Technology and innovation

Publishing platform, persistent identifiers, preservation, metadata

As they put it, sustainability "must be understood as a multidimensional construct that goes beyond financial resources to include human, technological, and social capital".

This toolkit addresses only the financial pillar, where journals have asked for most direct support and where practical guidance for the African Diamond OA context is scarcest. The other three pillars still create risks to a financial plan, so your plan should answer three questions:

- **Editorial capacity:** what happens if a key editor leaves? Keep reviewer records in OJS, not personal email.
- **Technology:** what would a platform migration or loss of support cost?
- **Visibility:** what is your indexing roadmap, and what does it cost?

02
A credibility checklist

Funders, parent institutions and partner organisations reading your sustainability plan will look for a small number of signals that tell them the financial side is well-grounded. Use this list as a destination map for your plan and as a self-check before you share it.

A credible Diamond OA financial sustainability plan will:

COSTS

1. Set out year-by-year costs for the next three years, in cash and in-kind
2. Make in-kind contributions explicit, with named providers where appropriate, estimated hours, an indicative value, and the dependencies that would be hardest to replace
3. Explain how costs scale with article volume and what the planning assumptions are
4. Describe the cost-optimisation measures already in place or planned (shared infrastructure, FOSS tools, institutional licences, free training), so the cash being asked for is for what the journal genuinely cannot do without

FUNDING

5. Identify multiple funding sources, sequenced and prioritised, with each marked committed, probable or possible
6. Set a diversification target by year three: no single source providing more than 60–70% of cash income, and at least two distinct funding streams
7. Set out a contingency for the loss of the largest single funding source
8. Safeguard editorial independence for every non-traditional income stream, for example through a published advertising policy, an editor-led veto over sponsored-issue topics and an annual review of mission against income mix

THE PLAN ITSELF

9. Articulate the journal's mission and audience clearly
10. Confirm Diamond status: no APCs, no submission fees, no reader paywall
11. Treat the financial model as a distinct part of the plan, not a by-product of editorial quality, indexing or governance
12. Distinguish strategy from action plan, and connect the two
13. Be owned by the journal: drafted by the editorial team, with a named owner for every action
14. Acknowledge the risks to the financial plan from the other three pillars (succession, technology, visibility)

A plan that is silent on in-kind contributions, multi-year projection, contingency or diversification will read as incomplete to most funders, regardless of how strong it is elsewhere.

03
Costs

A credible cost picture covers everything that goes into running the journal, whether it is currently paid for in cash or contributed in kind, and projects forward over three years. This section sets out what to include, how to make in-kind contributions visible, and how to think about multi-year projection.

What to include

Drawing on the EIFL/DIAMAS *Optimise your operations* guide (Ševkušić, 2025), EIFL's expense categories template and the experience of the journals we have worked with, the costs to consider fall into **eleven groups**. Some will be substantial for your journal and some small or zero, but each is worth a deliberate decision rather than an omission.

GROUP	TYPICAL ITEMS	USUALLY CASH OR IN-KIND?	FIXED OR VARIABLE?
People	Editor-in-chief, section and associate editors, editorial assistants, copyeditors, peer reviewers, IT and administrative support. Usually the largest group once in-kind labour is counted	Mostly in-kind or voluntary; some cash (honoraria, paid staff)	Mostly fixed; review effort rises with volume
Per-article production	Copyediting, typesetting, layout, XML or JATS conversion, plagiarism checks, translation for multilingual publishing	Cash or in-kind	Variable
Platform and infrastructure	Hosting, OJS support and maintenance, upgrades, backups and security, whether self-hosted, institution- or NREN-hosted, or SaaS	Often in-kind; cash for SaaS or outsourced support	Usually fixed; may be per-article on commercial hosts
Persistent identifiers and preservation	DOIs via Crossref (directly, through a national sponsor or through AJOL), other PIDs, and preservation via PKP Preservation Network, JASPER, CLOCKSS or an institutional arrangement. Several are free or low-cost for Diamond OA journals	Cash, often low	DOIs variable; preservation fixed
Software and tools	Plagiarism detection (iThenticate or Turnitin, often via an institutional licence), citation tracking, productivity software. FOSS alternatives exist for most	Cash or institutional licence	Fixed
Visibility, indexing and discoverability	Search engine optimisation, indexing applications and renewals, website content, social media, outreach, citation monitoring	Mostly in-kind	Fixed

GROUP	TYPICAL ITEMS	USUALLY CASH OR IN-KIND?	FIXED OR VARIABLE?
Internationalisation and conferences	Conference attendance, presenting the journal at scholarly events, partnership meetings, travel and subsistence	Cash	Fixed
Training and capacity building	Editorial and technical training, reviewer development, mentoring. Free resources include the OA Journals Toolkit, INASP and the European Diamond Capacity Hub (EDCH) Training Platform (training.edch.eu)	In-kind or cash	Fixed
Memberships and subscriptions	OASPA, COPE, DOAJ supporter membership, editorial databases. Many offer discounts or waivers for lower-income countries	Cash	Fixed
Premises, equipment and communications	Attributable office space, computers and IT equipment, internet and telecoms	Usually in kind from the host institution	Fixed
Legal and professional services	Copyright and licensing advice, accountancy and audit, bank charges, insurance	Cash, usually small	Fixed

Separating **fixed costs** from **variable costs** is the basis of any credible projection. Hosting, domain registration, OJS hosting and support, memberships and the minimum staff time needed to keep the journal running usually change little whether you publish 20 articles a year or 60 (though some commercial hosting services, such as Scholastica, charge per article). Per-article production costs (copyediting, typesetting, plagiarism checks, DOI registration) rise with every article. If you plan to grow, model the effect: a journal that doubles its output without matching resource for its variable costs will face quality pressures, delays and reviewer fatigue. Use the financial sustainability template to build a growth scenario alongside your base case: **what would it cost to publish 50% more articles next year, and where would that resource come from?**

Make in-kind contributions visible

African Diamond OA journals run substantially on labour and infrastructure that appears in no cash budget: editor time donated by a university, office space provided by a host institution, peer review undertaken without payment. These are real costs of running the journal, and treating them as zero misleads both you and potential funders. It is also the norm across the sector: a 2026 analysis of 235 African Diamond OA journals found that **48% rely on direct institutional support** (Ndege and Harle, 2026), close to EIFL's own survey finding of 45.7% (EIFL, 2024). There are three reasons to make in-kind contributions visible:

- **It shows the real cost.** An honest cost picture shows what it costs to run the journal, not the cost net of unpaid labour, and funders are far more likely to commit when they can see what their contribution is being added to.
- **It surfaces risk.** An editor doing 15 hours a week of uncompensated work is a sustainability risk, not a sustainability feature.
- **It builds the case for recognition.** Valuing the labour explicitly is the first step towards recognising it through promotion criteria, course release time or formal compensation.

To make in-kind contributions visible in your plan:

- **Estimate the hours** per week or per year that your editorial team, reviewers and production staff contribute. As a working guide, treat an active editor-in-chief role as 8–15 hours a week (0.2–0.4 FTE), a section or associate editor as 2–5 hours a week, and reviewer effort as 2–8 hours per submission.[1]
- **Attach an indicative cost.** Use local academic salary rates where the work is done by faculty, and local scholarly editorial rates for outsourced production work.
- **Identify what your host institution provides in kind:** office space, equipment, IT support, staff time at no cost to the journal. You usually do not need to put a formal value on these non-labour contributions; noting what is provided, and by whom, is enough in most cases. Concentrate your valuation on donated time, which is almost always the largest in-kind cost.
- **Name the providers** of in-kind contributions where appropriate, and note any formal agreements.
- **Flag the in-kind dependencies** that would be hardest to replace if they were withdrawn.

The TEAM TIME tab in the financial sustainability template records in-kind and volunteer contributions. **Treat it as a required field, not an optional one.**

[1] Note: the working time anchors are indicative global averages drawn from published research and practitioner experience. Africa-specific benchmarks are not yet widely documented in the literature, but EIFL programme experience suggests they are broadly consistent with what African Diamond OA editorial teams report in practice. Treat them as starting points for your own estimates, not as prescriptions.

WORKED EXAMPLE

Valuing in-kind contributions

The following example shows how to translate time into a financial value for a single role. Apply the same method to every contributor whose time is not paid in cash.

An editor-in-chief estimates she spends eight hours a week on journal work, for 44 weeks a year.

Hours per year	Local hourly rate	Annual in-kind value
8 × 44	Professor-level, East Africa	352 × $18
352 hours	**$18 / hour**	**$6,336**

This single contribution, which appears nowhere in the journal's cash accounts, may well exceed the journal's cash income. Making it visible transforms how funders, institutions and reviewers understand the journal's financial position.

Multi-year projection

A credible cost picture projects three years out, not one. Project forward even where the picture is uncertain, and state your assumptions plainly. A useful three-year projection will show:

- How costs change as article volume changes, on whatever growth assumption is realistic for your journal
- How in-kind contributions might shift over time, for example an editor moving from uncompensated work towards course-release time as recognition improves
- How prices may change through inflation, platform fees or currency exchange where you operate across currencies
- One-off versus recurring costs: a DOI registration set-up may be a year-one expense, while hosting recurs

HOW MUCH DOES A JOURNAL COST?

Programme experience suggests that most journals in the EIFL programme are moving from a baseline of roughly **$0–$1,000 a year in cash support towards $10,000 a year** over the planning horizon.

Independent analysis of African Diamond OA journals points to a broadly comparable scale: a minimum operational baseline of about **$3,200–$3,300 per journal per year** for essential production (hosting, layout and copyediting), rising to about **$6,500** for a model that also supports basic editorial and administrative work (Ndege and Harle, 2026).

Both figures exclude the value of unpaid editorial and peer-review labour, so they sit alongside the in-kind picture above, not instead of it. Your own figure will depend on your article volume, your in-kind position and what your host institution can absorb.

Optimising costs

Diamond OA journals can keep costs down without compromising quality by being deliberate about cost optimisation. Several techniques are already in active use among African Diamond OA journals:

- **Free and open-source platforms.** Open Journal Systems (OJS) for editorial workflow, peer review and publication; FOSS alternatives to commercial productivity tools where adequate. Reduces both upfront and recurring software cost.
- **Shared infrastructure.** Multi-journal OJS instances hosted by the parent university or library, NREN hosting at no or subsidised cost, partnerships with sister journals to share technical support. Reduces per-journal infrastructure cost substantially.
- **Institutional licences for plagiarism detection.** Using iThenticate or Turnitin via an existing institutional licence rather than a journal-specific subscription typically reduces this cost to near zero.

- **XML-first and automated workflows.** Producing XML or JATS at the manuscript stage simplifies downstream indexing, preservation and metadata work. Routine tasks like reference checks and basic copyediting can be partly automated with free tools.
- **Digital-only operations.** Avoiding print runs and physical distribution eliminates a substantial cost line and is consistent with Diamond OA principles.
- **Multitasking and student involvement.** Editorial assistants taking on social media or community management; graduate students contributing to editorial work for credit. Reduces the need for specialist recruitment and can be a valuable training opportunity, but should be paired with recognition.

Cost optimisation is not a substitute for funding. A journal that has minimised its cash costs as far as it sensibly can will still need a sustainable funding base for what remains. But describing the optimisations you have made and intend to make is part of a credible plan: it shows the funder that the cash being asked for is for work the journal cannot do without.

04
Funding

Diamond OA means no fees for authors and no paywall for readers. The funding sources available to Diamond OA journals are therefore narrower than for other publishing models, but they are not few. This section sets out the Diamond-compatible options, then how to sequence and prioritise them, how to diversify, and how to plan for contingency.

Diamond-compatible funding sources

Drawing on the PKP Sustainability Models taxonomy, the EIFL landscape study of no-fee open access publishing in Africa, and the strategies of the journals we have worked with, Diamond-compatible funding falls into **thirteen categories**. Most journals will combine three or four.

Institutional support is the most common foundation for African Diamond OA journals, and usually the most stable. A credible plan describes both what is currently provided and what is being asked for, ideally backed by a dedicated journal budget line and a multi-year commitment rather than annual renewal.

The sources flagged INDEPENDENCE SAFEGUARD need explicit protection of editorial independence (see checklist item 8).

SOURCE	WHAT IT IS	BEST USED FOR	MATURITY
Institutional support	Host university, library or learned society providing cash, in-kind support or both	Core costs	Established
Public funding	Research-funder grants (national research funders such as NRF Kenya and NRF South Africa; Wellcome; EU programmes), government allocations, and intergovernmental support (UNESCO, African Union). Usually time-limited	Projects, set-up and capacity building	Established
Cultural heritage and thematic grants	National cultural ministries and heritage or language-preservation funders supporting indigenous knowledge and cultural documentation	Projects	Emerging
Philanthropic and donor contributions	Foundations (e.g. Mellon, Ford, Carnegie), charitable donors and major individual gifts	Projects	Established
Alumni and diaspora networks	Small recurring or one-off donations from alumni; diaspora researchers as donors, reviewers, guest editors or mentors	Projects; small core contributions	Emerging

SOURCE	WHAT IT IS	BEST USED FOR	MATURITY
Membership and supporter models	Institutions or societies paying to be associated with the journal, or official-journal status with a share of a professional association's membership fees	Core costs	Established
Cooperative funding	Two or more institutions (universities, libraries or a national consortium) jointly funding a journal or a shared publishing platform, often where a learned-society journal serves several institutions' communities. Examples include SAJChem and SAJOT, and Global Africa's research consortium (Chekole et al., 2026)	Core costs	Emerging
Sponsored special issues and guest-editor fees INDEPENDENCE SAFEGUARD	Sponsors funding themed issues or conferences aligned with the journal's scope; guest editors bringing production fees from their organisation	Projects	Emerging
Ethical advertising INDEPENDENCE SAFEGUARD	Website and social-media space for relevant academic programmes, conferences, jobs, books, scholarships and fellowships	Modest core contribution	Emerging
Income-generating activities INDEPENDENCE SAFEGUARD	Value-added services such as consultancy, training, edited volumes, copyediting and typesetting, journal set-up support, bibliometric services and event management	Core costs and projects	Emerging
Endowments and long-term reserves	An invested fund built from major gifts, legacies, consortium contributions or surpluses, whose returns support operations	Core costs	Longer-term
Community donations and crowdfunding	A donate button on the journal website, and campaigns for specific projects such as a themed issue or a translation effort	Projects	Established
Social enterprise INDEPENDENCE SAFEGUARD	A commercial arm that cross-subsidises the journal (e.g. a research analytics platform, industry reports, premium support for FOSS tools), with separate editorial and enterprise teams	Core costs	Longer-term

IMPORTANT NOTE

Every activity-based income stream (sponsored issues, proceedings, advertising, consultancy, training) needs staff time your journal may not have. Before pursuing one, estimate the in-kind cost to your team using the valuation method in section 03, and check that the income justifies it. A sponsored issue needing 60 extra hours of coordination, at a fee that covers only production costs, can leave the team worse off than a regular issue.

Price to cover your real costs, not just your cash outlay.

Sequencing and prioritisation

A common pattern in early-draft plans is the "shopping list": for example, ten potential income streams running in parallel, with no signal of which comes first, what each costs to set up, or what is realistic in year one. **The fix is not to remove options but to sequence and prioritise them.**

A credible version might secure a multi-year institutional subsidy in year one, develop alumni and learned-society contributions in year two, and treat membership models or external grants as upside from year three. The shopping list becomes a phased roadmap.

For each funding source, your plan should distinguish:

Committed
Secured, with timing and amount confirmed

Probable
Strongly indicated, awaiting formal confirmation

Possible
Credible target but not yet engaged

Diversification and contingency

A plan built around a single funding stream is fragile, even where that stream is currently secure. A reasonable diversification target is **at least two distinct funding streams by year three, with no single source providing more than 60–70% of total cash income.** Your plan should also address what happens if your largest single source withdraws.

A contingency plan should do three specific things: name the funding source at risk; estimate the cash and in-kind gap that its loss would create in each of the three planning years; and identify which activities you would reduce, defer or eliminate first, and in what sequence. Build this scenario into your financial sustainability template alongside your base case.

NOT A PLAN

'We would seek alternative funding.'

ACTIONABLE

'We would suspend international conference participation, reduce to one issue per year, and prioritise securing institutional salary support for the managing editor within six months.'

Third-party publishing services

Some journals are asked to provide publishing services to other organisations, such as hosting externally owned journals, publishing conference proceedings or producing books of abstracts. This is a legitimate source of income, compatible with Diamond OA status provided it is kept clearly distinct from your own Diamond OA journal, and any non-Diamond title you host is managed and presented entirely separately.

Two principles should underpin your pricing: **allocate a fair share of your existing fixed costs** to each journal you serve (see section 06, "Shared infrastructure"), and **value your staff time in full** at the rates you use for your own in-kind contributions (see the Important note above). Under-pricing means cross-subsidising the client from your own reserves or your team's capacity.

05
Strategy and action plan

A credible sustainability plan distinguishes strategy from action plan and connects the two.

A strategy

Sets out where your journal is going and why. It states the journal's mission, the scale you aim to operate at over three years, the funding model you will pursue, and the principles that constrain your choices (Diamond status, editorial independence, open licensing).

An action plan

Sets out who does what, by when, with which resources. It translates the strategy into concrete steps, each with a named owner.

Both are needed. **Strategy without action is aspiration; action without strategy is busywork.** Your plan should make the connection between the two visible: every strategic intent should map to at least one concrete action, and every action should serve a stated strategic aim.

A template structure for your strategy

A credible plan connects one thing to the next: **what you aim to do → what it costs → where the money comes from → who does what → what could go wrong → how to tell if you're on track.** The structure below follows that chain.

1 Context: the journal today
Mission, scope and real numbers: submissions, articles per year, current indexing arrangements.

2 Vision and objectives
A small number of realistic aims over three years.

3 What it costs to run
Cash and in-kind; fixed and variable; the operating cost, not just projects.

4 Resources and funding
What you have and expect, marked committed, probable or possible.

5 Sustainability strategy
Prioritised and sequenced; built around institutional funding; a diversification target; a contingency.

6 Action plan
Who does what, by when, at what cost: phased, not all at once.

7 Risks and mitigation
Tied to each objective, specific, with an owner.

8 Monitoring and review
Indicators with a baseline and a target; a review date.

A simple action-plan format

Set the action plan out as a table, so that every action carries a named owner, a deadline, the resources it needs and the strategic aim it serves. **An action without a named owner from the journal or host institution is not yet an action.**

ACTION	OWNER	BY WHEN	RESOURCES	STRATEGIC AIM
Approach the dean with a proposal for a three-year institutional subsidy	Editor-in-chief	31 July	Draft proposal; completed financial sustainability template	Secure a multi-year institutional foundation
Register the journal with DOAJ	Editorial assistant	30 September	Around 10 hours of staff time	Increase visibility and submissions
Provide course release time for the section editors	Host institution (dean's office)	From January	Course release for two section editors	Reduce reliance on uncompensated labour

Example entries are illustrative. Add one row per action, and check that every strategic aim in your plan has at least one row against it.

06
Planning for a portfolio of journals

This toolkit is written primarily for teams managing a single journal. Several institutions manage multiple journals (in some cases ten or more) and face a different challenge: developing a sustainability framework that applies across publications at very different stages of development. The principles in this toolkit apply to each journal individually, but a portfolio approach has additional dimensions.

Shared infrastructure: allocate costs, do not absorb them

Where multiple journals share a platform, OJS installation, hosting arrangement or editorial management team, the cost of that shared infrastructure should be allocated across all the journals that use it, not attributed to one journal or treated as a general institutional overhead. The method: estimate the total annual cost of the shared resource, and divide it proportionally across journals by a fair measure such as article volume, number of issues or staff time consumed. This makes each journal's true cost visible, which is essential for sustainability planning and for pricing third-party publishing services (see section 04).

Differentiated strategies for journals at different stages

Journals at different stages of development need different priorities. A recently launched journal may need to focus on securing institutional commitment and making in-kind costs visible; an established journal with a stable funding base may be ready to diversify its income. A single approach applied across ten journals at different stages will serve none of them well. **The framework should be tiered:** a common set of principles and tools, with differentiated priorities and timelines for each journal.

A portfolio-level sustainability statement

Even where each journal needs its own plan, the institution should be able to state its portfolio-level position: the total annual cost of publishing these journals, the total value of in-kind contributions, and the institution's commitment to sustaining them. This is powerful when seeking external funding or institutional recognition, because it presents scholarly publishing not as a collection of individual editorial projects but as **an institutional investment in knowledge infrastructure.**

Prioritisation when resources are constrained

A portfolio approach requires honest decisions about which journals are priorities if institutional resources are limited. Which are most strategically important to the institution? Which have the strongest path to financial sustainability? Which carry the greatest risk of closure? Making these judgements explicitly, and recording them in the plan, is more sustainable than spreading limited resources thinly and allowing the most vulnerable journals to fail.

07
Next steps and signposted resources

The toolkit is one of several resources you can draw on. Its primary companions are the financial sustainability template and its worked example. Beyond these, the resources below cover practical operational, policy and template material that you do not need to recreate from scratch, and pointers to the wider sustainability framework.

Operational and policy templates

- EIFL (2025), *Quality in Diamond Open Access Publishing: Guidelines, Policies and Templates* (v2, October 2025) — journal policy templates, author statements, licence agreements and technical guidelines for landing pages
  www.eifl.net/resources/eifl-guide-quality-diamond-open-access-publishing
- Ševkušić (2025), *Optimise your operations: Guide for Diamond OA publishers* — question-led prompts across 11 expense categories
  doi.org/10.5281/zenodo.14621766
- PKP (n.d.), *Sustainability Models and Revenue Sources* — taxonomy of OJS-compatible revenue options
  docs.pkp.sfu.ca/journal-policies-workflows/en/sustainability

On sustainability beyond finances

- Kwanya and Ateka (2026), *Sustaining diamond open access in Africa towards knowledge equity and community-driven publishing*, Information Development — the four-pillar framework set out in full, including knowledge equity, community engagement, and technology and innovation [paywalled]
  doi.org/10.1177/02666692514113l7
- Davidson and Franczak (2025), *The centrality of the workforce for Diamond OA* (SPARC Europe) — the workforce dimension treated in depth, beyond its financial accounting
  doi.org/10.5281/zenodo.14626444

Standards and policy frameworks

- DIAMAS (2025), *The Diamond OA Standard (DOAS)*
  doi.org/10.5281/zenodo.15227981
- DIAMAS (2025), *Diamond open access recommendations and guidelines for institutions, funders, sponsors, donors, and policymakers*
  doi.org/10.5281/zenodo.15518744
- Science Europe, cOAlition S, OPERAS and Agence Nationale de la Recherche (2022), *Action Plan for Diamond Open Access*
  doi.org/10.5281/zenodo.6282402

Evidence base

- Yoon, Ku and Chung (2024), *The road to sustainability: Examining key drivers in open access diamond journal publishing*, Learned Publishing
  doi.org/10.1002/leap.1611
- Bosman, Frantsvåg, Kramer, Langlais and Proudman (2021), *OA Diamond Journals Study* (cOAlition S)
  scienceeurope.org/our-resources/oa-diamond-journals-study/
- Chekole et al. (2026), *Funding sources of African no-fee open access journals*
  doi.org/10.5281/zenodo.18569134
- EIFL (2024), *Landscape of no-fee open access publishing in Africa*
  doi.org/10.5281/zenodo.12792473
- Ndege and Harle (2026), *Financing Open Research: a focus on African publishing platforms and journals* (INASP Policy Paper)
  doi.org/10.5281/zenodo.20551689

Advocacy material

- Davidson and Proudman (2025), *Talking points: Making the case to fund Diamond Open Access* (SPARC Europe) — ready-made arguments for institutional, library and funder conversations
  doi.org/10.5281/zenodo.14727743

Glossary

The toolkit uses some terms that are common in the scholarly publishing world but not always universally understood. The most important ones are listed below for reference.

AJOL	African Journals Online. The largest platform for peer-reviewed African scholarly journals, providing hosting and visibility.
APC	Article Processing Charge. A fee paid by an author or their institution to publish in an open access journal. Diamond OA journals do not charge APCs.
CC BY	Creative Commons Attribution licence. The standard open licence permitting reuse with attribution to the author.
COPE	Committee on Publication Ethics. A membership organisation that sets standards and guidance on publication ethics.
Crossref	The not-for-profit DOI registration agency used by most scholarly journals.
DIAMAS	Developing Institutional Open Access Publishing Models to Advance Scholarly Communication. An EU-funded project on institutional Diamond OA publishing, which produced DOAS and the international Diamond OA recommendations cited in this toolkit.
Diamond OA	An open access publishing model in which neither authors nor readers pay fees. Also sometimes called Platinum OA.
DOAJ	Directory of Open Access Journals. The principal global index of vetted open access journals.
DOAS	Diamond Open Access Standard. A DIAMAS deliverable setting out quality criteria for Diamond OA publishers.
DOI	Digital Object Identifier. A persistent identifier assigned to a published item to support citation and discoverability over time.
EDCH	European Diamond Capacity Hub. A European initiative supporting Diamond OA journals and platforms, including a free online training platform.
EIFL	Electronic Information for Libraries. A not-for-profit organisation that works with libraries to enable access to knowledge in developing and transition economy countries, and which led the project behind this toolkit.
FOSS	Free and Open-Source Software.

FTE	Full-time equivalent. A measure of working time: 1.0 FTE is one full-time post, and 0.2 FTE is about one day a week.
INASP	International Network for Advancing Science and Policy. An international development charity supporting research and knowledge systems, including training for editors and publishers.
JASPER	JournAlS are Preserved forevER. A preservation programme for DOAJ-indexed Diamond OA journals.
JATS / XML	Journal Article Tag Suite / Extensible Markup Language. JATS is an XML standard for structuring journal articles, used for indexing, preservation and repository deposit.
NREN	National Research and Education Network. A specialist network provider for universities and research institutions, which may offer hosting at low or no cost.
OASPA	Open Access Scholarly Publishing Association. A membership organisation for open access publishers.
OJS	Open Journal Systems. The open-source journal management and publishing platform maintained by PKP.
PID	Persistent Identifier. A long-term identifier for a resource, such as a DOI for an article or an ORCID for an author.
PKP	Public Knowledge Project. The non-profit organisation that develops and supports OJS and related infrastructure.
SaaS	Software as a service. Software accessed online by subscription, rather than installed and maintained locally.

EIFL DIAMOND OA SUSTAINABILITY PLANNING PROGRAMME

Financial sustainability planning toolkit for Diamond Open Access journals

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